

Three Oaks PTO Event Planner

EVENT NAME

Event Summary

Mission Statement: [goal for the event]

Timing: [what time of year]

Begin planning: [how far in advance to begin]

Location: [school]

Fundraiser: Yes/No

Budget: ??

Volunteers Needed: [number of volunteers needed]

Checklist (please add tasks as you go for future reference)

4-6 Weeks Prior:

- ☐ Review last year's event, fliers, budget, etc. so you know what is expected when the time comes and to gather any information on the event.
- ☐ Recruit committee members and assign roles
- ☐ Provide the preferred date and time of your event to the **Vice President** to approve
- ☐ Prepare a flyer to be sent home and email **Vice President** to approve
 - ☐ English and Spanish if possible (PDF format **or** "view only" Google Doc)
 - ☐ Black & White
- ☐ Provide the following details to the **Corresponding Secretary**
correspondence@threeoakspto.com for social media and website:
 - ☐ Any images for social media/website (jpeg format)
 - ☐ Suggested social media posting dates (may vary due to other scheduled content)
 - ☐ All key event details
 - ☐ Any volunteer sign up links
- ☐ Create a Signup Genius (if applicable)
- ☐ Attend PTO meeting to provide updates (Date)

3-4 Weeks Prior:

- ☐ Print and copy flyers (use PTO's green paper); distribute to teacher's mailboxes
- ☐ Order any props, decorations, food, or supplies needed (Use [Tax Exemption Certificate](#) when applicable)

1-2 Weeks Prior:

- ☐ Monitor sign-ups and registrations/payments (if applicable)

- ☐ Email participants to collect any missing payments (if applicable)
- ☐ Confirm delivery/pickup of supplies, food, or other items
- ☐ Confirm and re-send volunteer schedule
- ☐ Inform the **Treasurer** if cash is needed for the event
- ☐ Send any final social media postings to the **Corresponding Secretary** (includes any changes to deadlines)

Day of:

- ☐ Prepare any cash box/change if needed
- ☐ Print out final volunteer list and/or attendee list
- ☐ Arrive early for setup and coordinate with volunteers
- ☐ Troubleshoot as needed and make notes of things to improve
- ☐ Take photos for social media and send to **Corresponding Secretary**
correspondence@threeoakspto.com *(Please do not send pictures of children's faces unless you have permission from the parent)*
- ☐ Take photos for [yearbook](#) : All photos welcome!

After:

- ☐ Submit receipts with completed [Volunteer Check Request Form](#) to **Treasurer** for any reimbursements
- ☐ Complete a [Deposit Form](#) for any cash/checks collected and contact the **Financial Secretary** to coordinate handoff
- ☐ Submit pictures for [yearbook](#)
- ☐ Complete **Event Planner Takeaways** (below) for next year
- ☐ Attend the next PTO meeting to provide post-event summary **(Date)**

Budget

| Item | Budget | Actual |
|---------------------|-----------------|-------------|
| List specific items | Budgeted amount | Actual cost |
| | | |
| | | |
| | | |
| | | |

Money Raised

| Items Sold | Amount Raised |
|---------------------|-----------------|
| List specific items | Budgeted amount |
| | |
| | |
| | |
| | |

PTO Contacts Needed

- Emily Erbach, **Vice President** (vicepresident@threeoakspto.com)
- Alex Mamula, **Corresponding Secretary** (correspondence@threeoakspto.com)
- Jaime Gudino, **Treasurer** (treasurer@threeoakspto.com)
- Monica Shore, **Financial Secretary** (

Event Contacts

- Add any vendors or contacts used here
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2025/2026 Takeaways/Helpful Hints

- Notes and reminders for future years