

**DRAFT Guidelines
For Financial Assistance
With PTO Projects**

The Board of Education appreciates the valuable contribution that PTOs make to their respective schools, often raising funds to complete projects that enhance our schools beyond what the District can plan for at the time. The District recognizes that there are limitations as to how much fundraising a school PTO can accomplish in a given year and that project budgets may exceed annual fundraising capacity. Historically, the District has provided individual school PTOs with financial assistance for specific projects in the form of monetary contributions, in-kind contributions (materials and labor) or no-interest loans. The following guidelines are meant to put the District's practice of supporting PTO Projects into written form to easier facilitate collaboration on future projects.

- Prior to submitting a request for assistance, a school PTO must obtain the written approval of the school's principal.
 - If the PTO Project involves technology, additional approval is required by the District's Chief Information Officer. All requests addressing the purchase of software must have a signed copy of the *District's Technology Software Adoption Form*. All requests addressing the purchase of hardware must have a signed copy of the *District's Technology Hardware Purchasing Form*.
- A school PTO must complete a formal request for assistance by Dec. 1 in order to secure project approval and funding for the following school year.
 - This is necessary so that the District can include expenditures for this project as a part of its budget development.
- All formal requests for support of a school PTO Project must include a fundraising plan that details how the PTO plans to secure funding.
 - The timeline for raising funds for specific projects is limited to three school years.
- The District, at its discretion, will make a "no-interest loan" available to PTOs to support their respective projects.
 - The amount any the loan will be limited to 75 percent of the total cost of the project.
 - The term of any loan will be limited to three years.
- In addition to a loan, a school PTO may request one of the following means of additional support from the District:
 - Monetary Contribution
 - The amount of any monetary contribution will be limited to 15 percent of the total cost of the project.
 - In-kind Contribution of Materials and Labor
 - The value of any in-kind contribution will be limited to 25 percent of the total cost of the project.
- A committee consisting of the Superintendent (or designee), the Chief Financial Officer, the Director of Facility Services and the Board of Education Representative(s) to PTO Council will review and approve assistance for school PTO requests for projects with a total cost of less than \$250,000.
 - The committee may approve or deny any and all requests for assistance.
 - Priority consideration may be given to projects at schools who have not previously sought assistance or who have not requested assistance in recent years.
- Request for assistance for projects with a total cost of more than \$250,000 must be approved directly by the Board of Education.
- Once a project is approved, PTOs must have secured (raised) 25 percent of the cost of a proposed project before starting work or receiving support (as listed above) from the District.
- **Decisions to fund projects will be made on an annual basis and are discretionary. The establishment of these guidelines does not guarantee that the District will be in a position to assist with projects every year nor does it establish a line item in the District's budget for supporting PTO projects.**

