



Step-by-Step Guide: Planning a PTC Event

Thank you for volunteering to help plan a PTC event/activity. Here are the detailed steps for planning, running, and closing out events for the PTC.

NOTE: Committees are most effective when they clearly divide responsibility for the various tasks up front; we strongly encourage you to have a transparent conversation at the outset of your planning process in which each of the tasks below is assigned to a specific committee member (or two).

PLANNING PREP (At least 6-8 weeks in advance of the event)

STEP 1: Review Date, Budget, and Relevant Materials.

A [Board Member](#) will provide your committee with this year's proposed date, budget, and all appropriate materials from the previous year including last year's transition form, **Event Reservation Request ("ERR")**, flyers, and all other helpful documents.

STEP 2: Create A New Folder in Google Drive.

Make sure you have access to the appropriate [committee folder](#) on the PTC shared google drive. This is where you will create and save all new materials and can access old ones as well. **NOTE:** please make sure to create a NEW COPY; please do not save over the older version.

STEP 3: Contact Last Year's Chairs.

The Transition Form will have the Event Chairs' contact information from last year. Please feel free to reach out to them to ask questions and get as much helpful information as possible.

SCHEDULE YOUR EVENT (At least 6 weeks in advance of the event)

STEP 1: Confirm Event Date and Times.

Finalize the date, timing, and rain dates as a committee and with your appropriate Board Member liaison. Please review the [full PTC internal calendar](#) of events to see how your event aligns with other events happening that month.

If your event will NOT be at Broadmeadow, skip to the [advertising event section](#).

If You Are Scheduling an Event at Broadmeadow, Notes About Event Timing:

- In general, the Performance Center and cafeteria are NOT available for exclusive use prior to 8:20am (this includes for set up).
- Needham Extended Day Program (“NEDP”) uses the cafeteria, Performance Center, media center, and outdoor playground spaces from 2:45pm - 6:00pm. If your event would like to access one of these spaces during these times, the **PTC Presidents will need to ask NEDP permission** to use the space. Access to this space is not guaranteed.
- The way custodial fees are being assessed has changed this year:
 - The fees will be \$200 M-Sat, \$250 Sundays
 - They are triggered when: food served, 50+ people, access to building/bathrooms required outside of school hours (including 6pm on a Wednesday, for instance)
 - Rain dates - require cancelling 5 days in advance in order to avoid the fee
- Someone who has completed the Town’s Allergy Awareness Training must be present at every event where food is being served. Several Board members have taken the training. Reach out to committee leads or PTC Presidents if you’re unsure if someone will be present at your event.
- If your event will take place outside of the regular school day (after 2:45pm Mon-Fri or over the weekend), please check the [Needham Town calendar](#) to make sure the space is available.

STEP 2: Submit [Event Reservation Request \(ERR\)](#) to [PTC Presidents](#).

Complete and send the Event Reservation Request (ERR) form by email to the PTC Presidents for review. The Presidents will review and submit the ERR to Roberta Redpath, the school’s Senior Administrative Assistant, to reserve the space. **Please DO NOT send the ERR to Roberta directly.** The Presidents will email you as soon as the event is approved by the school and add your event to the [public PTC calendar](#).

If Your Event Takes Place Between 2:45pm - 6:00pm Mon-Fri:

Prior to submitting the ERR to the school, the Presidents will reach out to NEDP to ask permission to use their space (i.e., cafeteria, Performance Center, media center, outdoor playground) during their time. The Presidents will email you as soon as it is approved by the NEDP. **Please DO NOT send the ERR to NEDP directly.**

If your event will only take place inside the Broadmeadow building (you do NOT need access to playgrounds or fields), skip to the [advertising event section](#).

STEP 3: Submit a [One Time Special Permit to Park and Rec.](#)

If your event takes place on any outdoor school space outside of the regular school day (including parking lots, playgrounds, etc.) you will need to submit a permit request.

