



EDGEMONT PTSA



PTSA Fund Request Procedures

Approved: July 24th, 2007
Amended: May 27th, 2015
Amended: February 2016
Amended: July 26, 2016

PURPOSE

The purpose of the Procedures is to set forth the policies and guidelines for PTSA Funding Requests including those for PTSA Committees. This will help to make this process efficient and to better document the PTSA Fund Requests. The PTSA Executive Board, the PTSA ACE Committee, or the PTSA STEM Committee shall review and approve all fund request proposals relating to school and student programs and activities.

POLICY

1. Types of funds granted by the Edgemont PTSA

Edgemont PTSA funds will support student learning and education enrichment by meeting the needs of teachers, staff and students. The organization will fund new unique or innovative programs or resources including instructional materials, school trips to museums, curriculum enhancers, Arts-related activities and supplies; and more. The PTSA will not fund items already in the school budget.

2. Funds Request Forms

The PTSA has two funding request forms available on the EHS website under "Staff Quick Links" which are accessible via the drop down menu for "Departments" then "Teaching/Learning".

- a. ACE Funds Request Form. Use this form to request funds for any Arts-related program or activity.
- b. PTSA Funds Request Form. Use this form for all other requests including those for STEM (Science, Technology, Engineering and Math).

3. Business Office Procedures

All Funds Requests shall be processed in accordance with Business Office Procedures.

- a. The fund request shall be submitted to the Principal for approval before being sent to the PTSA Executive Board or ACE Committee and shall be voted on as soon as possible.
- b. Once approved by both the Principal and the PTSA, the fund request shall be added to the BOE Agenda as a gift from the PTSA for acceptance by the BOE. The BOE agenda is set at least one week prior to the BOE meeting.
- c. After a PTSA gift is accepted by the BOE, the PTSA will write and deliver the check to the district. A check cannot be written by the PTSA until the Board of Education votes to accept the gift.

4. Specific policies

- a. All PTSA funds must be spent during the school year in which they are gifted. Gifts cannot be carried over from one school year to the next.
- b. All equipment must be purchased by the School District so it can be covered by the school's insurance policy.
- c. Funding for buses must also be accepted by the BOE.

- d. Requests for field trips, club trips, conventions and competitions that require students to travel shall include a \$10.00 minimum contribution from each student attending.
 - e. When resources allow, the PTSA will cover registration fees with the exclusion of meals included in such fees. The \$10.00 minimum student contribution listed above will still be required.
5. Procurement and payment of gifts requiring BOE approval
It is District policy that all gifts to the school district must be presented to and accepted by the BOE prior to the gift being ordered. Once approved by the BOE, the PTSA will contact the requestor to let him/her know when the funds are available to the district office so that the item(s) can be ordered. A purchase order form, available in the Principal's Office, must be filled out by each requestor and will be sent to the District Business Office for processing. All requests must be processed through the Business Office. Checks are written approximately twice a month in the Business Office so submit requests with ample time to have your requests voted on, approved by the BOE, and processed by the District Office.
6. Policy on Sales Tax
All purchases made using a personal credit card that require BOE approval and reimbursement by the PTSA should be made using the District's tax-exempt number if purchased in New York State. Purchases that do not require acceptance by the BOE, such as hospitality expenses, should be made using the PTSA's tax-exempt number. Reimbursements for sales tax will not be made.
7. Policy regarding Speakers
New York State law requires that all speakers who work at Edgemont for more than 5 school days during a school year must be finger-printed, no matter who is providing the funds for them.

PROCEDURES

- 1. A PTSA request for funds form must be completed in full.
- 2. Include a detailed list of items to be purchased.
- 3. Include a detailed itemized list of costs/fees. The "total project cost" must be stated including tax, shipping/delivery fees for any inventory item (textbooks, supplies, equipment), and travel expenses for guest speakers. Please see item 6 "Policy on Sales Tax" above.
- 4. Specify the purpose of the request and its benefits (e.g. benefits to the school/students, learning tool, educational material and/or supplies).
- 5. Include the number of students involved in or affected.
- 6. If the funding request is in association with a special event, include all event specifics such as date, time, location, number of chaperones needed (if applicable)

Please direct any questions to the PTSA President at edgemont.ptsa.pres@gmail.com