

Framework for Annual PTA Budget Review 2012-2013

Each spring Chabot's Parent Teacher Association (PTA) reviews proposals and agrees on an annual budget for the coming school year. The following is a framework intended to provide a process for evaluating proposals that come before the PTA that require funding, for both new and existing programs. The process includes a timeline to provide for preliminary review of the proposals and a set of predefined criteria for uniform and impartial evaluation of the proposals. **Every Committee or person requesting funding from the PTA must submit the appropriate Budget Form (Short or Long – see Budget Request Guideline/Criteria item #5 below.)**

PTA Budget Review Committee

1. The application form and guidelines developed by the Budget Committee and approved by the PTA will be made available in the school office, and on the Chabot website. Notices will be posted in the Chabot Broadcast.
2. The Chabot PTA Budget Review Committee (Budget Committee) will oversee the annual PTA budget process. The Budget Committee will be made up of PTA members who do not submit proposals.
3. It is the Budget Committee's job to develop a balanced budget via review, discussion, feedback and iteration with those submitting proposals, the PTA executive board, and the PTA general association.
4. The Budget Committee may meet with each committee chair(s) to review the budget request. The Budget Committee and applicants may agree to modify proposals to meet the needs of the community during the review process.
5. The Budget Committee may modify the timeline outlined in this framework as long as the membership votes on the final recommendation by the June PTA meeting.

Budget Request Guidelines/Criteria

1. The primary criterion for a PTA budget request is that it be consistent with the mission (goals) of the PTA and the school.
2. The proposal should strive to benefit the maximum number of persons (students, parents, etc.) in the group that the proposal is designed to serve.
3. Proposals will be accepted from any PTA member including faculty, staff, parents or caregivers.
4. Each proposal must clearly specify a single PTA member who will be responsible for overseeing the program, activity or project being funded.
5. Programs that pay for specialists or that are requesting annual budgets in excess of \$3,000 and are not in the "PTA Administration" categories, are required to complete the "LONG FORM." All other applicants requesting funding should complete the "SHORT FORM."

Accountability

1. The treasurer will maintain a list of all approved programs and expenditures and the member responsible for each.
2. The Applicant or Committee Chair will report to the PTA on an ongoing basis, as the program or expenditure begins and ends.

Timeline:

(Note: bold-faced items are deadlines for those submitting proposals)

JANUARY	
1/19	Forms published
FEBRUARY	
2/6	Proposals for 2012-2013 due, delivered to the PTA President's inbox
2/8-2/17	Budget Committee meets to review proposals, first pass at numbers, and develop questions and/or feedback to submitters
MARCH	
3/6	PTA Board meeting: present preliminary numbers <i>EAC meeting: review proposals / discuss gaps</i>
3/9	2nd draft of proposals due (where necessary)
3/12-3/16	Budget Committee meets to review 2 nd drafts, re-work numbers
3/20	PTA General Association meeting: high level overview of budget process
3/23	Final drafts of proposals due
3/26-3/28	Budget Committee meets to review final drafts, re-work numbers
APRIL	
4/3	Draft budget presented at PTA Board meeting
4/17	Draft budget presented at PTA General Association meeting for community input
4/18-4/30	Budget Committee meets to re-work numbers based on late changes
MAY	
5/1	PTA Board meeting: Budget Committee presents "final" budget
5/15	PTA General Association meeting: Budget Committee presents final budget for vote of Approval
5/18	Final versions of proposals due, reflecting approved budget amounts