



Belle Vue
Primary School

**Parents & Friends Association
(PFA)**

**Event and
FUNdraising
Handbook**

This document explains the purpose of the School's PFA, its procedures for managing an event/activity that involves the collection of money or making payments external to the school and the way in which the PFA's activities links into the overall Governance Framework of the school including School Council,

1. PFA – Background and Purpose

1.1. Purpose

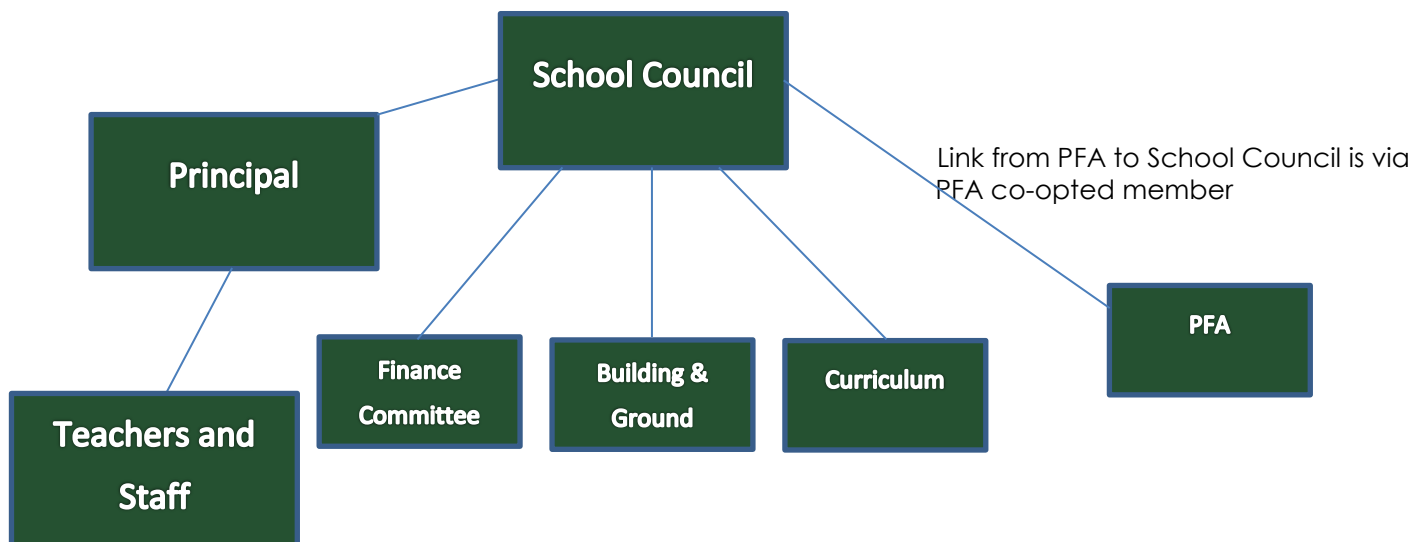
Whilst not a formal Committee, Belle Vue Primary School's Parents and Friends Association (PFA) is a group of school community parents who undertake to assist the school by co-ordinating and undertaking various social and fundraising events from time to time and as outlined and approved by school council in the form of the Annual Events Calendar, which is approved by School Council at its November meeting for the following year and updated from time to time.

PFA activities are for the following purposes:

- Social – to enhance the engagement of the school community as a whole with social activities that aim to maximise participation by families and/or students; and/or
- Fundraising – to conduct events or activities which contribute to the school's financial resources to contribute to education programs and/or specified capital projects as approved by School Council as part of its annual budget process.

The PFA is open to all school community parents who are willing to assist from time to time or for a single activity or event. New ideas (not already provided in the Annual Events Calendar) will be sought and to the extent that individuals are willing to act as leads and subject to the PFA Co-ordinator obtaining approval from school council, the School actively supports new social and fundraising initiatives. Any individual involved in PFA activities agrees to undertake those activities in accordance with the two key purposes of the PFA outlined above and to always act in the best interests of the school community as a whole.

