



West Lab PTO

Parent Teacher Organization



NEW PROJECTS – Application Form

Date: _____

Title of Project or Event: _____

Requested by: _____ Admin Staff Committee (circle one)

Chair/Co-Chairs/Contact Person	Cell phone	Email
_____	_____	_____
_____	_____	_____

Description of Project and Goals: _____

Timeline for the planning and execution of the Project: _____

Budget for the Project/Event: The budget shall be verifiable, and shall include anticipated expenses, anticipated revenue streams, and potential public and private partners.
Please attach a detailed budget in addition to stating the total allocation request below.

Requested Total: \$ _____

To be filled out by Henry S. West Laboratory School PTO Board of Directors:

Application received by: _____ Date: _____ Status: _____



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NEW PROJECTS (Policies and Procedures)

Funding New Requests

New project funding outlined below includes timelines, policies and procedures that align with the bylaws of the West Lab PTO and best practices of a 501(c)(3) not-for-profit organization.

Policies:

Funds raised by the West Lab PTO shall be dedicated first to funding the ACT Fund / One Aide Per Grade, estimated at \$90,000.00 annually, and second to funding operating costs, insurance, bookkeeping, and discretionary funds for small events under \$1,000.00, estimated at \$10,000.00 annually. Surplus funds beyond this total of \$100,000.00 annually may be allocated by the West Lab PTO Executive Board (the "Board") to support projects, events, or other undertakings ("Project" or "Projects") approved by the BOD for the following academic year or as the Board may deem necessary and appropriate.

Priority shall be given to Projects not eligible for funding by the Miami-Dade County Public School District.

Procedures:

A formal application for funding of a Project must be made to the Board in writing. The application can be a full presentation or one-page document. The application must comply with all guidelines otherwise established by the Board and West Lab administration, and must also contain the following:

1. The proposed working title of the Project.
2. A thorough description of the Project and its goals.
3. The names of two individuals who shall serve as Co-Chairs of the Project.
4. A statement as to whether a committee may be required to assist in the planning and execution of the Project, and if so, the proposed size and makeup (parents, teachers, students) of the committee.
5. A proposed timeline for the planning and execution of the Project.
6. A proposed budget for the Project. The budget shall be verifiable, and shall include anticipated expenses, anticipated revenue streams, and potential public and private partners.

Consideration and Approval

The Board will consider Project applications in the order received, unless the Board in its discretion determines that consideration of applications in some other order is warranted. An application may only be approved by majority vote of all members of the Board. The Board will provide written notification to applicants of the approval or denial of their application. The Board may at its discretion invite one or more of the Co-Chairs of the proposed Project to appear in person before the Board to answer any questions the Board may have regarding the Project. A failure to appear at the requested time and date shall constitute grounds for denial of the application without further consideration.



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Timeline:

March 1 - 31:

Applications for new Projects must be submitted, in writing, to the co-secretary of the Board for consideration.

Applications must be emailed, or date stamped no later than March 31.

April:

PTO Treasurer reconciles profit and loss (P&L) statement.

Treasurer presents draft budget for next academic year to the Board at April Executive Board Meeting.

If there are any estimated surplus funds beyond budget needed, the funds may be earmarked by the Board for new projects, including but not limited to administration requests, supply needs, library upgrades, technology support, and hardware and facilities improvements.

May:

Estimated budget for next academic year will be adopted by the Board.

Final surplus funds will be officially allocated for the following year. August

Projects awarded funding in the previous academic year must present updated, detailed, and verified budgets with line items for final adoption by the current Board.

Award

- Surplus funds from annual fundraising will be applicable for projects presented by and to the Board.
- All Projects awarded \$1,000.00 or more must have a Board member appointed on the committee as member and liaison. The liaison will be a current officer of the Board and will be appointed by the Board in its sole discretion and will attend or call in to meetings.
- The Co-Chairs of the Project shall keep the Board liaison updated in writing regarding the status of the Project on a weekly, monthly, or quarterly basis with special consideration and if Board member is unable to attend a meeting in person or by phone (update schedule to be set concurrently with Project approval).
- Meetings regarding the Project should give notice of such meetings at least seven (7) days prior to the meeting to all members and Board Liaison. Failure to keep the liaison updated shall be grounds for suspension or revocation of Project approval.
- Email meeting recaps to be forwarded or summarized by committee chair to members and cc board monthly or as needed.
- Liaison and co-chairs will respectfully send project implementation dates, once confirmed by Principal and Board of Directors, to person in charge of calendar management so that it gets inputted into PTO, web and school calendar.
- For all expenditures of \$1,000.00 or more, even if contained within a larger approved Project budget, a minimum of three (3) proposals, quotes, renderings, or mock-ups (as may be applicable) for the expenditure must be obtained and submitted to the Board for review and approval for transparency and fiscal responsibility.
- The Board may impose additional conditions or requirements on any award as it may deem appropriate and necessary.



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Award (Continuation)

- All approved Projects must stay within the amount listed on the budget at the time of Project approval for each line item. Any request to deviate from this requirement can be submitted in writing to the Board together with a proposed amended budget and an explanation for the requested deviation(s). The amended budget must be approved by majority vote of the Board.
- Payments and/or reimbursements will be made by check upon receipt of pre-approved invoices and bills that fall within the budgeted line item amount and are otherwise within the approved budget, timeline, and specifications for the Project.

Implementation

- Upon formal approval by the Board, Projects shall proceed within their approved timeline, budget, and specifications.
- All events, activities, and fundraising related to an approved Project must follow the current application, request forms, and approval processes established by the Board and West Lab staff and administration, including activation dates, merchandise, sales, fundraising, communication, and marketing. The application process described above does not exempt a Project from this requirement.
- All school communications must follow current application and approval processes established by the Board and West Lab staff and administration.
- No vendors may take monies directly.
- All monies brought in by a Project due to Project events, activities, or fundraising shall be general PTO funds. Projects may not engage in any fundraising of any kind which brings monies into the Project directly instead of into the general fund of the PTO. A violation of this rule shall be grounds for immediate revocation of Project approval.
- The Board may, upon majority vote, modify, suspend, or revoke Project approval at any time.
- The Board may, upon majority vote, remove, suspend, or replace any Project Chair or Co-Chair, upon a showing of good cause for the same.