

Guide to Chairing a PTA Event

J.R. Briggs Elementary School

PTA[®]

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INCLUDED FORMS:

Acknowledgement of Appointment
Suggested Program Planning Timeline
Action Plan
Facilities Use Form
Check Ledger
Deposit Notice
Sales Tax Exemption Certificate
Cash Box Request
Check Request
Reimbursement Form

Guide to Chairing a PTA Event

Dear Volunteer,

Thank you for volunteering to be the Chairperson for a JRB PTA event!

Your support is greatly appreciated.

To assist you in planning and running your event smoothly, we have prepared the attached packet.

Any form mentioned has been included in this packet for your convenience.

Please seek guidance from any board member if you have questions.

With sincere gratitude,

JR Briggs PTA Board

Guide to Chairing a PTA Event

Action Plan

It can be helpful to have an action plan with due dates when planning an event. It is not required that you use the Action Plan in this packet, but in case you want to do so, one is provided for you.

Building Use

All programs must have a completed Facilities Use Form on file.

Communication

The JRB PTA Secretary maintains a membership list that can be used for contact with members.

Requests can be made for the Principal to send school-wide email communication, but it is appreciated if you provide a minimum of one week's notice.

Flyers and registration forms may be sent home with students, but advanced planning and communication with the Main Office is greatly appreciated.

Posters may be hung only in approved areas of the school and should be coordinated with the Main Office.

Social Media may be used to communicate about events, but in order to ensure the safety of our students, must receive prior approval from a Board Member and/or the Principal.

Recruiting Volunteers

The JRB PTA has an established relationship with the Oakmont Peer Leaders. Please consider reaching out to our Peer Leaders for event support.

JR Briggs Elementary School maintains a list of volunteers which can be accessed by contacting the Main Office.

For the safety of our students, ALL volunteers must have a CORI check completed and on file with the Main Office prior to volunteering at any JRB PTA Event.

Any outside vendor who will attend an event where students will be present must have a CORI check completed and on file with the Main Office prior to the event.

Guide to Chairing a PTA Event

Media & Photography

The JRB PTA has elected to adhere to the guidelines of the JR Briggs Elementary School with regard to media and photography.

Budget

Each approved program, event or fundraiser will be provided with an operating budget at the start of the planning process. The event chairperson is responsible for monitoring the budget for their event.

This includes:

- Complete Check Request to receive approved funds from the PTA Treasurer. Providing a detailed Event Budget (projected) to the Executive Board at the start of the event planning process
- Retaining all receipts and invoices related to the event
- Ensuring that expenditures do not exceed the approved budget amount
- Responsibility for Cash Box (if being used during the event)
- Completing all paperwork
- Returning all unused advanced funds, earnings and records to the PTA Treasurer within one week of event completion

Setting Sale Prices & Cash Handling

Pricing for direct sale items with a value greater than \$5 must be approved by a member of the JRB PTA Board.

- Checks should be made payable to JR Briggs PTA - Verify the legal line (longhand written)
- Separate all Cash from Checks
- All bills facing the same direction
- Remove any staples
- Count checks and complete Check Ledger, keep checks in order of listing and total the amount received
- Complete the Deposit Notice
- All money should be turned into the PTA Treasurer within one week of the end of the program, event or fundraiser

Sales Tax

The J.R. Briggs PTA is a non-profit organization and is tax exempt. When making a purchase on behalf of the JRB PTA, please ensure that you have received a copy of the Sales Tax Exemption Certificate from the Treasurer prior to your purchase. *Please note: JRB PTA is unable to reimburse sales tax.*

Guide to Chairing a PTA Event

Cash Box Use

For the purpose of starting a program, event or fundraiser, the JRB PTA may make available a Cash Box containing a predetermined amount of funds.

To request the cash box be made available for a program or event, complete and submit the Cash Box Request form no later than one week prior to the program date and submit it to the Treasurer. When you receive the Cash Box Request, you will receive the Cash Box Procedures.

Purchasing Best Practices & Selecting a Vendor

It is the preference of the J.R. Briggs PTA to shop locally whenever possible and practical.

Funds that have been approved for a specific event or expense may be spent at the discretion of the chairperson. The chairperson is required to retain all records of the expense and turn them into the PTA Treasurer upon completion of the event or sale, along with any unused funds.

To request a direct vendor payment, complete the Check Request form and submit it to the treasurer for review. All requests for payment will be approved either at the next general meeting or during an Executive Committee session; whichever occurs first, providing that quorum has been attained.

Contracts

Only Board members with signature authority for the JRB PTA may authorize and sign contracts on behalf of JRB PTA.

Reimbursement

If you incur an expense that falls within an approved budget line, and you have not received advanced funds for this purchase, you may complete a Reimbursement Form and submit it to the Treasurer for review. All reimbursements will be approved either at the next general meeting or during an Executive Committee session, whichever occurs first.

