

PTA PARKING FUNDRAISER CHECKLIST

Congratulations on your PTA/PTSA unit's decision to host a parking fundraiser! When it comes to large-scale events such as this (i.e. Outside Lands, Hardly Strictly Bluegrass, Fleet Week, local community festivals, etc.), this is the best opportunity to help out your school and the school's children! If this is your PTA/PTSA unit's first time undertaking a parking fundraiser, there are some very important steps to take to ensure that it is a successful one for you! The good news is it's not terribly complicated. However, you do need to make sure that the process is monitored closely and that important timelines are met.

Below is a checklist, along with relevant information, of the steps that need to be done to ensure a smooth workflow to your parking fundraiser:

- Make sure that you have the support and approval from the school's principal. The additional support can be in the form of a teacher providing access to the schoolyard and locking up at the end of the day's event.
- NEW – You must set up an online account at <http://www.sfusdpermits.org>.** Fill out the SFUSD Application and Permit for the Use of School Property form. Only forms generated through the system with an **assigned permit number** will be processed.
- Print the form and have your unit's president or vice president sign, date, and initial (where indicated) the form. Once completed, have the school principal sign, date, and forward the form on to the SFUSD Real Estate and Asset Management Office for processing.
- Drop off a \$50 deposit to process the event paperwork to: SFUSD Real Estate Department
135 Van Ness Avenue, Rm. 116
- Allow sufficient time to get this done, which can vary. Aim for at least three weeks to one month in advance whenever possible. Facility Use Rental payment in full will be due one week prior to the event.
- Be sure to apply for a Special School Parking Event Permit. This is important as this is a new requirement in the agreement with the Office of the Treasurer & Tax Collector to not tax PTAs/PTSAs. Please contact:

Kari Gray, Executive VP
Parking Permits – 2nd District PTA
555 Franklin Street, Room 203d
San Francisco, CA 94103

Be sure to fill out the worksheet on the back and mail it back to Kari Gray for tracking purposes. Make a copy for your unit's own records.

- It is your unit's responsibility to procure event insurance to cover any liability during the course of your parking fundraiser. Knight Insurance Services of Ca (www.knightins.net) is the company that handles insurance for all PTA/PTSAs in California.

Please refer to their website for Loss Prevention Guide and/or PTA information:

<http://www.KnightIns.net>

User Name: ptausers

Password: member

Phone (800) 733-3036

Fax 818 662-9312

email: ptaca@knightins.net

If time is short, you may need to overnight your payment to receive the proof of coverage in time.

- The required information will be: 1) your unit's name, 2) the event you are holding, 3) the date(s) of your event, and 4) the location where the event is being held.
- Be sure to work with your unit's treasurer to establish a procedure to account for all donations received. This may include money drop-forms and PTA Deposit Forms. Try to not have too much cash on hand, so at least two to three cash counts/deposits should be done. Make sure the Executive Board knows how the funds will be secured and recorded prior to the event and TWO PEOPLE have been assigned to count the day's receipts (Treasurer and a trusted PTA member). Deposit the donations at the bank immediately to safeguard your unit's hard work! If this is done on a weekend, try to make deposits up until the bank's closing time. Keep all paperwork and deposit receipts for the treasurer for accounting purposes. This is your unit's lifeblood!
- Have **two** starting banks available to make change for patrons. Depending upon the size of the event and anticipated number of people parking, you should have \$150 minimum (for each volunteer) up to \$200 or \$250 in \$5 and \$10 denominations. If you need additional change, you might consider asking local merchants if they can help you with making *some* change. Please plan ahead so that you don't wipe out their registers.
- Keep all of your important documents in a binder (the certificate of insurance coverage, a copy of the permit, and anything else that you've gathered) available for inspection should a City & County of San Francisco official come by to check the validity of your operations.
- Have an emergency contact list available so that if issues arise, the appropriate people in-charge can address it even if they are off-site. Cell phone numbers are preferred. Do not let problems go unresolved!
- Gather your volunteer pool early! An event cannot be successful if there is no support from your school community. You can use a written list, an Excel spreadsheet or, better yet, use Google Docs to do an online sign-up sheet. Provide the link/URL to the sign-up form and send out an e-mail through your room parent e-mail loop (if your school has one established) or through your school's Wednesday envelope or newsletter. Be sure to get the names, e-mail addresses and cell phone numbers of the volunteers so that you can send out reminders or get in touch with them as needed.

Also, you should have two volunteers per shift throughout the day. Nobody should work alone. Start this two weeks to one month in advance, depending upon your available volunteer pool at your school.

- Purchase three-part valet parking ticket stubs so that you can match the owner to their car (they get one, the second goes on the dashboard, you keep the last one) and so that the treasurer can verify the total money received. You can look up vendors online.
- Advertise! Word-of-mouth, e-mail contacts, on Craigslist, local media. Flyers can also be helpful. Be sure to do this at least one week prior to your hosted event so that it stays fresh in everybody's memory.
- Post signs made around your neighborhood to help direct traffic to your school. Take them down at the end of each day to avoid any loss or theft.
- Keep track of all of your expenses so that you can build this event in to your unit's budget in subsequent years.

Remember, your school is part of the local community! Be a good neighbor and consider letting the immediate residents know of your school's intention of holding a parking fundraiser. A template letter is available for you to use and you can tailor it to your needs. Be sure to drop them off in the mailbox of each and every neighbor along the street where the schoolyard gate is located, and maybe a few houses around the corner on each end of the block.

Safety is paramount! If somebody tries to rob you, give up whatever you've got. Your life is more valuable than the money collected! Be sure to contact police to file a police report on the incident. You may also wish to contact your district police station and ask if they could do a drive-by check periodically throughout the day to ensure neighborhood safety.

Hopefully, your unit's fundraiser will be a successful one! And, please remember, the PTA's rule is that for every fundraiser, there should be three community-building events. If this replaces two or more separate, smaller fundraisers, then you're probably within operational guidelines.