

Sunset Ridge/Middlefork School PTO Board Report

Thank you for taking time to complete this report. This information will be kept as an electronic file on the website and used solely to hand down to the next person responsible for chairing this position. We value your experience and knowledge and know the incoming chair will as well. Every little bit helps!

Submitted by: Sandy Norbot

Board Position and Year held: President Elect, 2022-2023 school year

Approximate Budget: \$10,000

Key Responsibilities:

This Board Report denotes the **PTO Gifts program** process, which is the responsibility of the President Elect. See By-Laws for general President Elect duties.

PTO Gifts guidelines are posted on the [PTO Website](#).

Communication with the D29 community is very important, because this is the PTO’s largest budget item. Obtain help from Social Media Chair.

Applications can be submitted by Teachers, Staff, Parents, or Students

| Month | Responsibilities (bullet format, as many as needed) |
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| September | <ul style="list-style-type: none"> • Figure out your timeline. See 2022 timeline below as an example. December PTO meeting is when you will announce the recipients of the PTO Gifts grants. Back up from there, and schedule the PTO Gifts Committee meeting, likely by the end of November, with the following contacts/committee members: <ul style="list-style-type: none"> ○ Superintendent ○ Principal, SRS ○ Principal, Middlefork ○ Chief School Business Official ○ School Board Representative ○ PTO President ○ PTO President Elect • Determine Application period • Work with principals to specify the date they will distribute the applications, along with the due date, either back to admin or directly to President Elect. PRINCIPALS SHOULD REVIEW APPLICATIONS, OR BE AWARE OF WHAT THE STAFF MEMBER IS REQUESTING, BEFORE THE APPLIATON IS SUBMITTED • Update PTO Gifts application (electronic PDF format) with current dates • Update PTO Guidelines with current date • Provide principals with updated application and guidelines • Update PTO Website – update text with current timeline, upload current application and guidelines |

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| | <ul style="list-style-type: none"> • What is the budget for this year for PTO Gifts? May change year to year based on fundraising. |
| October | <ul style="list-style-type: none"> • <u>Application period is open!</u> • Ask principals to distribute application and guidelines to staff • Communications to Community explaining the program and notifying that they can submit applications <ul style="list-style-type: none"> ○ Monthly Matters PTO Newsletter ○ ParentSquare – you create content, but sent by principals or D29 Director of Tech ○ Instagram & Facebook – multiple posts during the application period • Applications from staff will trickle in. Review them up front and ask applicant any questions. • Shipping costs should be included in the application • TAX SHOULD NOT BE INCLUDED IN QUOTES. PTO does not reimburse for dollars spent on taxes. School and PTO is tax exempt. • Create “at a glance” spreadsheet including application data. Great way to track summary of items requested, as well as costs of items compared to the budget. Template here - Spreadsheet template |
| November | <ul style="list-style-type: none"> • Ensure applications were vetted by administration. • Post applications on PTO Website along with images before the November PTO Meeting • PTO members in good standing are encouraged to review the applications and send President Elect feedback via email. • Communications to Community announcing feedback request: <ul style="list-style-type: none"> ○ November PTO meeting ○ ParentSquare – you create content, but sent by principals or D29 Director of Tech ○ November Monthly Matters PTO Newsletter ○ Instagram and Facebook (multiple times) • Remind PTO Gifts Committee about upcoming meeting. May want to send them link to PTO Website and/or spreadsheet for them to review prior to meeting • PTO Gifts Committee meeting: <ul style="list-style-type: none"> ○ Use PTO Zoom account if decide to hold virtual ○ Have individual applications and spreadsheet ready to present. ○ Review each item. Discuss and include feedback from community. Come to consensus. ○ Good idea to keep some money left over from budget, in case costs have fluctuated since initial application or unexpected shipping costs. FOR 2022-2023 SCHOOL YEAR, we kept \$476 as a cushion. One of the grants went over by \$570! But because some of the other items ended up being less their original approved cost, we still came in under our \$10,000 budget. May want to either leave more of a cushion, OR ensure that applicants reach out to vendors to obtain shipping costs at the time of submitting the application. |

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| | <ul style="list-style-type: none"> • Chief School Business Official and business office will work with applicants in making purchases. PTO Treasurer will then reimburse the school district. • Inform applicants, both recipients and those denied, of the committee's decisions. CC Chief Business Official, School Principal • Post approved gifts on PTO Website |
| December | <ul style="list-style-type: none"> • Report approvals at December PTO Meeting! |

Timeline for 2022 PTO Gifts program

- Sept 29 – Send applications to principals. Ask them to send ParentSquare blurb (that you write) on Monday Oct 3rd
- October 3rd - applications distributed to staff and community
 - Notify CIA (Civics in Action) PTO rep. This person may have opportunity to work with students for applications.
- October 4 – Blurb to Communications Chair for PTO Monthly Matters. Also to Social Media chair for Instagram/Facebook posts.
- Oct 11th - PTO Meeting, announce that the application process has begun
 - COMMUNICATIONS: ParentSquare, Instagram, Facebook, all with link to PTO website page with application
- October 28 - Applications due, evaluated by administration
- November 4th – due back to me from applicants or administration, post applications online on PTO Website
- November 7th - PTO Meeting, announce applications are online and request feedback by Nov 18
 - COMMUNICATIONS: ParentSquare, Instagram, Facebook, all with link to PTO website page with submissions
- December 2nd – PTO Gifts Committee meeting
- December 7 – post approved gifts online on PTO Website
- December 13 – PTO Meeting, announce PTO Gifts Grants recipients
 - COMMUNICATIONS: ParentSquare, Instagram, Facebook, all with link to PTO website page with recipients!

| Name | Email | Phone | Misc. Notes |
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| Sandy Norbot | sandynorbot@yahoo.com | 847-826-8630 | Happy to discuss! Any past PTO president has completed this process as well |
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