Acknowledgement of Appointment

I have volunteered to act as Chairperson for the following event/committee/fundraiser:

Event Name: _____

Event Date: _____

- *I acknowledge that I have received the Guide to Chairing a PTA Event.*
- *I acknowledge that the PTA Board will make every effort to support me as Chairperson. I understand that it is my responsibility to ask for help if I feel I have not received sufficient guidance.*
- *I will provide detailed information about my event to the PTA Board at its end and I will act as a resource for future chairpersons.*
- *I will strive to represent JRB PTA in a positive manner.*
- *I will strive to ensure that my event is in line with the goals and mission of the National PTA, Massachusetts PTA and this local unit.*

Signature

Printed Name

Date

Suggested Program Planning Timeline

When you volunteer to chair a Program:

- ✓ Make sure you know what the budget for the program is. If necessary, request any approved funds for your event from the PTA Treasurer using Check Request form.
- ✓ Watch pta.org for program information and grant applications (if applicable).

8–12 Weeks Before Your Event

- ✓ Recruit your event team and begin holding regular planning meetings or conversations via phone or email.
- ✓ Review program goals. Decide the key elements of your event.
- ✓ Establish how you will spend your budget and determine what additional resources you will need.
- ✓ Reserve needed space at the school or (if necessary) secure another free or low-cost location nearby. Be sure to consider accessibility for family members with mobility challenges.
- ✓ Reach out to speakers and other guests (including sponsor representatives, if applicable), to ensure that they are available on your planned dates. Make adjustments to the plan as necessary, with Board approval.
- ✓ Share your plan with school leaders to elicit their support for the event.

6–8 Weeks Before Your Event

- ✓ Begin promoting the event to families. Add information to the school and/or PTA webpage, newsletter and other announcements and promote via social media.
- ✓ Contact community members for in-kind donations, if needed (e.g., refreshments, transportation vouchers, copying services).

4–6 Weeks Before Your Event

- ✓ Solicit volunteers needed for event day.
- ✓ Begin the process of translating program materials into other languages if needed.
- ✓ Secure any A/V equipment needed.

2 Weeks Before Your Event

- ✓ Finalize event logistics, including creating a detailed day-of-event schedule.
- ✓ Make sure you are familiar with any safety guidelines and emergency procedures specific to your location.
- ✓ Make arrangements for sign language interpreters or other accommodations for families, if needed.
- ✓ Have a backup plan for inclement weather, including how you will let families know in a timely manner if your event must be canceled or rescheduled.

Suggested Program Planning Timeline

1 Week Before Your Event

- ✓ Make sure parking is available for families.
- ✓ Be sure all volunteers know their roles, when to arrive and where to report.
- ✓ Consider assigning dedicated, trusted volunteers to critical roles, such as:
 - Greeting attendees and staffing the membership table
 - Setting up and testing any audiovisual equipment
 - Serving as the single point-of-contact for media
 - Acting as “host” to attending officials, community partners or sponsor representatives
 - Responding to vendor questions and facilitating prompt payment
- ✓ Make sure you have all of the materials you need, including:
 - Welcome and directional signs (in multiple languages, if needed to fully represent your school community)
 - Copies of handouts
 - Sign-in sheets
 - Agendas/programs
 - Name tags
 - PTA “Crash Bag” full of pencils/pens/paper/tape/scissors/other miscellaneous supplies that you may need in a crunch

Event Day

- ✓ Arrive early—at least one hour in advance—to begin setting up.
- ✓ Welcome and greet any invited guests.
- ✓ Check lighting and temperature for families’ comfort.
- ✓ Make sure your membership table is in a prominent location and looks welcoming.
- ✓ Post welcome posters and directional signs to guide parents.
- ✓ Ask the school principal and/or PTA president to greet families and thank them for coming.
- ✓ Clearly indicate where and how parents are to sign in.
- ✓ Track all volunteer hours for recognition and planning purposes.
- ✓ If volunteers are students who need community service hours, complete and sign their required forms promptly.

Post-Event

- ✓ Send Thank You notes to everyone who participated and supported you.
- ✓ Turn in all paperwork, records, receipts, and funds.