STEP 4: Consider planning for a Sensory Break Room. For particularly noisy or busy events (those that take place inside the school building but outside of school hours), the PTC is encouraging committees to consider offering a Sensory Break Room. If a committee wants to move forward with this option, please:

- (1) add slots for TWO parent volunteers who can supervise this break room to your event Sign Up Genius
- (2) contact the PTC presidents in order to reserve a nearby space and borrow materials for student use from Anne Cline-Scott, Special Education Coordinator

ADVERTISE YOUR EVENT (~4 Weeks in advance of the event)

Once the event ERR is approved, you can start to advertise your event. Please wait until you have approval from the PTC Presidents just in case there are any date and/or location changes. There are many ways to get the word out about your event or program. Using multiple methods ensures that everyone gets the message! Below are the steps for marketing your event and descriptions of the many different channels.

STEP 1: Create An Online Flyer and Blurb for Your Event.

Even if you don't plan to print paper flyers for your event, it is helpful to have a digital "flyer" along with your short blurb description that you can use as a base for the many different types of PTC communication channels.

Every electronic flyer and blurb should include:

1. Date, time, and location of the event
 2. PTC logo (find it [here](#))
 3. Link(s) to ticketing, registration, or SignUpGenius (SUG) for volunteers, if applicable
 4. Sponsorship information (if applicable)
 5. Committee contact information (name or group email)
- *If You Need To Recruit Volunteers:*
Contact the [Volunteer Coordinators](#) to help you create a [SignUpGenius](#) link using the PTC account with time slots and details for volunteers. They can also connect you with adults who have expressed interest in volunteering.

- *If Your School-Wide Event Has a Sponsor/Donor Only:*
The Fundraising Coordinators/School-Wide Events Coordinators will let you know if your event has a local sponsor. All electronic communications should include the appropriate sponsorship information. Please do NOT include any sponsorship logos on physical paper fliers.
- *If You Are Selling Tickets for the Event:*
Your supervising Board Member will provide you with the appropriate link for selling tickets. This is only appropriate for some school-wide events; all grade-level events are free.

Many committees choose to use [Canva](#) to create something. If you need help using Canva or creating a flyer, please contact creative@broadmeadowptc.org for help. See an example of a flyer [here](#).

STEP 2: Submit your Flyer and Blurb via the New [Online Communications Form](#).
Once submitted, the VPs will review your flyer and blurb and approve it or reach out with questions or edits. Once this process is finalized, your event will be included in the weekly PTC Newsletter, a one-off email blast (as appropriate), on social media, and on the outdoor sign.

If you have updates to your blurb (for example: you now want to focus on volunteers OR there was an extension on a deadline), please make sure to email it to the [VPs](#) by **Wednesday morning for inclusion in the following Thursday's bulletin.**

If you have specific language (beyond what you have submitted in the Online Communications Form) that you would like used on Instagram or the Outdoor Sign, please contact social@broadmeadptc.org and sign@broadmeadowptc.org directly.

STEP 3: Other Ways to Market Your Event.

Once your materials are approved by the VPs, you can move forward with other great ways to advertise your event. Please do NOT move forward with marketing until your flyer is approved by the VPs.

- **Class Reps:** Email the appropriate [Class Reps](#) if you would like information about your event sent to parents through the Class Reps as part of their monthly emails. Email your flyer, any relevant links (volunteers sign up, tickets, sales, website, etc), and information you would like to be highlighted.

- **Backpack Flyers:** If you choose to distribute a paper flyer, email your approved flyer to Needham Press via needhampress@yahoo.com. Be sure to make sure to state you are from Broadmeadow Elementary PTC, the name of the event or committee you are printing on behalf of (i.e., Popsicle Party) and include your contact info, the number of copies needed, the color of paper. Needham Press will email you when your copies are complete.

