

Mountain School PTA

Budget Policies & Standing Rules

Updated May 2019

The purpose of this document is to communicate historical intent of the various PTA fundraising activities and expenditures to incoming PTA officers, new Mountain staff members, and PTA members. It can be used as a guideline for the future and should be voted on by the general membership. Standing Rules should be used in conjunction with the PTA bylaws when making PTA budgetary decisions.

(Initial version written by Mary Hall, Summer 2007)

DONATIONS

Amazon Smile

In 2015 the PTA, as a registered non-profit, qualified to participate in the AmazonSmile program. The Amazon Foundation donates 0.5% of eligible AmazonSmile purchases to the charitable organizations selected by customers. Mountain families are encouraged to elect Mountain PTA as their charity. Quarterly, donations are deposited electronically into the PTA account.

<http://smile.amazon.com/ch/85-0448519>

Box Tops for Education

Historically Box Tops are collected by the PTA. Funds are deposited into the PTA general fund. In the spring of 2007 it was removed from the budget. A PTA volunteer continued to coordinate the program, but the check was given directly to the Mountain School secretary. Funds no longer passed through the PTA.

In 2017 the school asked the PTA to manage Box Tops again and a line item was added to the budget. Box Top disbursement checks are made out to Mountain School. Both the school and the district office have given the PTA permission to deposit these checks into the PTA account to reduce paperwork. Earnings for the 2017-2018 school year from Box Tops were \$1,100.

In 2019 clipping Box Tops will be phased out and replaced with a smartphone app system.

Casa Mesita Grant

Beginning in January 2013, the Casa Mesita Thrift Shop began making a monthly donation of \$600 to our PTA and each PTO in the Los Alamos Public School District. These funds come from the sale of the Casa Mesita group home and income from the Thrift Shop. Casa Mesita Board of Directors indicate that this grant will continue as long as funds are available. 2015-16 the donation decreased to \$400/month. 2017 the donation decreased to \$200/month.

Contact Roberta Irwin, Casa Mesita Board of Directors.

JJAB (Juvenile Justice Advisory Board)

See 6th Grade Ropes Course

LANB

Circa 2009, PTA asked LANB for sponsorship. Initially \$1000/year was donated by LANB, some years expressly for tutoring programs. By 2015 LANB sponsorships decreased substantially community-wide. In 2017 LANB warned their community support would change to make local non-profits less reliant on their donations. It's recommended to ask for LANB funding in January when their new budget comes into effect.

Contact Jillian Bartley, LANB Marketing Coordinator. 662-1010. jillianb@lanb.com

LANL Giving

United Way originally handled donations from the LANL Employee Giving Campaign. LANL employees can designate support to non-profits (Mountain School PTA) through payroll-deductions either bi-weekly or one time giving. The Campaign enrollment period is in the Fall, usually October. In 2018 CyberGrants took over disbursement from United Way. Giving and matching checks are sent quarterly - January, May, August, October.

Contact: Joanna Gillespie, Los Alamos National Laboratory, Community Partnerships Office
Phone: (505)667-9716 joannag@lanl.gov>

Details below provide by LANL Community Partnership Office:

Triad will match a portion of each employee's giving to charitable 501(c)(3) nonprofits that are based in the seven counties in which the majority of Laboratory employees reside (Los Alamos, Rio Arriba, Santa Fe, Taos, San Miguel, Mora, and Sandoval), and in Eddy County where the Laboratory also has a presence. Organizations that do not have a charitable 501(c)(3) designation or are based outside of these counties are not eligible to receive corporate matching funds. Triad is focusing their funding in this way to better target the greatest needs in our region. This policy change means that some organizations that have been matched in the past will not be eligible for corporate matching funds this year, such as congregations or schools that are not designated 501(c)(3) charitable organizations, or 501(c)(3) nonprofits that are outside the geographic areas mentioned above. As a result, most churches do not qualify for a corporate match from Triad. In order for a donation to be matched, the church must be both a 501(c)(3) organized as a charitable organization, and file the IRS Form 990 annually. Through the Employee Giving Campaign employees can continue to make donations to any U.S.-based 501(c)(3) nonprofit, or other exempt organization such as a church or school, but their donations will not be eligible for a match unless they meet all of the conditions mentioned.

