MES PTO Chairperson's Guide to Event Planning

(8/2022 update)

Congratulations and thank you for taking these important projects on! The MES community will certainly benefit from your hard work and dedication.

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This Chairperson's Event Guide is for the purpose of helping you and your committee members with the PTO and school protocols. Additionally, we recommend that copies of the forms included are utilized as record-keeping tools for your committees and stored in the PTO Google Drive.

For any questions, please feel free to contact any of the Executive Board members to help: ptomitchellschool@gmail.com. The Executive Team is dedicated to making your committee's endeavors a success!



Project Management Timeline

Responsibilities

The following are other responsibilities expected of event and committee chairpersons:

- If possible, work with the previous chairperson to get information about the event/activity and look through the PTO's Google Drive-stored documents for information on previous years' activities.
- If you are proposing a new event, please complete the "Proposed Event" worksheet and submit it to the Executive Board within at least 45 days of the proposed event date. The Executive Board will review the proposal and get back to you within 10 days. It is the responsibility of the Executive Board to ensure that all activities are executed within the approved PTO budget and in keeping with the PTO Purpose as outlined in the PTO Bylaws. *Please hold off on booking vendors and contacting others (school, volunteers) until the event and budget is approved by the Executive Board.*
- Contact volunteers on your volunteer spreadsheet from the PTO Membership Directory. Initial contact should be made with volunteers to acknowledge their interest and let them know how and when you will next contact them.
- Attend the General PTO meeting and communicate with Exec Team members *prior* to the event to update members on your status and any further help you need. Be prepared to discuss supplies, budget, and communication.
- Attend the General PTO meeting *after* the event to discuss results and any suggestions for improvement of procedures and the event/activity in the future.
- Upload all files and pertinent information to the PTO's Google Drive. If possible, work with the next chairperson to pass down information for the event.

Visiting and Working in MES

Whenever you are going to spend time at MES, it is very important that you follow all current visitor procedures. Once buzzed in, please go straight to the location that you have been given permission to work in and let someone in the office know when you are leaving the building. All visitors must have completed a background check in order to be in the school during school hours. The form can be printed:https://woodburyct.govoffice3.com/vertical/Sites/%7B59751637-3DF2-41D3-B20A-866E470B1D1D%7D/uploads/School_Volunteer_Forms_12.2018.pdf?&pri=0

Budget & Requests For Funds

- As much as possible, each event/activity has a line item in the PTO Budget. The treasurer also has records of previous expenditures made by PTO Chairpersons and Committees. Work with the Treasurer to understand the budget for your event.

- *If your event/activity is not included in the scope of the PTO budget, it must be approved at a PTO Executive Board meeting before the money is spent.* Please complete the "Proposed Event" worksheet and email it to ptomitchellschool@gmail.com to request that your proposed event/activity be added to the agenda for approval.
- Reimbursement requests must be given to the PTO Treasurer. The Check Request Form can be found on our websites and in this packet. Original receipts must be submitted to the Treasurer as part of the request.

Collection Of Money

- At some PTO events, cash or checks will be collected. The Treasurer will manage the cashbox. If you need it, please contact the Treasurer in advance of the planned activity/event so that they may have it stocked with the appropriate amount of cash. A credit card reader may also be made available for the event if deemed necessary. This will also be managed by the Treasurer.
- For events that generate a substantial amount of cash, the Treasurer will collect the funds at the conclusion of the event or each business day of the event. If possible, the Treasurer will count the money in the presence of another PTO volunteer or board member.
- If your committee is collecting money ahead of the event, it is recommended that you request all payments be made via Paypal on the PTO website (PTBoard) or by check. The check should be made out to "MES PTO." The PayPal link and QR code can be found on the PTO websites.

Fiscal Responsibility

As a nonprofit organization, the PTO must keep accurate and auditable records of all finances. All Executive Members and Chairpersons shall maintain complete and accurate documentation to validate and track spending against the line-item budget and for reimbursement. This information must be readily available to PTO members.

Communications And Marketing/Flyers Regarding the Event

- All communication intended for MES families must be forwarded to the PTO Board for approval. Upon PTO Board approval, it will go to the MES principal for approval at least 48 hours before the proposed communication will be sent out. The Board and principal may request or make minor changes and will notify you if any major changes need to be made to the communication.
- All Principal Newsletter updates must be sent to the PTO Executive Board at ptomitchellschool@gmail.com by Tuesday the week before the newsletter is scheduled to be emailed by MES.
- All submissions for the PTO Happenings must be sent to ptomitchellschool@gmail.com by the 20th of each month prior to the publishing and printing date.
- Social Media (Facebook, Instagram, Twitter): email the social media chairs at ptomitchellschoolsocial@gmail.com and they will publicize the event on the social media platforms.
- There is a PTO cart in the vestibule that can be used to place/collect materials.
- If you would like a flyer included in the Region's Digital Backpack, please email it to webmaster@ctreg14.org.

