

# Event Coordination Handbook



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Thank you for volunteering your time to coordinate a KWC PTO event! Your efforts will help accomplish the PTO's mission of strengthening our school community and enriching the lives of our children. Please use the information in this handbook to guide your event planning and execution.

**As an event coordinator, you are responsible for:**

- ❖ Reviewing the event responsibilities in this handbook and any additional event-specific responsibilities as required with the President and/or the board member who oversees your event.
- ❖ Giving regular status updates to the board member who oversees your event.
- ❖ Managing the event budget.
- ❖ Advertising the event.
- ❖ Recruitment of volunteers to help execute your event.
- ❖ Summarizing your event and reporting your event expenses and income to the board member who oversees your event.
- ❖ Adhering to PTO bylaws and school policies while planning and executing your event.

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**Detailed guidelines in this handbook include:**

1. How to prepare for your event
  2. How to enter into contracts with vendors
  3. How to solicit and receive donations
  4. How to handle issues with the event budget
  5. How to handle event purchases
  6. How to request a reimbursement for event purchases
  7. How to handle money collected prior to or during events
  8. What to do after your event
  9. Event Summary Form
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**How to prepare for your event:**

Planning can begin as early as you would like. Listed below are specific items that need to happen prior to the event.

*3 months before event*

- PTO President will submit School Use Form to book the school space for the event/activity.

*2 months before event*

- PTO President and board member who oversees your event will schedule a check-in meeting to go over expectations and your general event plans.
- Develop detailed plans for how to execute the event. Discuss as needed with the board member who oversees your event.
  - PTO owns and maintains certain event supplies. Reach out to the Secretary to see what items are available for your event.
- Begin attending monthly general member PTO meetings to give updates about the event. If you cannot attend the meeting, please send an update the board member who oversees your event to give one on your behalf.

*1 month before event*

- Advertise the event through the channels listed below. All marketing for your event must be approved by the PTO President. KWC is a green school and no paper advertisements should be printed for distribution to students/parents.
  - **Facebook:** Within the KWC PTO group, create a FB event and post reminders as the event draws closer. No separate approval process is needed prior to creating events and reminder posts as President approves all FB content for the group.
  - **Myschoolanywhere school-wide email:** Create a fun one-page flier about the event. Send to PTO President for approval at least 1 week prior to the date the event should be advertised. Once approved, please send flier to the Secretary for distribution. (President will coordinate getting principal approval of same flier for distribution via Peachjar).
  - **LCPS KWC PTO Website:** Send information about the event to the PTO President (can be the same flier used for myschoolanywhere).
  - **PTO Newsletter:** Send information about the event to the Secretary by the 3<sup>rd</sup> week of the month. President approves the entire newsletter once the Secretary compiles it.
  - **Front Office:** Print a copy of your flier and give to the front office staff.

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- Create a volunteer signup genius if volunteers are needed to set-up, execute, clean-up, and/or provide items for the event. **\*Please use the PTO signup genius account.** Contact your board member to get the login details.
  - Provide the signup genius link on fliers and newsletter updates. PTO President will upload it to the PTO website.

### *1 week before event*

- Check volunteer signup and re-post on FB to fill empty slots.
- Post a FB reminder of the event.
- Submit *Cash Box Form* to Treasurer 1 week ahead of the event if money will be collected at the event. For more details, see section: *How to handle money collected prior to or at events.*
- Assign someone to take a few pictures at the event (could be yourself or one of the volunteers).

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### **How to enter into contracts with vendors**

- KWC PTO should only enter into **written** (not verbal) contracts.
- Contracts are valid only when signed by the PTO President. Any other person signing a contract can be held personally liable for the full amount.
- For significant purchases, at least three price quotes/bids should be obtained to help ensure that the PTO is receiving the best value.
- Independent contractors earning above \$600 must supply a street address and social security number for IRS purposes (form W-9). Work with the Treasurer to ensure everything is in order.
- Any potential contracts with persons or companies related to a PTO board member or coordinator must receive special review by the PTO board to ensure that no conflict of interest exists.
  - If reasonable effort on the PTO's part can yield a similar contract that would not be a conflict of interest, this is the preferred approach.

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### **How to solicit and receive donations**

Certain events may require soliciting donations from the community in the form of monetary or non-monetary contributions. As a federally tax-exempt 501(c)(3) organization, the PTO has certain responsibilities to donors.

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- **Talk with the PTO President *before* contacting potential sponsors or donors.** The PTO President is responsible for maintaining a list of donations received, and care must be taken not to request donations from the same company on a repeated basis during the school year.
  - Donation requests should be submitted to potential donors on PTO letterhead.
  - Any donor who requests documentation of the PTO's tax-exempt status should be provided with our IRS tax-exempt "determination letter." Contact the Treasurer for a copy of this letter.
  - Report any donations received to the PTO President in a prompt manner.
  - **Event coordinators are responsible for giving thank you notes to donors.** Coordinate with both the President and the Treasurer.
    - Contact the Treasurer prior to writing the thank you note to see if certain wording to satisfy IRS requirements is necessary.
    - President must sign the note, along with the event coordinator signature.
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### **How to handle issues with the event budget:**

- Contact the PTO board member who oversees your event immediately once you realize you will go over the approved budget.
  - If a budget revision or over-run is warranted, it needs to be approved by either the PTO board or the general membership, depending on the amount. Changes must be approved **prior** to any additional money being spent.
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### **How to handle event purchases:**

- The budget amount for your event is available once the budget is approved at the first general member PTO meeting in September.
- Whenever possible, the PTO should pay for event expenses directly. This eliminates the need for a reimbursement and allows us to take advantage of the PTO's tax-exempt status. To have the PTO pay directly:
  - Contact the PTO board member overseeing your event with an invoice of item(s) to be purchased.
  - The Treasurer will pay the invoice using PTO funds and will take care of the tax-exempt form.

