

Annual PTA funding/budget Guidelines

The Meiklejohn Elementary School PTA's budget is proposed and voted on at the first general membership meeting of each academic year. The budget process begins several months prior to this and therefore any requests for changes or additions to the budget are needed well in advance of the conclusion of the previous academic year.

Unless the PTA Board decides otherwise or a program was a one-time event, programs that were included in the annual budget in one academic year will receive funding in subsequent years without a new budget request being required. As long as the PTA continues to successfully raise money and increase membership, our goal is to increase annual program budgets at a rate that corresponds with the population growth of our school. New program expenses and related budget requests as well as any requests for an increase in budget will be considered by the PTA Board in the Spring of the academic year that precedes the year for which funds are desired.

Compliance with the following timeline for requests will ensure that requests for budget consideration will be given adequate consideration. Planning ahead is critical for the budget process.

- **March 1** – If you have a request for funding for a NEW program or a NEW expense, these requests for consideration for inclusion in PTA budget for the following academic year should be provided to the PTA President and Treasurer by March 1.
- **May 15** – If you have a requests for a budget increase for an EXISTING program/expense for the following academic year, these requests should be provided to the PTA President and Treasurer by May 15.

The PTA Board may still address funding requests throughout the academic year. However, once the budget is set and approved by membership such requests can be difficult to approve. In determining the budget, the PTA Board's priorities will remain with existing, successful programs before creating new programs.

Special Giving

What is Special Giving? Through a variety of programs and events held throughout the year, the PTA raises money to support its program budget. Funds raised that are not needed to meet the PTA's expense budget are directed toward special programs, activities, resources, projects, training, etc. at the end of the school year ("special giving"). At the annual membership meeting, typically in May, the PTA Board makes a proposal to the membership for how it believes special giving funds should be granted. Once the proposal is made to PTA members, a membership vote will

decide on the allocation of special giving funds. A special giving request is different than a budget request in that it is a one-time request as opposed to a request for an on-going program/expense. Any request that is received after the budget has been approved by membership is automatically a special giving request.

Budget and Special Giving Funding Priorities

The PTA Board strives to fulfill many worthwhile funding needs and desires at Meiklejohn Elementary School. The PTA Board reviews requests from members and staff as well as conducts its own research to develop a list of ideas for special giving opportunities. As stated above with respect to the annual budget, funding of existing programs that remain successful will be given priority over new programs. The PTA Board will make every effort to follow the below priorities for determining how it believes funding (special giving and budget) should be allocated, knowing that sometimes exceptional circumstances arise and deviating from these priorities may be warranted.

Although not all requests can be made within the timeframe set forth above, there may be a higher likelihood of availability of funds if the requested timeframe is followed and proposals are in line with our high priorities.

High Priorities

To fund programs, resources, training, projects and the like that will:

- benefit a large portion of students;
- improve the learning environment at school;
- provide educational resource materials;
- benefits multiple students over the course of multiple years;
- support our teachers' and licensed staff development;
- advance our schools' student achievement goals;
- ensure a continued welcoming and safe environment at our school;
- meet unexpected needs that are otherwise not funded through the school district

Other considerations

- Is the request for funding limited to a specific class or grade or for the benefit of a small portion of students?
- Could the program be funded through the school's budget?
- Could the program be funded through other sources such as a grant or in-kind contributions?

What to do if you have a funding/special giving request

Provide the following information in writing to the PTA President and Treasurer by the deadlines set forth above. You may email the information to: president@meiklejohnpta.com and treasurer@meiklejohnpta.com.

1. A description of the program, event or activity you want to be funded by the PTA and the amount of funding requested.
2. An explanation of whether this will be an on-going expense or a one-time expense.
3. An explanation of who benefits from the program, event or activity and how. If possible, include details to explain how it may have a long-term benefit. Include an explanation for how the success of the program, event or activity will be determined.
4. An explanation of what type of staffing and/or volunteer support is needed to make the proposed program, event or activity work. Explain what your role will be, if any, in running the program, event or activity. Explain what steps have been or will be taken to ensure appropriate staffing and volunteer support will be secured. Please be very specific.
5. A description of any other resources (other than PTA funding) that are necessary for the proposed program, event or activity to take place. For example, do you need the use of a classroom(s), tables, computers, paper, supplies, photocopies, etc.?
6. Where possible, a written explanation from a teacher or staff member explaining why he or she supports your proposal.