

EVENT planning guide & checklist

NAME OF EVENT: _____

This worksheet will help prompt important considerations as you plan and organize your event. Please send any questions you may have to your VP representative.

FYI: The principal has requested that all PTA communication be filtered through the co-presidents to help her respond in a timely manner so do not contact her directly as she may not be as prompt in her reply.

COMMITTEE CHAIR(S) CONTACT DETAILS

Primary committee chair name: _____

Email address: _____

Phone number: _____

BASIC EVENT DETAILS

First step is to book the date & venue. Once this is approved by the principal you will need to fill out a 'facilities request form' that you can get from the front office.

Date(s) of event: _____

Start time: _____ (* Lextended Day is in Gym& Cafeteria until 6PM)

End time: _____ (no later than 8:30PM)

Event Location/s (check all that apply)

- Gym
- Cafeteria
- Classroom
- Other _____

In case of snow storm or other unforesee-able complications, please consider whether you need a back-up plan/date(s).

Back up date if needed: _____

FYI

School rules apply 24/7. Participants are expected to follow school rules at all times.

- respect for school property
- no running or shouting in hallways
- no use of gym equipment (i.e. Basketball)

Front doors will always remain locked. All foot traffic should come through the side entrance (voting doors/west end).

Side doors can be unlocked after 6PM if a request is made in advance

PART ONE CHECK-LIST:

- Facilities request form submitted
- Read the 'FYI' about school rules

Event details

Now that you have a time and place booked, there are some additional details to cover.

BUDGETING

1. What's your budget?

Do you know what the budget is for your event? Need more? Contact the treasurer at treasure@bowmanpta.org List what you think you'll need here. Accuracy is not critical. This is just a guide to get you started. The budget will be revisited later in this worksheet.

2. Cash box

If you are collecting cash at your event, you will need cash boxes and change

- No
- Yes , # of cash boxes needed _____
- Please let the treasurer know when and how many you need and how much change you need

FLOOR PLAN AND OTHER DETAILS

The custodian will help with the set-up and tare down. For instance, they will pull out PTA tables and other equipment as requested, but advance notice is important so that your event will run smoothly from the start. Please provide a floorplan for your event. You might not know exactly where everything will go, but it will be useful to have a preliminary map of the space. Show roughly where the tables/other furniture/equipment will need to go.

1. Floor Plan (check the circle that applies)

- I have a floor plan
- I need help with a floor plan
- No floor plan yet

2. Equipment needs

- PTA tables , 72"x30"x30"h (14 available).....how many # _____
- Extension cords
- Sound system & microphone
- Trash canshow many ? # _____
- Sandwich boards
- Projector
- Pop-up tents ,10' x 10' (2 available)how many? # _____
- Other List here:

***If you need additional tables/tents sending an email out asking the Bowman community to lend their personal tables*

FOOD AT YOUR EVENT

1. **Will there be food at your event?**

Yes → go to next question

No → Free pass to next page!

2. **Any food ...**

...you provide needs to be clearly labeled so anyone with food allergies will know what to avoid AND kids must have an adult with them to take the food.

Got it

3. **How are you providing food?**

Pizza ordering

Catering for the event

Other: _____

Marketing your event

If you are a seasoned pro, this section may be obvious, but many brave parents are organizing a PTA event for the first time. Go through this section to know what tools are available to help you with your event planning.

Use the checklist below to help you keep track of what you have/haven't yet done.

RAISE AWARENESS OF EVENT AT SCHOOL

You've organized an amazing event and now you want everyone to come and enjoy!

1. Publicize your event

Check out all the ways you can publicize your event at Bowman...

- Post event on PTA website (send info to webmaster@bowmanpta.org)
- Flyers sent home through student backpacks (see more on this below)
- Submit blurb and reminder in PTA weekly email announcements
- Submit event description to the Broadside (submissions due 1 week before the month)
- Morning announcements - need to have your blurb approved by Mary (plan 1+ week in advance)
- If your event is grade level specific - send announcement/reminder through the room parents contact list - contact room parent representative

2. Flyers

Flyers are a good way to ensure every family is given notice about your event. Plan to send a notice 2-3 weeks in advance. Anything going into student backpacks (such as a flyer) must be approved by the principal.

- Send the final draft of your flyer to the PTA co-presidents to be forwarded to the principal for approval.
- Flyers should be printed in 'black & white', but the color of paper is up to you
- Front office will help get the flyers to each classroom, but you need to sort by Family Count. (find this info here <http://bowmanpta.org/planning-pta-events-how-tos/>)

PR YOUR EVENT AROUND TOWN

Some events (like the Adventure Run) are open to the town so here are ways to spread the word through the town. Go to the PTA website for a comprehensive list of easy ways to do this:

<http://bowmanpta.org/marketing-your-event-outside-bowman/>

Additional considerations

NEED VOLUNTEERS?

You are the chair/organizer for the event, but it doesn't mean you have to do all the work. Delegate and spread the workload.

1. **Volunteer sign-up**

On the day of the event, you will often need several volunteers to help manage and run things. Sign Up Genius (<http://www.signupgenius.com>) is a great tool that is widely used throughout the LexingtonPublic Schools.

2. **Finding volunteers**

Recruit volunteers through the PTA website and weekly announcements and grade level class contact lists when appropriate

RECEIPTS AND REIMBURSEMENTS

Keep receipts for all your expenses. If you need to email photos of receipts to help you keep track, that is fine. To help the treasurer, send a final expense sheet with receipts and who to reimburse at the end.

Contact the treasurer at treasurer@bowmanpta.org

COLLECTING FORMS AND CHECKS

If you are organizing a program that requires forms and checks to be submitted, please read this section to help guide you through what needs to be done.

- Inform the front office the time frame in which you expect to collect the forms or checks
- The front office often will set up a separate collection basket for your PTA event/program to help organize the paperwork you are collecting
- Make it clear on your form who the checks should be made to. Checks should usually made to 'Bowman PTA' unless your event payment needs to go to an outside vendor
- Make sure you can track forms to student, grade, and class teacher

PARTICIPANT SIGN UP

What kind of sign-up is it?

- Limited seatings/openings (First-Come First Serve)
- Unlimited entries

If you have limited space for your event, please consider using an online registration form where entries can be timestamped. Those who don't make the cut-off can be easily waitlisted and tracked. Paper forms are impossible to prioritize and will lead to unhappy and often confrontational parents.

If you need help with setting up an online form, contact your VP rep