Chapters serve as the fundraising and community building entity for you respective schools, often hosting events such as Fun Run, annual community nights, carnivals, etc. As a Chapter, you are required to adhere to the policies required by the Foundation. This is a check list to help you know what is expected and to support your event success.

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| **Be sure to:** |
| □ Prepare a detailed budget including Income and Expense by Event (should have been part of the annual budget submitted at the beginning of the year to the Foundation). Update your budget regularly and report financials intermittently at officer meetings. Remember that Chapters must follow purchasing guidelines. If the items will be owned by the school (e.g. equipment, sports uniforms), funds must be granted to the school and purchased by them. |  |
| □ Make sure all activities are acceptable. |  |
| □ Make sure to request a W-9 from vendors. |  |
| □ Determine whether you’ll need to collect credit card payments. If you’ll be processing credit card payments directly make sure you are set up for \_\_\_\_ though the Foundation. |  |
| □ All marketing/promotional materials must list your chapter as: “[Chapter Name], a Chapter of the Mapleton Education Foundation and include our logo. |  |
| □ Submit a description of the event in writing and request Insurance from the District at least two weeks prior to the event. |  |
| □ Read your contracts! Make sure you know what you are signing.  □ Know the difference between a **contribution** and a **non-tax deductible earned income.** Be sure to issue acknowledgements for contributions. Income that involves a fee paid for a good or service if not tax deductible. |  |
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| **Permissible Activities:** |

**Make sure all activities for your event are within insurance coverage.**

While Chapters are included in the basic coverage, some activities are not covered. Cost of additional insurance can be high and must be covered by the Chapter.

|  |  |
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| * Animals (other than house pets) | * Rodeos sponsored by the Insured |
| * Carnivals with mechanical rides | * Any event more than 500 people at any one time |
| * Aircraft and Motorcycles runs and automobile rallies | * Plus more…check with the Foundation |

**Make sure all activities for your event are compliant to MPS and Foundation Policies.**

Events may never include the following:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| * Political Rallies | | | | | | | | | | * Events including contact sports | | | | | |
| * Firearms | | | | | | | | | | * Fireworks | | | | | |
| * Alcohol on school properties (even   as a Silent Auction item) or where  students are present. | | | | | | | | | | * Raffles/Gaming (we do not hold a license) | | | | | |
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| **Financial Considerations:** | | | | | | | | | | | | |
| • Administer the Dual-Control process when reconciling deposits for the event and follow the  usual Pay Voucher process.  • Chapter must provide receipts for financial and in-kind donations over $250, however it is  best practice to issue receipts for all contributions.  For complete information please refer to the Chapter Policy Manual. | | | | | | | | | | | | |
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| **Name of Event:** | | | |  | | | | | | | | |
| **Date:** | | | |  | | | | | | **Time:** |  | |
| **Location:** | | | |  | | | | | | | | |
| **Reserved on:** | | | |  | | | | | | **With:** |  | |
| **Address:** | | | |  | | | | | | | | |
| **City/State/Zip** | | | |  | | | | | | | | |
| **Contact Name:** | | | |  | | | | | | | | |
| **Contact Phone:** | | | |  | | | | | | **Cell Phone:** |  | |
| **Contact Email:** | | | |  | | | | | | | | |
|  | | | | | | | | | | | | |
| **Primary Audience:** | | | |  | | | | | | | | |
|  | | | |
| **Budget Amount:** | | | |  | | | | | | **Category:** |  | |
| **Approval by:** | | | |  | | | | | | **Date:** |  | |
| **Internal Partners:** | | | | | | | | | | | | |
| □ | Other: | | | | | |  | | | | |
| □ | Other: | | | | |  | | | | | |
| □ | Other: | | | |  | | | | | | |
| **External Partners:** | | | | | | | | | | | | | |
| □ | Other: | | | |  | | | | | | | | |
| □ | Other: | | | |  | | | | | | | | |
| □ | Other: | | | |  | | | | | | | | |
| □ | Other: | | | |  | | | | | | | | |
| □ | Other: | | | |  | | | | | | | | |
| |  |  |  |  | | --- | --- | --- | --- | | **Primary Sponsor:** |  | **Amount:** |  |   **Volunteer:** | | | | | | | | | | | | | |
| □ | Event organizer: | | | | | | |  | | | |
| □ | Chairperson: | | | | | | |  | | | |
| □ | Communications: | | | | | | |  | | | |
| □ | Day of set-up: | | | | | | |  | | | |
| □ | | Other: |  | | | | | | | | | | |
| □ | | Other: |  | | | | | | | | | | |

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| **Media Materials/Items:** | | | | | | |
| □ | Printed Materials | | | | | |
| □ | Signage | | | | | |
| □ | Emails   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | |  | | | | | | | |
| □ | Media post | | | | | |
| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | □ | |  |  |  |  | | --- | --- | --- | --- | | Subject: |  | Date: |  | | | | | | |
| □ | Website   |  |  | | --- | --- | | □ | Calendar Event Created | | □ | Event page | | □ | Photos | | | | | | |
| □ | Power point for event | | | | | |
| □ | Other: | | |
| □ | | Other: |  | | |
| □ | | Other: |  | | |
| □ | | Other: |  | | |

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| **Post Event Items:** | | | | | | | | |
| □ | Data entry into LGL   |  |  |  | | --- | --- | --- | | □ | Sponsor(s): | | | □ | | In-kind: | |  | | □ | | Other: | |  | | □ | | Other: | |  | | | | | | | | |
| □ | Invoices paid:   |  |  |  |  | | --- | --- | --- | --- | | □ | Event Space: | | | | □ | | Printed Materials: | | |  | | | □ | | Other: | | | |  | | □ | | Other: |  | | | | | | | | | | | |
| □ | “Thank you” Acknowledgments   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | □ | Sponsors: | | | | | | □ | | Volunteers: | | |  | | | □ | | BOD: | | |  | | | □ | Other: | | | | | | □ | | Other: |  | | | | | □ | | Other: | |  | | | | | | | | | | |
| □ | | Post Event Data:   |  |  |  |  |  | | --- | --- | --- | --- | --- | | □ | Attendance: | | | | | □ | | Cost: | |  | | | □ | | Other: |  | | | | □ | | Other: | |  | | | | | | | |
| □ | Other: | | | |
| □ | | Other: | |  | | |
| □ | | Date for Next Event: | | | |  |
| □ | | Feedback for next event that can be incorporated: | | | |  |
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