Action Plan

Goal and Objectives	<i>List program goals & objectives here:</i>	
Next Steps	Who?	When?
•		
•		
•		
•		
•		
•		
•		
•		
•		

Ashburnham/Westminster Regional School District
BUILDING and FIELD USE FORM

Name of Organization: _____

Contact Person: _____ Contact Number: _____

Address: _____

Purpose: _____ Is this a non-profit organization: Y N

Activity Date: ____ / ____ / ____ Day of Week: _____ Time: _____ to _____

Prior Access Required: ____ / ____ / ____ Day of Week: _____ Time: _____ to _____

School Requested: Oakmont Regional High School Overlook Middle School
 John R. Briggs Elementary Westminster Elementary School Meetinghouse School

USER CATEGORIES

In order to allow for the rational prioritization of uses, and the fees therefore, the following categories will be established:

TIER 1

- ✓ Use by (1) municipal agencies or (2) programs operated by non-profit organizations for the benefit of Ashburnham-Westminster Regional School District or its students.
- ✓ Use by other non-profit tax-exempt organizations located in Ashburnham or Westminster, for non-commercial purposes, whose membership is composed primarily of Ashburnham-Westminster residents.
- ✓ Use by other non-profit tax-exempt organizations, for non-commercial purposes.

Verification that an applicant organization is a bonafide non-profit organization with tax-exempt 501 (3) status may be required at the time of application.

TIER 2

- ✓ All other uses. (As determined by the Superintendent of Schools and/or the Director of Facilities)

CUSTODIAL SERVICE: All users, regardless of category, will be required to reimburse the Ashburnham-Westminster Regional School District for any additional expenses incurred for custodial services. When the building is open, the Superintendent of Schools, or his/her designee shall determine if additional custodial staff is required. All groups shall be charged the actual rate of pay for additional custodian(s) assigned to work.

- ✓ When the building is closed, all groups shall be charged the actual rate of pay for custodian(s) assigned to work.
- ✓ All groups using the multi-purpose field shall be charged the actual rate of pay for custodian(s) assigned to work.
- ✓ Any set-up time needed/required will be charge accordingly.
- ✓ ~~In addition to actual hours of usage, groups shall be charged for any time needed for clean-up of area(s) after the group has departed.~~

100% NO TOLERANCE ZONE FOR ALCOHOL, TOBACCO OR DRUGS

Use of any of these products within the school buildings, the school facilities, on the school grounds or on school buses by any individual, including school personnel is prohibited.

AED LOCATIONS

Oakmont: Outside Nurse's Office / Gymnasium
Westminster Elementary: Lobby by Cafeteria/
Outside Nurse's Office

John R. Briggs Elementary: Front Lobby/Outside Nurse's Office
Overlook Middle School & Meetinghouse School: Front Lobby/
Gymnasium

BUILDING USE FEES - TIER 2

Required Staff (Tier 1 & 2)

1 Week Notice is Required

	Hourly Rate		# of Staff		# of Hours		Total
Custodian	\$40 (week)	X		X		=	\$
Custodian	\$55 (weekend)	X		X		=	\$
*AV Tech (required)	\$20	X		X		=	\$

Location	MHS Hourly Rate	WES Hourly Rate	JRB Hourly Rate	OMS Hourly Rate	# of Hours	Total
Classroom	\$10	\$10	\$10	\$10	X	= \$
Cafeteria	\$25	\$25	\$25	\$25	X	= \$
Gym	\$25	\$25	\$25	\$30	X	= \$
Library	\$15	\$15	\$15	\$15	X	= \$
Team Room				\$30	X	= \$
School Field			\$15	\$15	X	= \$

Oakmont Regional High School/Fields

Location	Hourly Rate		# of Hours		Total	Notes/Comments
Classroom	\$10	X		=	\$	(i.e. - # chairs / specific set-up)
von Deck Lecture Hall	\$15	X		=	\$	
Webber Conf Room	\$10	X		=	\$	
Cafeteria	\$25	X		=	\$	
Old Gym	\$25	X		=	\$	
Auditorium*	\$40	X		=	\$	
New Gym	\$30	X		=	\$	
Locker Room	\$10	X		=	\$	
Library	\$20	X		=	\$	
Lights	\$25	X		=	\$	
Baseball Field	\$15	X		=	\$	
Track	\$15	X		=	\$	
Summer Camps	\$100	X	Per day	=	\$	
Chair/Table	\$1 each	X	Per day	=	\$	

Additional Set-Up Requests

	Hourly Rate		# of Hours		Total	Notes/Comments
TV/VCR	\$10	X		=	\$	(i.e. - # chairs / specific set-up)
Mic./Sound System	\$15	X		=	\$	
AV/Computer/Video *	\$20	X		=	\$	

Sponsor's Signature / Date _____ / _____

Approved by School Principal / Date _____ / _____

Head Custodian / Date _____ / _____

Total Charges \$ _____ ** Subject to change due to additional coverage**

One Copy To: _____ Principal/Designee _____ Organization _____ Head Custodian _____ Supt. Office _____ Tech Dept.



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Deposit Notice

Name: _____ Date Submitted: _____

Phone: _____ Received By: _____

Program/Category: _____ Total Amount
(event, supplies...) _____ Deposited: _____

Cash Record

Check Record

\$20 X _____ Number of Checks: _____

\$10 X _____ TOTAL CHECKS: _____

\$5 X _____

\$1 X _____

\$0.25 X _____

\$0.10 X _____

\$0.05 X _____

\$0.01 X _____

TOTAL CASH: _____

- If depositing Checks, please complete and attach a Check Ledger along with corresponding checks.