Event Location Request

Once an event has been approved by the Executive Board, the Region's Facility Use Form will need to be completed by the event chairperson and emailed or physically submitted to the MES office staff. An insurance waiver/proof of insurance request must be made to the PTO Treasurer at this time via email (ptomitchellschool@gmail.com), too. This may take a couple of days to receive from our insurance agency and the District often requires it when submitting the Facility Use Form, so please be mindful of your timeline when making these requests. The insurance information and use form will then be sent by the MES office staff to Central Office for approval. An email confirmation of the event's approval will come from the MES office staff. Link to current form: https://resources.finalsite.net/images/v1626466591/region14/zq0vpvcqcusmijgexjk0/ApplicationfortheUseofSchoolFacilitiesnon-profitgroups.pdf)

PTO Storage Closet and Basement

PTO supplies are stored in the PTO closet in the MES basement. No perishable items are permitted to be stored in the basement. Please note that everyone is responsible for the cleanliness of the closet. Please return all items to their labeled locations. When possible, please update the closet inventory spreadsheet stored in the PTO's Google Drive.

Passing Down Information

By keeping accurate records on your committee's procedures and event planning, you are recording the information for future use by other, new chairs of that event/activity. This process ensures a smooth transition from year to year for the entire school community, as well as accurate cost-tracking against the impacted budget line items. You are asked to maintain a record of all important information for your event/activity in the PTO Google Drive.

Again, thank you for all that you are doing for MES and its students! Do not hesitate to contact any member of the Executive Board with your questions and concerns.

Event Worksheet

Completing this form or something similar during event planning is encouraged in order to maintain a record of activities. Please store a copy of this in your committee's Google Drive folder.

Chairperson's Name: _____

Contact Info: Phone: _____ Email: _____

Event: _____

Date of Event: _____

Venue/Facility: _____

Overview of Event:

_____

_____

_____

Communications/Marketing Plan: (Please upload copies to the PTO's Google Drive)

_____

_____

Vendor Contacts Used: (Please upload copies of communication/receipts to Drive.)

_____

_____

Meeting Notes: (Please upload meeting notes to the PTO's Google Drive.)

_____

_____

*Please upload a copy of the Facilities Use Form (if needed) to the PTO's Google Drive.

Proposed Event Worksheet

Both pages of this form must be emailed to the Executive Board, ptomitchellschool@gmail.com, at least 45 days before the proposed event date. The Executive Board will review the proposal and get back to you within 10 days. It is the responsibility of the Executive Board to ensure that all activities are executed within the approved PTO budget and in keeping with the PTO Purpose as outlined in the PTO Bylaws. Please hold off on booking vendors and contacting others (administration, school, volunteers) until the event and budget are approved.

Chairperson/s Name/s: _____

Contact Info: Phone: _____ Email: _____

Proposed Date/s of Event: _____

Venue/Facility:

_____

Overview of Event:

_____

_____

_____

Proposed Budget:

Item	
_____	$_____
_____	$_____
_____	$_____
_____	$_____
Total	$_____

What volunteer support do you anticipate needing to make this event happen?

_____

_____

What school support do you anticipate needing to make this event happen?

_____

_____

Is there any additional information the Board should be aware of for this event?

_____

_____

TO BE COMPLETED BY THE EXECUTIVE BOARD

- Does this event align with the PTO Purpose as outlined in the Bylaws? Y/N
  - If it does not align, please provide feedback:

- Can this even be executed within the PTO Budget? Y/N
  - If yes, the budget approved for this event is: $ _____
  - If no, please provide feedback:

- Additional notes for the chairperson/s:

_____

MES PTO Expenditure Policy

Before making a payment or purchase for which you intend to seek reimbursement, please note the following:

1.) For a specific event, planned expenditures must be….
Itemized on the Event Expense Plan form if the total exceeds $25.00, Within the specified budget, & Submitted to the PTO Executive Board for approval *prior* to expenditure.

2.) Once the expenditure has been approved…
All receipts must accompany the completed itemized Expense Report and The Check Request form must generally reflect the previously submitted expenditure plan.

3.) The Check Request Form must be submitted within 15 days of the expenditure and the reimbursement will be returned within 15 days of the submission.

4.) For capital expenses previously approved by the budget, no Expense Report is needed. Only a Check Request form is required with the original receipt or invoice.

5.) If a vendor is to be paid directly via invoice, no Expense Report is needed. Only a check request form is required with the original invoice.

6.) To exceed budget allotment for a specific event or capital expense by greater than $25.00, a request must be presented to the MES PTO board *prior* to expenditure.

