

Menlo School Parent Association

Grade-Level Team Budget & Spending Guidelines

The following are spending guidelines for all Grade-Level Teams (grades 6-12). These guidelines are in place for several reasons:

- *To help each grade-level team monitor its budget throughout the year;*
- *To increase the team's level of financial responsibility and accountability;*
- *To share budget management "best practices" across teams;*
- *And most importantly, to facilitate inclusivity across events by ensuring consistent, reasonable and sustainable spending within budget. Please refer any questions to the VP Parent Resourcing, MSPA Co-presidents, or MSPA Treasurer.*

PLANNING

Team leads: Share your budget with your team. Make sure everyone involved in planning an event knows the budget before they begin discussing event logistics. Use the grade level-specific budget plan provided to guide spending allocation between your grade-level events.

Additional events: MSPA funds should be used for events listed on your budget template. If you would like to make changes or plan additional events, please contact the VP Parent Resourcing or your MSPA Co-President in advance to discuss. MSPA expects the team to host those events identified in budget, but recognizes that the team may be asked to by the school to help organize additional grade level events or support student events. It is the MSPA's expectation those events will be supported financially by the school through the Student Activities office and that support is budgeted by the school.

Budget Reports: In November, February and May, MSPA Treasurer will distribute budget reports to each grade level team so teams know their actual spending compared to budget.

Staying on Budget: Budgets are set to provide resources for fun, simple events. If your plan does not fit within your budget, that is a strong indication you should simplify your plans. People remember conversations, not decor. The MSPA cannot reimburse overruns. Underwriting or donations to enhance events is strongly discouraged. If you think you might be over budget or want help managing underwriting offers, please don't hesitate to ask the VP of Parent Resourcing or the MSPA Co-Presidents.

Resources Page on Menlo Website: The [Event Resources](#) page has a wealth of information regarding planning events for the Menlo community. Please take the time to review the information and know what is available to you.

SPENDING

Paying Caterers and Service Providers: For tax purposes, catering and service invoices (regardless of dollar amount) need to be paid directly to a vendor or service provider by the MSPA. Plan on one week for a check to be issued by the MSPA Treasurer team.

Gratuity/Tips: Undocumented Gratuity up to a maximum of \$200 per event will be reimbursed by the MSPA. For larger amounts, the gratuity must be included and paid for through the final Catering invoice. Amount can be submitted on an expense form with a copy of a personal check (phone camera picture is fine). A reimbursement form without any supporting documentation (i.e., paying cash) is acceptable but strongly discouraged.

Alcohol & Beverages: Purchasing alcoholic beverages is not a budgeted or reimbursable expense for parent socials. Please ask for parent contributions for wine and beer using a signup sheet and remind attendees to bring their contributions right before the event. Unused alcohol and drinks can be returned to the buyer or saved for future parent socials.

Hired labor: For tax reasons, MSPA cannot pay for extra labor like bartenders, servers and valet parking attendants. Your caterer may include servers in their bill.

Gifts: As much as we appreciate their hard work, the MSPA does not pay for gifts to grade level team members.

Décor & Equipment: To minimize costs and waste, please look into resources that are free and available from the school: tables, chairs, lights, heaters, coolers and ice from facilities for on-campus events, and decorations, votives, and linens from the MSPA storage room. Contact MSPA VP Parent Resourcing to access items in MSPA storage. A list of available items is on the MSPA Resources page.

Volunteer Sign Ups: Please refer to the Event Resources page for information on what volunteer sign up applications are currently supported by Menlo.

Invitations: Please use an advertisement-free, electronic, emailed invitation. Paperless Post is Menlo's preferred provider. Please check with the Communications Chair about current policies before incurring any upgrade charges.

Expense reimbursement: Please submit all expense/receipts to MSPA Treasurer no later than 30 days following an event. All fall expenses must be submitted no later than January 15th. All spring expenses must be submitted by May 30, other than expenses incurred later than that, which should be submitted within 48 hours. This is to allow reimbursement to be completed before fiscal year end. [Reimbursement form](#) is available on the Menlo website as part of the Event Resources page.

Unused Budget: Unused grade-level funding is not carried over to the following school year.

HELPFUL HINTS:

The goal of the MSPA Parent Teams is to provide events for all parents in their grade with the goal of building welcoming inclusive parent communities through fiscally sustainable events. Order less food than you think you need. There is always a lot left over. We recommend ordering for no more than 75% of attendees. Typical attendee drop off before an event is 20% - 25%.

Please share information from your reimbursement requests with your team lead.

Although the individual event budgets are ample for simple, inclusive events, occasionally early events are more expensive than expected. If your early events cost more than expected, plan your spring social to consist of parent contributions or scale back to a shorter event with drinks and appetizers.

Use the list of previously hired caterers and food trucks on the Event Resources page as a starting point for finding vendors that can meet target per head budget guidelines. The MSPA already has W9s for these vendors. If you use a new caterer, please ask for their W9.

Encourage parents to volunteer a shift as bartenders, servers, and to set up and tidy up after events. Parent participation increases the sense of community.