- Deposits from programs or fundraisers should be submitted within one week of the end of the event.

- Deposits may be submitted to any PTA Board Member for delivery to the PTA Treasurer.

For Treasurer's Use Only

Category	Transaction ID	Deposit Date	Logged
Reimbursement Request			

Deposit Notice



Commonwealth of Massachusetts
Department of Revenue
Christopher C. Harding, Commissioner

mass.gov/dor

Letter ID: L1366233216
Notice Date: April 2, 2018
MA Taxpayer ID: 11398998



CERTIFICATE OF EXEMPTION



JR BRIGGS PTA
96 WILLIAMS RD
ASHBURNHAM MA 01430-1661



000140

Attached below is your Certificate of Exemption (Form ST-2). Cut along the dotted line and display at your place of business. You must report any change of name or address to us so that a revised ST-2 can be issued.

DETACH HERE



MASSACHUSETTS DEPARTMENT OF REVENUE

Form ST-2

Certificate of Exemption

JR BRIGGS PTA
96 WILLIAMS RD
ASHBURNHAM MA 01430-1661

MA Taxpayer ID: 11398998
Certificate Number: 1989531648

This certifies that the organization named above is an exempt purchaser under Chapter 64H, section 6(d) or (e) of the Massachusetts General Laws. All purchases of tangible personal property by this organization are exempt from taxation to the extent that such property is used in the conduct of the business of the purchaser. Misuse of this certificate by any tax-exempt organization or unauthorized use of this certificate by any individual will lead to revocation. Willful misuse of this certificate is subject to criminal sanctions of up to one year in prison and \$10,000 (\$50,000 for corporations) in fines. This certificate is non-transferable and may be suspended or revoked for failure to comply with state laws and regulations.

Effective Date: May 21, 2018

Expiration Date: May 20, 2028



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Cash Box Request

Requestor: _____ **Date Requested:** _____

Phone: _____

Program/Category: _____ **Total Amount Requested:** _____
(event, supplies...)

Handling Procedures:

1. Two people count the money before your event to verify the amount received
Approved By: _____
Date: _____
2. Checks should be made payable to JR Briggs PTA - Verify the legal line (longhand written)
(#1) Count In: _____
Date: _____
3. Separate all Cash from Checks
(#1) Count In: _____
4. All bills facing the same direction
Date: _____
5. Remove any staples
(#7) Count Out: _____
6. Count checks and complete Check Ledger, keep checks in order of listing and total the amount received
Date: _____
(#7) Count Out: _____
7. Two people count the money at the close of the event and complete the Deposit Notice
Date: _____
8. All money should be turned into the PTA Treasurer within one week of the end of the program, event or fundraiser
9. To protect our volunteers, the Cash Box may not be passed from one event chairperson to another event chairperson without prior consent of the Executive Board and completion of a Cash Box Transfer form.

For Treasurer's Use Only

Category	Check #	Payment Date	Logged
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Check Request

***** Please attach invoice if requesting bill payment *****

Payable to: _____ Phone: _____

Mailing Address:

Program/Category: _____ Total Amount: _____
(event, supplies...)

Reason for Check:

Annual Budget Year: _____ Approved at Meeting: _____

- Checks will be mailed to the address indicated above. For invoice payment, please list the Accounts Receivable address on the invoice.
- JRB PTA is tax exempt; please ensure you have provided your vendor with a copy of our tax exempt certificate and that no sales tax is reflected on the invoice.
- Checks are approved at the next general meeting, or executive committee meeting, whichever occurs first.

Board Approval Required:

Two board members must sign approval before reimbursement can be made.

Approved By: _____

Date: _____

Approved By: _____

Date: _____

For Treasurer's Use Only

Category	Check #	Payment Date	Logged
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Reimbursement Request

*****Original Receipts must be attached*****

Payable to: _____ Phone: _____

Mailing Address:

Program/Category: _____ Total Amount: _____
(event, supplies...)

Reason for Reimbursement:

Annual Budget Year: _____ Approved at Meeting: _____

- Checks will be mailed to you at the address indicated above.
- JRB PTA is unable to reimburse for sales tax. If a receipt is submitted with sales tax, reimbursement will be paid less the tax amount.
- All Reimbursement Checks are approved at the next general meeting, or executive committee meeting, whichever occurs first.

Board Approval Required:

Two board members must sign approval before reimbursement can be made.

Approved By: _____

Date: _____

Approved By: _____

Date: _____

For Treasurer's Use Only

Category	Check #	Payment Date	Logged
Reimbursement Request			