

## **Overview of Annual PTA Budget Process FY 2016-2017**

Each spring Chabot's Parent Teacher Association (PTA) reviews proposals and agrees on an annual budget for the following school year. This overview provides a process for evaluating budget 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 a written Budget Proposal accompanied by a supporting Budget Worksheet.

### **PTA Budget Review Committee**

1. The application form and guidelines will be made available in the school office, and on the Chabot website. Notices will be posted in the Chabot Broadcast and via flyers sent home.
2. The Chabot PTA 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.

### **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.

### **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**

- Mon, Feb 8: PTA Budget Committee meets with Principal Jessica Cannon to align funding areas
- Fri, Feb 12, 2:50pm: DEADLINE for submitting budget proposal to PTA Treasurer
- Wed, Feb 17: PTA Budget Committee meeting #1
- Wed, Mar 2: PTA Budget Committee meeting #2
- Wed, Mar 9: PTA Budget Committee meets with Principal Jessica Cannon to solicit feedback
- Tue, Mar 22: PTA Budget Committee meeting #3
- Tue, April 5: Budget presented to PTA Board
- Tue, April 19: Budget presented to PTA General Association

Please contact Danny Kramer, PTA Treasurer, at [danny.kramer@gmail.com](mailto:danny.kramer@gmail.com) if you have any questions.