Every paper flyer should include:

1. Date, time, and location of the event
2. PTC logo (find it [here](#))
3. QR codes for to ticketing, registration, or SignUpGenius (SUG) for volunteers, if applicable
4. Committee contact information (name or group email)

NOTE: Sponsorship information CANNOT be included on paper flyers

- Color Ink & Paper: With the exception of certain fundraising flyers, all flyers should be **printed on white paper in black ink only**. If possible, try to save paper (and money) by printing half or quarter sheets and ask Needham Press to cut them for you.
- Number Of Copies: Check the [Flyer Distribution List](#) on the PTC website for the number of copies you need to make. Unless absolutely necessary, only make *1 copy per family* ("Oldest/Only" list). Please also make the following extra copies:
 - 1 for each teacher
 - 2 copies for Andy Garlick and Roberta Redpath
 - 8 for the Connections Program
 - 5-10 to leave on the PTC table by the main entrance, in case someone loses their flyer
- Distributing The Flyers: Using the [Flyer Distribution List](#), divide up the number of flyers needed for each class, place a sticky note on each stack of flyers with the teacher's name. Bring the organized flyers to the front office and the office will distribute the piles to the appropriate teacher box. Place extra copies on the PTC table in the entrance hallway.

When you pick up the flyers, you will sign a receipt and request a copy of the invoice. No payment is required at time of pick up.

You will then submit a printed copy of the invoice and the [Check Request Form](#) to the Treasurer (see [reimbursement instructions](#) below). **NOTE:** Regardless of the direct invoicing provided by Needham Press this submission process will still need to be completed for record keeping purposes.

SUPPLIES FOR YOUR EVENT

STEP 1: Look Through the PTC Closet.

Almost every event has a dedicated bin with saved items in the PTC Closet. The closet may also have extra water, snacks, tablecloths, and other helpful materials you can use. **Please look through the PTC closet before ordering any new items.** The PTC closet is located in the second grade hallway across from the Performance Center until late September; it will then be moving to the basement storage room. You can access the closet during regular school hours; once it moves downstairs, you will need to be accompanied by someone from the front office staff. Therefore, please avoid coming during school arrival and dismissal times as well from 11:00-12:30 (lunch) as much as possible.

STEP 2: Propose possible donations to Fundraising Chairs.

Often, many businesses in the Needham area are more than happy to donate items to the school if they are asked. If you think there is an opportunity for a local business to donate, [email the Fundraising Chairs](#). The Fundraising Chairs track donations and sponsorships throughout the year and can help you reach out to local businesses (and make sure another committee hasn't recently asked the same business already). Note: Please DO NOT reach out to businesses for donations before coordinating with the Fundraising Chairs.

STEP 3: Purchase materials. Purchases that you make for supplies for PTC activities and events are exempt from sales tax. If possible, try to have the sales tax removed from your purchases. Our sales tax exempt number is 04-3431845. If a vendor asks for our state sales tax exempt certificate, ask your Coordinator or a board member for a copy.

STEP 4: Purchase Food. When purchasing food or securing food vendors please keep in mind that a number of our families have children with serious food allergies, and we want all of our PTC events to be inclusive, safe and fun for everyone! Things you can do to help make your event allergy friendly include:

- Consider not serving food – Many times kids will be just as happy to receive a toy as a candy bar, so consider ordering some fun items from Oriental Trading Company or the party store instead of food treats.
- Serve Allergy-Friendly Alternatives – If you are running a food-based event, try to serve an allergy friendly alternative as well. Did you know that Dum Dum lollipops are free of all 8 of the top allergens (peanuts, tree nuts, dairy, eggs, fish, shellfish, wheat and soy)?
- Post All Food Ingredient Labels – Whenever food is served, please keep the original packaging on hand so parents (and older kids!) can read the ingredients. Post the ingredient labels in a conspicuous place, like on a tent card next to the platter.
- If your event will serve food that is not pre-packaged and/or needs to be temperature controlled (kept refrigerated or hot), you will need to apply for a [Food Permit](#). If you need help, contact your appropriate Board Member (e.g., school-wide, grade-level, etc).

Note: Potluck-style events where food is prepared OFFSITE do NOT need food permits, provided that no one is *selling* food and that they post [this information](#) at each food station.