Event Expense Plan

This is only required if the event is going to exceed the existing budgeted amount for an existing/approved event.

Budget Category: _____ Date of Event:_____

Name of person submitting request: _____

Date of Request: _____

Planned Purchases:
*If more space is needed, simply attach a second sheet

** Total must not exceed $25 over the budgeted allotment

_____ $ _____
_____ $ _____
_____ $ _____
_____ $ _____
_____ $ _____
_____ $ _____

Total $ _____

TO BE COMPLETED BY THE EXECUTIVE BOARD

Date Approved: _____

(2) ** PTO Execute for approval* Signatures for approval:

_____ _____

MES PTO Event Expense Report

Chairperson Name: _____

Event: _____

Date: _____

DATE	VENDOR	ITEMS PURCHASED	COST

Total: _____

An Expense Report must accompany all reimbursement submissions within 15 days of the event.

All information must be completed and all original, itemized receipts must be submitted.

Treasurer Signature: _____

Chairperson Signature: _____

Check Request Form



Check Request Form

Mitchell Elementary School PTO
14 School Street
Woodbury, CT 06798

Date Submitted: _____

Person making request: _____

Email Address: _____

Telephone: _____

Purpose: _____

Check Amount: _____

Payee: _____
Please attach all receipts and Expense or Vendor Invoice

Delivery instructions: _____

****

Section to be completed by PTO Treasurer

APPROVAL:

Budget Allocation: _____**Expense Report or Invoice/receipt (circle one)**

Prior Approval: YES _____ NO _____ Notes: _____

Date Paid: _____ **Check Number:** _____

Signature: _____

Signature of PTO President or Treasurer

****

Questions? Please contact the PTO Treasurer at ptomitchellschool@gmail.com

Event Checklist

To Do	Helpful Materials
☐ Get Approval ➢ If this is a planned event that was included in the calendar/budget and you have a clear budget, go for it! ➢ If this is a newly proposed event, complete the "Proposed Event Worksheet" and submit it to the Executive Board at least 45 days before the proposed event date for approval.	"Event Worksheet" (page 5) "Proposed Event Worksheet" (page 6) Facility Use Form inventory spreadsheet PTBoard - MES
☐ Create a Team ➢ Have clear chair/s, and depending on the size of the event, you may want to form a committee ➢ Reach out to volunteers & be clear about the team's needs (chair event, help plan, help on the day of the event with time slots) ➢ Set up meeting times, email, & record notes ➢ If you are asking for volunteers to bring donations or to volunteer their time on a specific day, use PTOBoard for sign-ups.	21-22 MES PTO Contact Directory
☐ Share Plans ➢ Share plans with the Executive Board before the General Meeting and before publishing/communicating anything to the school or public. The Board will help to coordinate PTO efforts and oversee communication with the school and the public. ➢ If the event is going to exceed the existing budgeted amount for an existing/approved event, please submit the "Expense Plan" for approval to exec. ➢ Attend the General PTO meeting to provide updates.	ptomitchellschool@gmail.com "Expense Plan" (page 9)
☐ Market the Event ➢ Make a flyer and/or upload draft information to PTBoard. ➢ Prior to publishing, share flyers/info/posts with the executive board. The board will share it with the principal for approval and get back to you regarding publishing. ➢ Important Deadlines for Info Sharing: ● Principal Newsletter: Tuesday the week before ● PTO Monthly Happenings: 20th of each month ➢ Social Media (Facebook, Instagram, Twitter): email the social media chairs at ptomitchellschoolsocial@gmail.com and they will publicize the event on social media. ➢ There is a PTO cart in the vestibule that can be used to place/collect materials. ➢ If you would like a flyer included in the Region's Digital Backpack, please email it to webmaster@ctreg14.org. ➢ There is a sandwich board in the closet that can be used outside near drop-off/dismissal.	Canva.com PTBoard - MES ptomitchellschool@gmail.com ptomitchellschoolsocial@gmail.com webmaster@ctreg14.org

☐ Day of Event ➢ If money is being collected, contact the treasurer to help with the cash box and PayPal reader. ➢ At the end of the event, return all items to their labeled place in the closet.	
☐ Record Event Information & Thank Participants ➢ Maintain a record of all important information for your event/activity in the PTO Google Drive for future planning. ➢ Send a Thank You note to all who volunteered, donated, and worked as a vendor for the event (any written format acceptable).	PTO Google Drive “Event Worksheet” (page 5) “Expense Report” (page 10)
☐ Receipt Reimbursement ➢ Maintain complete and accurate documentation to validate and track spending against the line-item budget and for reimbursement (save receipts/invoices). ➢ Submit “Check Request Form” for reimbursements to the Treasurer at the PTO email.	“Check Request Form” (page 11) ptomitchellschool@gmail.com “Expense Report” (page 10)