

### 1. PRIOR TO PLANNING PROCESS – 6-8 MONTHS IN ADVANCE

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- Present event / activity to board (If new event, present in the Spring for following year)
- Request to schedule date(s) and times on master calendar to avoid conflicts with other activities and park and rec.
- Determine budget needs and present to PTO board / Treasurer. Items will be reviewed at the budget meeting in August
- Determine if outside equipment / vendors are needed (ex. Bounce houses, food, DJ, Vendors...)
- IF outside vendors will be needed (bounce houses or games), you must obtain a rental agreement for PTO from the outside vendor approx.. 3 Months prior to event. You MUST contact your PTO President for further details prior to moving forward with outside vendors and contracts. All vendors must be CMS approved.

### 2. PLANNING PROCESS – 1-3 MONTHS PRIOR TO EVENT

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- Create volunteer sign up links and include event on master volunteer grid at beginning of the year to generate awareness and volunteers for event.
- Announce planning meeting dates with volunteers. Share meeting dates at PTO meetings and via communication outlets
- Confirm ALL outside vendor arrangements (drop off times, unloading / loading, pick up times, event date and times...) approx.. 30 days prior to event (prior to ticket sales, flyers and announcements to general school population)
- Create flyers / communication verbiage approx.. 1 month prior to event. Flyers should be sent home 3 weeks prior to event, ticket sales (if needed) approx.. 3 weeks prior to event, ALL social media, newsletter and Parent Square announcements need to be sent to PTO President and Communications VP approx.. 1 week prior to announcement request date
- Cash box / Online sales must be requested approx.. 3 weeks prior to event. Please email PTO Treasurer and Communications VP, regarding these needs. Please note if you wish to offer CC sales and / or cash sales on the day of event.
- Create a diagram of your event and determine special requirement requests (ie. Trash cans, tables, chairs...). Email head custodian with a request for needs and include diagram

### 3. POST EVENT – 1-10 DAYS AFTER EVENT

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- Compile and submit all outstanding reimbursements to PTO treasurer (forms are located on PTO website)
- Complete the “End of event checklist” and return to the filing cabinet in PTO room (file under your committee name). Please include all paper copies of flyers. Save hard copy to your flash drive, located in your folder
- Send THANK YOU email to volunteers

