



Procedures for Planning an Event at Fairlands

1. **Refer to the Event Planning worksheet, and present your plan to the PTA Executive Board** by contacting the PTA president and getting on the agenda for the upcoming Executive Board meeting. Upon review, the Board/PTA President will then place it on the agenda for the next PTA meeting. **All functions need to have approval from the PTA membership before they can proceed.** This approval is also necessary for the IRS and PTA insurance. Your plan should include a proposed budget, possible date, beneficiary or profits, target population... Even if your event is already accounted for in the PTA budget, you must have the PTA membership release those funds before they are available to you. PTA meetings are held the second Monday of September, November, January, March and April. Check the calendar on the website, www.fairlandspta.com for PTA Executive Board and Membership meeting dates.
2. For insurance purposes, PTA has very strict rules governing many activities; please **refer to the Red and Yellow Light lists** for guidelines on what is not covered and possibly covered under PTA's insurance. You can contact a PTA Executive Board Member for these lists.
3. PTA may not sign a "**Hold Harmless Agreement**" with a school district. If the district requests Fairlands PTA to do so, notify the PTA president. **Any contracts must be signed by the PTA President.**
4. **Plan your function within your budget.** If you foresee a problem, such as going over-budget, please let the Executive Board know immediately. The PTA membership must vote on how (generally) the committee will use the budgeted funds.
5. **Contact Ann Rodriguez (school secretary) to coordinate your event with other school and community functions.** Be aware of dates of religious, public and school holidays, other events, including activities at Hart Middle School, and testing periods. Make sure your event is accessible to all school families including time and length, days of the week, site and transportation. There are two calendars to check in the office. The first is on the counter in the "pit", which faces the PTA bulletin board. This calendar is for all Fairlands' events. The second is at Ann's desk. Once a date has been chosen, write your event into both calendars with the location and time.
6. Be sure to **complete a "Facilities Use" form if your event involves using the school facilities** even during school times. You can obtain this form in



the office. Also, notify the custodian prior to the event for special set-up arrangements. You can contact Carmen Betancourt in person or by e-mail at CBetancourt@pleasanton.k12.ca.us.

7. **The PTA president and principal must approve all written materials before making copies.** You can email your flyer to Laurie Whiteland at laurie.whiteland@gmail.com. For Ms. Michels, you can give or email it to Ann at arodriguez@pleasanton.k12.ca.us to pass on to her for approval.
8. **Provide necessary flyers, tickets, etc.** These are usually printed through the school district graphics department. You must complete a work order for copies. Copies of this form are located in the office. Your request can be sent through inter-office mail or you can hand deliver your order to 4750 First Street. Allow a week and a half for graphics orders. Turn around is faster if items are hand delivered to Graphics. **Fairlands PTA pin# is 00FA344.** Make 820 copies for the 776 students plus staff. Get flyers into teachers' boxes by Wednesday afternoon for "Friday folder" distribution. Be sure to give Ann a flyer when you distribute your flyers to the teacher mailboxes.
9. **Get information onto the Fairlands PTA Website and the PUSD E-connection.** E-mail the VP of Communications for inclusion on the website. For the E-Connections, e-mail Ms. Michels at kmichels@pleasanton.k12.ca.us and copy Laurie Whiteland.
10. **Submit information for the marquee** to Kristin Werder at least a couple of weeks in advance. Kristin's e-mail address is kwerder@sbcglobal.net. She posts events in order of date of event. If your event is a fundraiser, please provide a rough estimate of how much money was earned as quickly as possible after the event so that she can thank families on the marquee.
11. **Think "Green" when planning your event.** Contact the Green Team Chairs to have recycling containers at your event.
12. **Check the PTA supply closets on the second floor.** There are many items, including paper products and utensils. Please check there first before purchasing any supplies.
13. **Contact businesses or local attractions for donations if needed.** Letterhead is located on the website. Contact the President/Treasurer for the tax ID#, if needed.



14. **If you are receiving money for your event, please contact the Financial Secretary to coordinate counting and deposit of funds.** Please refer to the Cash Receipt Procedures located on the website or contact Casey Pozzi, Financial Secretary, at casey_pozzi@sbcglobal.net.

15. **Oversee your event and make sure it runs smoothly.** You can set up sub-committees to handle special duties. The VP of Volunteers, Lori Carducci, will provide a list of volunteers to you. Please contact Lori at lcarducci@att.net. Make every effort to contact everyone who signed-up to give them the opportunity to help. Involve others to encourage inclusiveness, interest, and participation. Provide the necessary guidance so your volunteers know what to do.

16. **Please assign someone to take pictures at your event.** Forward these pictures on to the PTA President and Michelle Gray, the Yearbook Coordinator. Copy photos to 2 disks, if possible, and place in the President and Yearbook Coordinator's mailboxes in the Teacher/Staff Workroom.

17. **Make sure to turn in your receipts for reimbursement within two weeks of the event completion.** Please refer to the Reimbursement Procedures information located on the website, or contact Rashmi Singhanian, Treasurer, rashmisinghanian@yahoo.com.