1.2. School governance framework:



1.3. PFA representative on School Council (PFA co-ordinator)

The School Council may, at its discretion agree to co-opt a person to act as the PFA representative to School Council in accordance with its Standing Orders. Such co-opted person is not an elected member of Council and therefore nominations are not required as for elected members. A resolution of a majority of councillors is required to pass the co-opting of a PFA representative.

The role of the co-opted PFA representative on Council is:

- To provide a report at each School Council meeting, updating on PFA events and issues arising in relation to these events.
- To act as a liaison between PFA and School Council
- To act as Class Rep Co-ordinator for PFA communications that Class Reps are asked to email out to families.
- To seek volunteers at the start of each year (when classes are known to act as Class Representatives).
- Maintenance of the PFA email account.
- Establishment and maintenance of the class contact lists.

1.4. Parent Class representatives***

The School has put in place Parent Class representative (Class Rep) for each class. Below is an outline of the types of role that a Class Rep may undertake:

- Organise parent get togethers for class so parents can meet
- Distribution of class contact lists
- Pass on PFA reminders regarding upcoming events
- Organise informal introduction/welcome for new families to Belle Vue during the year
- Any other matters as agreed with class room teacher from time to time
- Feel free to contact them if you are unsure about any upcoming events

At the beginning of each year, the PFA co-ordinator will seek volunteers to act as class representatives.

The class reps will engage with the classroom teacher to agree what, if any assistance the classroom teacher may require from time to time from the Class Rep, this may include sending classroom reminders on behalf of the teacher. Providing that emails sent from the Class Rep do not replace formal notices provided by the School.

The PFA co-ordinator will provide the Class Rep with a class listing with email addresses and one without email addresses. The class rep will provide parents in their class with a listing of contact information as supplied from families EXCLUDING email addresses. The Class Rep agrees to keep confidential email addresses supplied to them and will only send emails to their classes (either PFA reminders or other class information) using those emails in blindcopy (BCC).

**** Class Rep do not necessarily need to participate in the PFA and the class representative role is not a PFA role in itself, however the PFA (via the PFA Co-ordinator) will utilise the Class Reps to email out PFA notices and reminders as required or considered appropriate from time to time.*

2. PFA – Events and Activity Guidelines

As outlined above, a PFA activity may be for the purpose of social, fundraising or both.

2.1. Social events and activities

PFA volunteers will be sought to run specified activities during the year either individually or jointly with other volunteers. Responsible individuals will engage with the co-opted PFA member on school council to keep it informed of progress and any issues or changes that would materially affect the purpose of the activity.

Responsible individuals will as required, liaise with the Business Manager or PFA Co-ordinator to provide notices in the newsletter, team app or emails via the Class Room Representatives.

Co-ordinators of PFA activities will maintain a directory with all communications, notices, etc and at the end of the activity or end of the school year will provide to the Business Manager a copy of that directory for filing in the PFA folder at the school – this will assist with succession planning.

2.2. Major fundraising events

A major fundraising event is an event where the potential net proceeds to the School is greater than \$3,000.

For those events identified on the annual event calendar as being major fundraising events, one or more PFA volunteers will be sought to act as event co-ordinators.

Any “themes” for fundraising events must be approved by the Principal.

Any major fundraising event must seek volunteers from the full school community to join a working group to assist with the planning and management of the event.

The event co-ordinator will provide status updates to the PFA representative to enable them to keep the school council fully informed of progress.

The event co-ordinator will maintain a directory with all communications, notices, budgets, timetables etc and at the conclusion of the event will provide to the Business Manager a copy of that directory for filing in the PFA folder at the school – this will assist with succession planning.

Refer section 4 for the Event/Activity Finance and Security Guidelines.

3. Communication & Use of technology

The PFA will utilise the following methods to promote events, solicit donations and communicate both within and outside the school community to assist in its co-ordination and management of events:

- Specified email addresses (ie. Pfa.bvps@gmail.com, eventsatbellevue@gmail.com)
- Team app
- School newsletter
- Letters seeking donations
- Certificates of Appreciation
- External ticketing providers (ie. Trybooking)

3.1. Email addresses

In relation to the use of emails – for any email where Bellevue, Belle Vue, BVPS or any other reference to the school or the school's PFA is inferred approval must be obtained from the School Principal to establish the email.

