

Guide to Use of PTA Funds

Student Enrichment, Grade-Level Allocation, Specialist Allocation, and Special Funding Requests

The Island Lake PTA Board and members are proud to support the Island Lake community. We hope this guide will help teachers and staff members understand how to use PTA funds available to them. All necessary forms may be obtained from the IL PTA website or Treasurer and submitted via email to the or to the PTA mailbox. Because PTA is a nonprofit and cannot reimburse sales tax, tax-exempt forms may be requested from PTA Treasurers. We encourage you to contact us at any time with questions or if you need help accessing or requesting funds: islandlakeptatreasurer@gmail.com.

To ensure the IL PTA adheres to guidelines provided by the National PTA and remains in compliance with our IRS nonprofit 501(c)(3) status, the PTA Board and members must:

- Use funds raised only for purposes approved by its members through the budgetary and amending process
- Refer to the mission of the IL PTA (“To be a powerful voice for all children, a relevant resource for families and communities, and an advocate for the education and well-being of every child”) when considering appropriate uses of PTA funds
- Dedicate the majority of PTA funds to items and programs that will directly benefit children
- Ensure anything paid for with PTA funds will supplement, not supplant, curriculum
- Request that all purchases funded by the IL PTA stay with the school building if the requesting staff member discontinues employment at Island Lake

Examples of what PTA <i>can</i> provide funds for	Examples of what PTA <i>cannot</i> provide funds for
<ul style="list-style-type: none"> ● Book bins ● “Brain break” materials ● Child health and safety programs ● Family involvement activities and events ● Minor playground equipment (hula hoops, chalk, balls) ● Parent education ● Photo printing ● Programs and events for students ● Rewards for students ● Special project supplies for a grade-wide seasonal project ● Supplies for holiday parties 	<ul style="list-style-type: none"> ● Capital improvements such as purchase/repair of windows, doors, lighting, carpet ● Equipment maintenance contracts ● Field trips and field trip transportation ● Furniture ● Gifts to a specified family or individual ● Janitorial and cleaning supplies (brooms, mops, soap, paper towels, vacuums) ● Office equipment and supplies (ink/toner, copy paper, pens, pencils) ● Personal-use items for teachers/staff ● Playground equipment for which PTA could be held liable (swings, slides, climbing structures) ● Technology and presentation equipment ● Textbooks and adequate curriculum materials and tools

Student Enrichment Funds

What is it?

Student Enrichment funds are included in the annual PTA budget for the purpose of supplementing and enriching students' classroom experiences not covered by school or district budgets. Appropriate purchases may include special class project supplies, holiday/class party supplies, photo printing, student rewards or incentives like stickers and bookmarks, books to supplement classroom libraries, and other consumables that might need to be replenished annually.

What is available and who is eligible?

Funds are determined based on FTE status for staff members. Paraprofessionals do not receive Student Enrichment funds but may submit Special Funding Requests.

What is the process for using these funds?

PTA cannot guarantee reimbursement, so if you are unsure whether PTA funds can cover something specific, please refer to examples at the beginning of this document or check with the Treasurer prior to making purchases. After making purchases, complete the Request for Payment/Reimbursement form, which includes an authorization from your building Administrative Assistant. Reimbursements will only be made for the current school year. Please submit all completed forms and receipts within 30 days of purchase or by May 1st, whichever is earlier.

Grade-Level Allocation and Specialist Allocation

What is it?

Grade-Level Allocation and Specialist Allocation funds are included in the annual PTA budget for the purpose of supporting teachers and specialists as they supplement and enrich students' school experiences at the grade level not covered by school or district budgets. These funds differ from Student Enrichment funds in that the purpose is to encourage collaboration and community building within grade levels or specialist disciplines through activities or events that all students in a grade level experience and benefit from. Examples of appropriate use may include a first grade family game night, a second grade carnival, supplies for a craft that each class in a grade level will complete during a holiday party, a special STEAM activity that each class in a grade does on Fridays, supplemental materials for a thematic unit that rotates through each class in a grade, or a book for each kindergartner at the end of the school year.

What is available and who is eligible?

Funds are determined based on the number of students served; dollar amount per student served will be included in a letter to teachers near the start of the school year when student enrollment numbers are nearly finalized and as the PTA budget allows. Paraprofessionals do not receive Grade-Level Allocation and Specialist Allocation funds but may submit Special Funding Requests.

What is the process for using these funds?

PTA cannot guarantee reimbursement, so if you are unsure whether PTA funds can cover something specific for a grade level, please refer to examples at the end of this document or check with the Treasurer prior to making purchases. After making purchases, complete the Request for Payment/Reimbursement form, which includes an authorization from your building Administrative Assistant. Reimbursements will only be made for the current school year. Please submit all completed forms and receipts within 30 days of purchase or by May 1, whichever is earlier.

Special Funding Requests

What is it?

Because the IL PTA has benefited from the generous donations of IL families and the community, we are able to consider Special Funding requests in addition to previously approved budget items. Like Student Enrichment, Grade-Level Allocation, and Specialist Allocation funds, Special Funding must also be used for the purpose of supplementing and enriching students' classroom and school experiences not covered by school or district budgets.

What is available and who is eligible?

The amount of Special Funding available varies year to year and is directly related to excess funds available after the PTA operating budget has been finalized and approved by the general PTA membership. Special funding requests should only be submitted after Student Enrichment and Grade-Level Allocation and Specialist Allocation funds have been exhausted. Staff members, teachers, and paraprofessionals may submit Special Funding requests.

What is the process for requesting these funds?

Complete the Special Funding Request form to initiate a request. Most requests are voted on at a general membership meeting, and the requester may be asked to present the request at a meeting. The PTA Executive Board reserves the right to approve or deny requests between general meetings when special circumstances or an impending deadline are involved. If a request is granted, the requester is notified and may then make approved purchases. Finally, the original form with all sections completed and receipts/invoices attached should be submitted to the Treasurer, who will then send a reimbursement check.

Considering Appropriate Uses of PTA Funds

The PTA Board will partner with school administration as needed to determine appropriate use of funds. Where applicable, the following questions will be used to review use of Student Enrichment, Grade-Level Allocation, Specialist Allocation, and Special Funding Requests:

1. Does the request support the mission of the IL PTA (to be a powerful voice for all children, a relevant resource for families and communities, and an advocate for the education and well-being of every child)?
2. If it's a Special Funding Request, are Student Enrichment, Grade-Level, and Specialist funds for the requesting person/group already exhausted?
3. If it's a Student Enrichment request, how does it supplement or enrich students' experiences in a specific classroom?
4. If it's a Grade-Level Allocation or Specialist Allocation request, how does it encourage collaboration and community building through an activity or experience that benefits all students within a grade level or specialist discipline?
5. Is there currently enough money to fund the request?
6. How much funding has this person/group been granted this fiscal year?
7. Where applicable, does the purchase (for Student Enrichment, Grade-Level Allocation, and Specialist Allocation) or request (for Special Funding) meet the standards below?
 - a. Benefits a significant percentage of students
 - b. Supplements rather than supplants curriculum
 - c. Has longevity
 - d. Has an academic focus or builds community
 - e. Enhances student experience at school
 - f. Promotes the school-home relationship
 - g. Is not normally or typically meant to be funded by the school district (e.g., text books or other items unavailable due to building or district funding shortages)