

SOCES PTSA

COMMITTEE EVENT PLANNING GUIDE

GENERAL INFO

Your name: _____

Phone _____ Email: _____

Project Name: _____

Description: _____

Project Date: _____ Budget for Event: _____

3 MONTHS + TO GO

- For new events, prepare event concept "pitch" and present to Principal and PTSA president, and ASB (if needed)
- Event concept recommended by PTSA Board and approved by Principal
- Event concept and preliminary format and budget presented to PTSA board
- Meet with your committee. Please remember the PTA president or board appointee will be part of the committee ex-officio and should be invited to meetings

Verify that the

- Event is allowable by PTSA insurance and PTSA guidelines
- You have staff
- Event has been allocated a budget
- Event Approved by association
- Event added to School and PTA Calendar (Tentative status)

2 MONTHS TO GO

- Complete Request for Authorization and submit Student Body Finance Form (*See flow chart and sample form for reference*). The LAUSD online format will become available mid-2021 at <https://fundraising.lausd.net/>. Offsite activities need to also complete a Request for Approval of Off-Site Special Event and an OEHS checklist (*see samples attached*)
- Flyers: Electronic literature/flyer copy sent to President, or appointee, for Approval (*ShermanOaksCESPTSA@gmail.com*) at least 5 business in advance of intended distribution; and Send to Principal for review and approval
- Approved Electronic literature/flyer copy sent to PTA webmaster for inclusion on electronic platforms & social media (*ShermanOaksCESPTSA@gmail.com*)
- Identify and order event supplies (Competitive price quotes may be needed)
- Begin recruiting volunteers (*submit to LAUSD, if required*)

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2+ WEEKS BEFORE

- If the event will take place on the school campus contact the SAA and the Plant Manager with any needs (*ie tables, chairs, trash cans, access to closets, water key, etc*) at least 5 days in advance
- Is additional communication needed?
- Volunteer status? How are signups going?
- All necessary approvals needed have been received?
- Supplies purchased?
- Set a plan for cleanup and any last-minute support
- Board and Admin in charge are aware of planning and any challenges needing assistance
- Flyers placed in teachers' mailboxes 3 days prior to distribution to students
- All volunteers have been confirmed, trained/given instructions Signups have been assigned slots (if applicable)
- Supplies are ready to go, and any setup plans are ready to be acted on
- Verify all final details and update Principal and PTSA president

WEEK OF EVENT

- You're ready for a successful event! Wrap up any last details and have fun!**
- Please ensure that any cleanup post-event is done using good earth-friendly behavior, including recycling. We also ask that you give a thank you to support staff and custodial staff for the hard work they do to support PTA events.

WRAP UP / POST EVENT

- Thank you to the volunteers
- Submit receipts for reimbursements within 2 weeks to PTA Treasurer
- Budget recap with Board any surprises, over/under and ideas for future planning
- Notes captured for next event, particularly if the chair is rolling off (email notes to the Board member in charge) or capture on this form in the space below – attach additional pages if necessary.
- Feel free to staple or add helpful documents, any and all information is welcome.
Submit Financial report to ASB Finance within 30 days of event completion (*see flowchart*)