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- If you plan to pay for expenses, the Treasurer can give you our tax-exempt form. For certain stores, we have a special exemption card that must be used. \*You will need to get a tax-exempt form from the Treasurer **prior** to purchasing items.
  - Track expenses on the worksheet provided in the *Event Summary Form*. This form will need to be submitted to the board member who oversees your event.
  - **Please do not underreport or eat expenses.** If you do not report all the expenses needed for an event, this causes planning and budget issues for the event in future years.
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### How to request a reimbursement for event purchases

If you paid for event expenses yourself, you will need to request a reimbursement.

- **All reimbursements require an original receipt.** Please purchase PTO-related items on a separate receipt from your personal items.
  - The PTO will not reimburse sales tax for any items.
  - A *Reimbursement Request Form* must be filled out and submitted to the Treasurer **within 10 days of the event**. Submission can be via email or by delivering the form to the Treasurer's mailbox in the KWC front office.
    - Blank Reimbursement Request forms are available on the KWC PTO website.
  - Allow 2 weeks for processing of a reimbursement. If a reimbursement is needed quickly, please contact the Treasurer to expedite the process as much as possible.
  - **All requests for reimbursements must be submitted by June 1<sup>st</sup>** to allow adequate time for processing prior to the close of the PTO books on June 30<sup>th</sup>. No reimbursements can be made after June 30<sup>th</sup>.
    - The only exceptions are end-of-year parties and other June events, which are due by the last day of school.
  - If you wish to donate any items you purchased for the event, please contact the Treasurer.
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### How to handle money collected prior to or during events:

All events involved in raising funds or handling money should clearly designate someone to control the money and follow the procedures below (can be yourself).

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### *Before the event*

- Money collected prior to the event must be transferred to the Treasurer promptly. Please coordinate an in-person drop off. \***Do not leave money in the Treasurer's mailbox at the front office.**
- PTO check acceptance policy:
  - All checks should be made payable to KWC PTO.
  - The PTO utilizes a check re-deposit service to help collect on bad checks. It is critical that advance notice of this service is provided to those who write checks to the PTO. **The following wording must appear on any fundraising documents where checks may be accepted:**  
  
*Your personal checks are welcome with valid identification. If your check is returned, NSF, it may be re-presented electronically, and you will be assessed a processing fee of \$20-\$30 or the maximum amount allowed by law. The check writer is also responsible for all other check recovery costs, including all attorney's fees, court costs, and taxes.*
- *Cash Box Request Form* must be given to the Treasurer **at least one week before an event**. Blank forms can be found on the LCPS KWC PTO website.
  - The PTO has two cash boxes with \$100 available for use. Please contact the Treasurer if this will not be enough for your event.
- Download the PayPal Here app to accept credit cards at your event. The PTO Treasurer will give you a user name, password, and instructions when the cash box is delivered at the event.
- Note that for events or fundraisers where money is sent in advance or through the classrooms, **cash payments should be discouraged**. We have no way to safeguard cash moving through the school or in the office.
- Plan to bring the *Cash Box Reconciliation Form* with you to the event. Blank forms can be found on the LCPS KWC PTO website.

### *At the event*

- The Treasurer will give you the cash boxes requested. Leave enough time to get the PayPal phone plug-in set up.
- **Never leave the money alone.**

### *End of event*

- **Cash Boxes MAY NOT be left at the school with anyone. Front office staff employed by the school are not allowed to hold any PTO money.**

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- All funds received in cash must be counted by two people, preferably with one of the two being a PTO Board Member. Please separate currency by denomination.
  - Fill out the *Cash Box Reconciliation* form and submit the form with the money to the Treasurer within 24 hours. If Treasurer is not present, please give to a PTO board member.
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### What to do after your event

- Write a short summary, post a few pictures, thank volunteers, and any donors involved on KWC PTO FB page. Board will recreate your post for Twitter, PTO newsletter as needed.
  - Formally thank volunteers through email.
  - Formally thank sponsors and/or donors with a signed note. See: *How to solicit and receive donations*.
  - **Submit your *Reimbursement Request Form* within 10 days of the event. You must have receipts to be reimbursed.** Make a copy of the completed form for your records. Blank copies are on the LCPS KWC PTO website. See: *How to request a reimbursement for event purchases*.
  - **Submit your *Event Summary Form* within 10 days of the event.** Blank copies are on the LCPS KWC PTO website.
    - Record details that would be helpful for future planning.
    - Please record all expenses and income in the worksheet provided. \*Do not underreport or eat expenses! Accurate information is crucial to future planning.
  - Debrief as needed with the board member who oversees your event.
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## Event Summary Form

Please fill in the following details about your event. Recording this information helps the PTO with future event planning and improvements. Thank you!

Event:	
Event Coordinator:	
Date of Event:	
Time of Event:	Start:
	Finish:

Name of Donors/Sponsors:	
What did they provide?	

PTO supplies used:	
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# of Volunteers Needed for Event:	
What did the volunteers do?	



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Provide a brief description  
of event execution.

What worked well?

What problems did you  
encounter?

What improvements can  
be made in future?

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Please record all of your event expenses and income in the table below.

Event Expense	Cost	Event Income	Amount
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
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	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
<b>Total Expenses:</b>	<b>\$</b>	<b>Total Income:</b>	<b>\$</b>