

2019-2020 LA ENTRADA PTA BUDGET WORKSHEET

INCOME	2019-2020	2018-2019 ACTUAL*	2017-2018 ACTUAL	Notes
General Membership Donations	\$45,000	\$45,057	\$60,432	Changed from \$100/student to \$100/family in 2018-19
Winter Service Project Donations	3,000	-	-	To support the Winter Service Project
8th-Grade Graduation Party Donations	10,000	9,500	7,670	To support the 8th-Grade Graduation Party
Library Donations	3,500	3,465	4,779	To support the La Entrada Library
Used Book Fair Sales	3,000	1,937	5,714	To support Field Trips and In-House Enrichment
School Picnic Donations	1,850	2,041	-	To support the School Picnic
Other Income	400	889	1,956	Investments, donations from outside vendors
TOTAL INCOME	\$66,750	\$62,889	\$80,551	
EXPENSES				
FAMILY-SCHOOL ENGAGEMENT				
Family-Focused Programs				
New Parent Coffee	\$350	\$350	\$269	
Total Family-Focused Programs	\$350	\$350	\$269	
Staff-Focused Programs				
Staff Appreciation Events/Meals	3,200	2,790	3,756	Maximum allowed per CA state PTA is 5% of total expenditures
Total Staff-Focused Programs	\$3,200	\$2,790	\$3,756	
General Family-School Engagement				
School Picnic	6,500	6,154	-	
8th-Grade Graduation Party	13,500	13,000	16,000	
Complimentary Membership Dues	2,800	2,708	-	
District/PTA Leadership Engagement	350	375	\$300	Every-other-year for LE/LL Holiday Luncheon or District Convocation
Total General Family-School Engagement	\$23,150	\$22,237	\$16,300	
Total Family-School Engagement	\$26,700	\$25,377	\$20,325	
CHILDREN'S WELL BEING				
**ABC Readers (Project Cornerstone)	1,500	-	-	
**District Wellness Committee	500	-	540	
**Safe Routes to School	500	-	-	
Lunchtime Enrichment Clubs	1,500	1,055	1,200	
Total Children's Well Being	\$3,500	\$1,055	\$1,740	
COMMUNITY BETTERMENT				
Winter Service Project	9,000	7,000	-	\$2K increase paid for by direct donations; need \$1k more outside funds
Used Book Fair	200	200	158	
**Special Olympics	200	-	-	
Total Community Betterment	\$9,400	\$7,200	\$158	
PARENT EDUCATION				
**District Parent Education Series	2,500	2,500	2,000	
Total Parent Education	\$2,500	\$2,500	\$2,000	
SUPPORTING EDUCATION				
**Field Trips and In-House Enrichment	15,000	15,000	15,000	See budget narrative for more info.
GeoBee	300	289	390	
**Library Donation	3,500	3,500	350	Expense will depend on Library Donations Income
MathCounts	350	-	-	New PTA Program for 2019-2020
**New Teacher Supplies	500	250	1,250	\$250 per new teacher
Visual Arts Showcase	250	251	336	
Spelling Bee	250	150	433	
STEM Fair	500	500	482	
Total Supporting Education	\$20,650	\$19,940	\$17,759	
GOVERNANCE & ADMINISTRATION				
Operating expenses	3,500	2,080	5,256	2017-2018 included dues
Total Governance & Administration	\$3,500	\$2,080	\$5,256	
Other/Unallocated Expenses	500	500	1,620	
TOTAL EXPENSES	\$66,750	\$58,652	\$48,858	
NET OPERATING INCOME	\$0	\$4,237	\$31,693	

*As of May 29, 2019 (or projected as of year end)

**Funding only (non-PTA program)

BREAKDOWN BY PRIORITY

PRIORITY	Budget	% Total	Volunteer Hrs	% Total
Family-School Engagement Programs/activities that bring families together to create a positive school culture <i>Leopard's Spot, PTA Portal, School Picnic, Staff Appreciation, 8th-Grade Graduation Party</i>	\$26,700	40%	279	9%
Supporting Education Programs that give students access to a comprehensive education <i>Field Trips and In-House Enrichment, GeoBee, Library Fund, MathCounts, New Teacher Supplies, Visual Arts Showcase, Spelling Bee, STEM Fair</i>	\$20,650	31%	175	6%
Community Betterment Projects with other community agencies supporting children <i>Used Book Fair, Winter Service Project</i>	\$9,400	14%	290	10%
Children's Well-Being Ensuring students' nutrition, health, safety, fitness and general well-being <i>District Wellness Committee, Hot Lunch, Lunchtime Enrichment</i>	\$3,500	5%	1,941	65%
Parent Education Resources that equip families to support students' growth and development <i>Parent Education Series</i>	\$2,500	4%	-	-
Governance & Admin	\$3,500	5%	300	10%
TOTAL	\$66,250	100%	2,985	100%