If you are preparing any food ONSITE at Broadmeadow (e.g., Cotton Candy), you DO need to file for a food permit. When doing so, create an account & fill out the online form using:

Your personal contact info BUT the school's address

Write in N/A if you do not have what is requested

The name of a Board member who is certified in allergy awareness, and whose attendance at the event you have confirmed.

For other requested documentation, minimalistic menus and basic (hand-drawn) schematics of where food will be prepared will generally suffice. Check last year's folder on the drive to see if examples are saved.

STEP 5: Get a Cash Box. If your event will handle cash, you will need a cash box to make change. **Contact the [Treasurer](#) at least one week before your event to arrange to pick up a cash box.** Before contacting the Treasurer, think about how many \$1's, \$5's, and \$10's you will need and whether you need coins (avoid them if you can!).

NOTE: The School-Wide Events Coordinator/Fundraising Chairs will let you know and help you with the process if using **Venmo** is an option for day of event purchases in addition to providing a cash box.

AFTER YOUR EVENT

STEP 1: Store Leftover Supplies.

Return any borrowed (or newly purchased) items to the appropriate bin(s) in the PTC closet. Thank you for helping keep things organized!

STEP 2: Write a “Thank You.”

Within 1-2 days of your event’s conclusion, send a “Note of Appreciation” to the PTC VPs via bulletins@broadmeadowptc.org highlighting key details of the event, thanking all day-of volunteers and committee members. Please be sure that volunteers and committee members are listed alphabetically by last name and to double check spelling. Please also include a few photos from the event in your email, so that the VPs can include these in the newsletter and the Social Media Coordinator can also use them in posts.

STEP 3: Send Photos to the [Yearbook Committee](#).

Have your committee and encourage families to send photos from the event to the Yearbook Committee. Simply attach the photos, provide the event name, and include student names if possible.

STEP 4: Complete a [Transition Form](#).

This form is essential for next year’s committee to benefit from your learning and experience. It is very important to include information on expenses, lessons, learned, timing, and vendor contact information. Be sure to save it to the appropriate folder in the shared Google Drive.

STEP 5: Get Reimbursed for Expenses.

Expenses that you or your committee members incur should be submitted for reimbursement ***within one month of completion of your event.***

1. Complete a [Check Request Form](#). The form will ask for who should be reimbursed (you or the vendor), description of purchases, and the committee the purchases fall under.

NOTE: Committees should complete **one form per person, per event**. In other words, if two people on a committee each make purchases for the same event, each

person submits their own form with their own receipts. If you need to be reimbursed for several purchases from different vendors, you still only need one form to attach to the multiple receipts.

Remember, if you had flyers printed via Needham Press, please fill out a separate reimbursement form for this one transaction. Regardless of the direct invoicing provided by Needham Press this submission process will still need to be completed for record keeping purposes.

2. Attach a paper copy of your receipt showing your purchases or a vendor's invoice.
3. Email the Treasurer at treasurer@broadmeadowptc.org to make arrangements to deliver the request form and receipts to her. The Treasurer will inform you of how to collect your reimbursement check. Vendor checks will be mailed directly to the vendor.

STEP 6: Deposit Funds.

If your committee takes in money from the sale of tickets, products, or services, you are responsible for collecting, organizing, and depositing the money with our Treasurer. Please contact the [Treasurer](#) if you have any questions.

NOTE: Before Making a Deposit:

1. Organize and Count:
 - a. Separate out the amount of cash originally provided from the Treasurer to re-deposit (you can put this in a separate envelope or rubberband with a note).
 - b. Organize the remaining cash (by \$20s, \$10s, \$5s and \$1s), separating out the initial cash box amount, if any.
 - c. Roll the coins.
 - d. Organize the checks by similar denominations and make sure that **every check is made out to Broadmeadow PTC**, has the correct amount, and is signed and dated
2. Fill out a [Deposit Request Form](#)
 - a. If you have money from multiple events or fundraisers, please fill out a separate deposit form for each event.
3. For checks, put the deposit in the Treasurer's Inbox.
4. For cash, make arrangements with the Treasurer to give her the money. **DO NOT LEAVE CASH IN THE MAILBOX!**