

## Menlo School Parent Association (MSPA) Committee Budget & Spending Guidelines

*The following are spending guidelines for all MSPA committees (grades 6-12). These guidelines are in place for several reasons:*

- *To help make sure that each committee has a good sense of its budget throughout the year;*
- *To increase the committee's level of financial responsibility and accountability;*
- *To share budget management "best practices" across committees;*
- *And most importantly, to facilitate inclusivity across events and activities by ensuring consistent and reasonable spending. Please refer any questions to your VP liaison, the MSPA Co-presidents or the MSPA Treasurer.*

### **PLANNING**

1. **Chairs:** Share your budget with your committee. Make sure everyone planning an event knows the budget before they start spending.
2. **School Funded Events:** If your event is funded partially or entirely by the school but the MSPA is the organizer, please reach out to both your school contact as well as the MSPA Treasurer to confirm dollars allotted and any special spending restrictions (e.g., school funds only pay for food at the event).
3. **Budget Reports:** At any time, please reach out to the MSPA Treasurer to receive a budget report so you know your actual spending compared to budget to date.
4. **Staying on Budget:** Budgets are reasonable limits for fun, simple events and activities. The MSPA cannot reimburse overruns.

### **SPENDING**

5. **Event 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. Page contents are updated at the start of each new school year.
6. **Paying Caterers and other Service Providers:** For tax purposes, ALL catering checks (regardless of dollar amount) need to be paid by the MSPA. For other vendors, always ask for a check to be cut directly by the MSPA if possible – MSPA Treasurer will issue checks weekly.
7. **Hired labor:** For tax reasons, MSPA cannot pay for extra labor like bartenders, servers and valet parking attendants.
8. **Gifts:** As much as we appreciate their hard work, the MSPA does not pay for gifts to committee chairs or members.
9. **Décor & Equipment:** First, always consider campus spaces as your venue. If you need decorations for your event or activity, please look into resources that are free (e.g., tables, chairs, lights, heaters, coolers and ice from facilities for on-campus events; decorations, votives, and linens from the MSPA storage room) to minimize costs and waste. Contact MSPA VP Parent Resourcing to access items in MSPA storage.

10. **Volunteer Sign Ups:** Volunteer sign-ups are a great way to stretch a budget, though please note that any school-wide or grade-wide sign up for financial donations requires prior approval by the MSPA co-presidents. Please refer to the Event Resources page for information on what volunteer sign up applications are supported by Menlo.

11. **Invitations:** Paperless Post is the preferred platform for Menlo. Upcharges should not be incurred other than when there is a charge for requesting RSVP's. For class-wide events, please consider using Paperless Post Flyer without add-ons and distributing it as a link in an email. You can seek advice from the MSPA communications chair on how to minimize invitation costs. Note that it is an MSPA policy not to use online platforms with advertisements.

## **REIMBURSEMENT**

12. **Expense reimbursement:** Please try to 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 15. All spring expenses must be submitted no later than June 15. Reimbursement form is available on the Menlo website as part of the Event Resources page.

13. **Unused Budget:** Unused budget is not carried over to the following school year.

### Helpful Hints:

- Any time you submit an expense, copy your committee chair or make sure they know the amount of the expense.
- Encourage parents to volunteer to be helpers, servers, etc. Getting everyone involved only increases the "sense of community."
- MSPA realizes that parents may wish to underwrite certain aspects of events. We discourage underwriting. If dollars were spent on critical elements (e.g., more food, not enhanced decorations), please keep a record if it might be important when planning the budget for the following year.