2019-2020 LA ENTRADA PTA BUDGET NARRATIVE

Explanation of LE PTA Budgeting Priorities

The purposes of the La Entrada PTA (as stated in the bylaws) are:

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community
- To raise the standards of home life
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth
- To promote the collaboration and engagement of families and educators in the education of children and youth
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

The California State PTA distills down these purposes to five funding areas:

1. Family-School Engagement
2. Children's Well-Being
3. Community Betterment
4. Promoting Parent Education
5. Funding for Education

The La Entrada PTA structures our programs/activities and budget on these priorities.

Description of Budgeting Priorities*

The PTA enhances **Family-School Engagement** by providing programs, activities and events for families to actively participate in school life. By bringing families together on campus, the PTA creates a welcoming, accessible and inclusive school culture and has a positive impact on student outcomes and school performance.

To boost **Children's Well-Being**, the PTA focuses on ensuring students' nutrition, health, safety, fitness and general well-being so they can be successful learners.

The PTA pursues **Community Betterment** when it collaborates on special projects with other community agencies that work to improve children's lives.

Promoting Parent Education means supporting comprehensive, accessible programs that equip families with information, strategies and tools to support their student's emotional, physical and intellectual growth and development.

Funding for Education: The La Entrada PTA helps support adequate funding for our school's programs so that every student has access to a comprehensive education and the opportunity to reach his or her full potential.

Membership Dues

In 2018, the PTA Executive Board voted to recommend to the General Membership that it revise its dues structure in order to welcome all LE families and staff into PTA membership regardless of their financial circumstances. Upon ratification of the bylaws by the General Membership, the PTA covers regional, state and national dues at no cost to all families who opt in to PTA membership. The PTA will also continue to collect critical program funds via the school registration process on a voluntary donation basis rather than a membership fee-per-child basis.

Field Trips and In-House Enrichment

2018-2019 experiences included:

- 4th grade: field trip to San Juan Bautista
- 5th grade: American Revolution Simulation, Colonial Day
- 6th grade: Ancient Artifacts, Jump Rope Queen, Archeology Speaker
- 7th grade: field trip to CA Academy of Sciences or Exploratorium
- 8th grade: Storyteller (2 visits--before DC trip and end of year)

8th-Grade Graduation Party

Goals:

1. To support a festive, memorable event that celebrates graduating students and engages their families in an important milestone.
2. To underwrite the cost of the event so *all* students may attend (tickets not required).
3. To throw a party that feels relatively consistent year over year.
4. To create a budget that is reasonable (not excessive) for a PTA-sponsored event.
5. To dedicate an appropriate proportion of PTA general operating funds to this event, which serves only a segment of the La Entrada community.

Background

- For years, the 8th grade graduation party was organized and financed by 8th-grade families. In 2017, the school administration asked the PTA to take ownership over the event in an effort to meet the above goals.
- The 2017-2018 and 2018-2019 PTA Executive Boards came to the following conclusions based on graduation funding and expenses (both at LE and other local middle schools) as well as PTA best practices:
 - A \$13,000 budget meets the objectives above and is in line with graduation spending by other middle school PTAs
 - In prior years, 8th-grade families have donated funds through personal (not PTA) accounts. Recognizing and formalizing these PTA donations will allow the board to better account for and control the expenses year over year.
 - Families of 8th-grade students have eagerly supported this event financially. Leveraging this enthusiasm allows the PTA to protect the percentage of general operating funds spent on the 8th-grade graduation party by making up the difference with earmarked donations. Any funding received over the budgeted amount for these restricted donations will divert general funds back to the PTA.
 - The 8th-Grade Graduation Party Chair and Committee should work closely with the Family-Engagement Chair and PTA Executive Committee on budgeting/spending practices to ensure predictable, transparent, and trackable spending.