Where any such email exists, it will be utilised for the purposes for which it is established and for no other purpose.

The PFA co-ordinator and the Business Manager must be advised of the following: email address, username and/or password. A list of those individuals with access to the email will be provided to the School via the Business Manager.

To the extent that individuals with responsibilities for emails leave the school, then for security purposes, the Business Manager or PFA co-ordinator may determine to change the password and the updated information will be provided to interested individuals.

3.2. Internal communication

The Event co-ordinator will provide notices to the Business Manager for physical distribution or inclusion in the newsletter from time to time in relation to PFA events. In relation to newsletter notices, the timing will be by close of business on the day prior to a newsletter being issued or in the event of a physical notice, at least 2 days notice will be provided.

A team app updates will be provided to the PFA Co-ordinator with the following:

- An image or photo
- A narrative of what is to be included in the team app update

Any reminders or notices to be emailed out to classes via the Class Reps MUST go through the PFA co-ordinator.

Posters and flyers around the school will be provided to the School Principal for review beforehand and the Business Manager will assist in printing as and when required.

3.3. External communication, advertisement and donors

For all communication on behalf of the School, the PFA or on letterhead being distributed outside of the School community the following will occur:

- **Advertising Event/Activity** *Allow enough time for Principal approval for all advertisement with school association/logo before advertising (i.e. 3-4 days)
- **Newsletter/App** – Updated on a Wednesday pm. Email all information (JPEG or PDF) that is to be posted in the newsletter to belle.vue.ps@edumail.vic.gov.au
- **School/Local Businesses** – Posters that can be placed around the school and at local businesses to advertise to the community. Email: PDF or JPG to belle.vue.ps@edumail.vic.gov.au for printing. Principal approval required for external distribution
- **Letters to Businesses or Individuals asking for support or donations** – Email or deliver to Business Manager and Principal for approval and printing prior to distribution.
- **Real Estate Boards** - These can be commissioned through local Estate agents at no cost. Installation and position to be approved by the Principal.
- **Certificates of Appreciation** - will be prepared for all parties providing donations to the School as approved by the School Principal.

For all major fundraising events, the event co-ordinator must keep a record of parties providing donations to the school. The School Council and School Principal may at their discretion decide it is not in the best interests of the school to accept a donation for an event or the school should it be determine that there is reputational risk in doing so.

Donations provided to the School are not tax deductible to the donor and clear representations by event co-ordinators to this effect is required to avoid misrepresenting the deductibility of services or goods donated including sponsorship.

3.4. External ticketing providers

If ticketing is relevant to an event, all ticketing and money handling is to be done by a reputable **online** ticketing site (Recommended – Trybooking.com).

The School has an established account with Trybooking and full financial control for this remains with the school. The PFA co-ordinator will provide any individual who is a co-ordinator for an event the Trybooking login information but no changes are to be made to userids or passwords without the consent of the Business Manager.

The contact email for the Trybooking website must remain as pfa.bvps@gmail.com

Alternative online options may be considered if they suit your event needs better. This allows for minimum interruption to office staff and allows for internal controls by eliminating the need for additional cash/money handling, however the approval of the School Council may be required via the PFA co-ordinator. An alternative ticketing site will only be considered where there is a segregation and control of the banking arrangements by the school administration only.

Refer also Finance Guidelines below for transferring of funds from ticketing sites.

4. Event/Activity Finance and Security Guidelines

1. Contact the Business Manager

Minimum four weeks prior to your event, notify the Business Manager that you will be managing an event/activity and will require banking/orders/payment or other assistance. If possible provide the expected dates that you will need this help. If you are new to managing finance-type events ask for any additional advice or information that may be helpful to the smooth running of your event (i.e. list of school's current suppliers, recommended local businesses etc.)

2. Ticketing

If ticketing is relevant to your event you must use Trybooking which is the School's approved provider, using the school's existing account unless otherwise approved.

Money must be transferred throughout the course of the event's ticketing process to ensure that at no time more than \$200 remains in the ticketing system's account. The school's official account is the nominated account for Trybooking and controls exist to ensure that any administrator cannot change the banking information.

Note: until the event has taken place, Trybooking require that a balance remains in the account however as soon as the event has taken place the event co-ordinator is to transfer the remaining balance in full to the school.

3. Registering events held at the School with Victoria Police

A week prior to any major after hour event held at the School, the event co-ordinator must register the event with the Victoria Police via the Safe Parties website at the school. The main PFA email address must be used and with consent, the Principal's details provided.

The website to complete this is located at

http://www.police.vic.gov.au/content.asp?Document_ID=9566

4. Raffles (where the total prize value exceeds \$5,000)

Before fundraising by means of raffles or bingo can be undertaken, permission and instructions must be obtained from the Victorian Commission for Gambling Regulation, Level 5, 35 Spring Street, Melbourne 3000. .

The website for the authority is located at www.vcgr.vic.gov.au . (Please allow adequate time)

5. Contractual arrangements with suppliers

Any contractual obligations with suppliers must be approved and signed by an authorised representative of the School following approval of the Principal.

6. Supplier's Payment **

It is preferable that all suppliers used have a current account with the school. If you are wishing to use a supplier that the school does not currently engage with please seek prior approval from the Business Manager. Always ask suppliers e.g. restaurants, food providers, stationery and equipment about when they expect payment. You should advise suppliers that a tax invoice is required for payment (a tax invoice provides details of the supplier's ABN and the GST charged). The office will raise a payment against the tax invoice.

Note...most Venues/restaurants for large functions require a deposit and then final payment on the night/function so you need to have received the invoice for the deposit and have given this to the office at the time of booking and then another for the balance at least 4 working days prior to the event. If the event is cancelled, please contact the office immediately.

7. "Small Amount" purchases <\$20.00 **

If you need to make a small purchase (e.g. \$5 for ribbons, paper, etc.) make sure you get a Tax Receipt (includes ABN) from the shop or supplier. Remember - no tax receipt = no payment. Receipts along with details to be recorded on the outgoing money register need to be provided to the Business Manager to obtain re-imburement. These re-imburements need to be claimed within 1 month of the expense being incurred in order for all expenditure to be correctly reconciled post event. If you are at all unsure about making small purchases, check with the office.

8. Larger purchases >\$20.00 **

Please talk to the Business Manager as an official School Purchase Order is required. Business Manager may be able to fund purchases at Coles Supermarket with the School Account card with approval.

9. "Floats" max \$400 **

For some functions you will need to arrange a "float". Float maximum is \$400 to provide for enough change at your event. This will be provided by the office in a locked cash box. Please advise the Business Manager at least 7 days prior and arrange a suitable time for float collection prior to your event. You will need to sign for the float and you should count it before leaving the office to ensure its accuracy. You should return all cash and slips, in the locked cash box back to the office immediately after the event, for sign in.

10. Counting Money **

Ensure at least 2 people do the counting and it is done on the event premises. One signs and the other co-signs as to the cash value. The cash is to be returned to the Business Manager on the next available business day. Note: If the cash is required to be held out of school premises overnight, an agreement with the Business Manager needs to be agreed upon in advance.

11. School access and keys

For some events held on school grounds, the event co-ordinator will be required to obtain a set of school keys. Engagement with the Business Manager will be required at least 5 business days in advance and will include information regarding security systems. The keys must remain in the control of the person signing them out at all times until they are signed back in.

12. Term 4 Events

Please note if you are organising an event close to the end of the school year, all expenditure is required to have been reimbursed and reconciled before the end of that school year for inclusion in the current year's financials. No extension is permitted.

13. Post Event Follow up:

Thank you notes and appreciation certificates are to be provided to contributors. These are to be issued in a timely fashion. It is recommended for larger events that a post evaluation is completed in regards to the success of your event.

14. ** Compliance with School's Cash Handling Policy

All event co-ordinators will seek to obtain a copy of the School's current cash handling policy (as approved by School Council from time to time) at the commencement of planning for an event. Compliance with this Policy must be ensured at all times.