If you have any questions about this policy change or the Laboratory's Employee Giving Campaign in general, please contact us by emailing give@lanl.gov, or calling 505-665-4400.

LANL Volunteer Match (a.k.a. Vecinos Volunteer Program)

LANL donates money to qualifying 501(c)(3) organizations as an incentive for employee volunteerism. LANL employees who volunteer in the community can designate Mountain School PTA to receive funds; \$100 for 100-499 volunteer hours, \$500 for 500 or more hours. Hours for previous calendar year are tabulated in April and funds are allocated in June-July.

<http://www.lanl.gov/community-environment/community-commitment/volunteer-match-sponsors.php>

Smith's Inspiring Donations

Money goes directly to Mountain School not PTA. In 2017 the school earned over \$5,000 from this program. PTA can help promote.

www.smithsfoodanddrug.com/account/communityrewards/

Organization Name: **Los Alamos Public Schools Mountain Elementary.**

Organization Number: **YCo90**

UNSOLICITED DONATIONS

Donations from unsolicited sources or donations made during PTA membership drive.

Fundraising

Art to Remember/Art Teacher Funds

PTA will hold funds for the Art Teacher earned during the "Art to Remember" fundraising drive. This fundraiser is organized by the art teacher with no help from the PTA. Art to Remember sends a disbursement check to Mountain PTA and is held in the PTA account. Only the art teacher may use these funds. Using the PTA [reimbursement form](#) the art teacher submits receipts to the treasurer for repayment.

Book Fairs & Scholastic Dollars

There are two book fairs per year. Fall Book Fair is run by the librarian, PTA arranges volunteers. At one time, the sales and expenses passed through the PTA and the net proceeds were held in a "Librarian's Fund" of the PTA budget.

The Spring book fair is organized by the PTA Spring Book Fair Chairperson and staffed by PTA volunteers. All income is deposited into the PTA account and a check is issued by the PTA to Scholastic to pay for inventory. PTA Proceeds go into the general fund. Starting spring 2015, the book fair coincided with Family Literacy Night so families could shop in the evening (see Family Literacy Night). The Fall book fair usually remains open during the Halloween Carnival.

- **Scholastic Dollars:** Profit may be taken in "Scholastic Dollars" may be spent only on books and items in the Scholastic Dollars Catalog. Schools are only permitted one Scholastic Book Fair account, Mountain's belongs to the librarian. The librarian shares her login information with the PTA. The PTA works with the librarian to set book fair dates, to keep track of Scholastic Dollars and multi-fair bonuses. A multi-fair bonus is earned for having two books fairs and is split 50-50 by the librarian and PTA. The librarian must not spend PTA scholastic dollars. Scholastic Dollars may be used by the Reading Team to purchase books for Family Literacy Night (see Family Literacy Night).

FUND Run

This annual fundraiser began out of necessity in the Fall of 2009. A dwindling school budget and declining PTA donations required a fundraising rethink. In early 2009, PTA President Robbie Harris asked parents for new ideas to make fundraising more profitable and more fun. Theresa Krepps suggested a FUNd Run, promoting exercise, student and family involvement, and social interaction through letter generation and thank you notes. Here's how -

At the beginning of the school year, students are given letters to send, email or handout to family, friends, neighbors, local businesses, etc. asking for monetary donations to support Mountain School. In October, the students participate in a FUNd Run/Walk at Urban Park. The first 2 years FUNd Run was held at Sullivan Field track. To save money on transportation, FUNd Run was moved to the Mountain neighborhood and eventually to Urban Park.

In 2009, FUNd Run generated over \$28,000, \$13,000 more than all PTA's fundraisers combined for the previous year. Expenses totaled almost \$1,600.

In 2010, \$33,000 was raised. Since 2011, this fundraiser has averaged \$18,000 in net income. An online donation option was added in 2011 (Greater Giving and ejoinme.com).

In 2015, PayPal was introduced for online donations with a donation button added to the PTA website mountainpta.org, hosted by Squarespace.

2016 No theme. Over \$18K raised from Mountain families and community sponsors. Fundraising focus: *Field Trips*.

FUND Run Continued

2017 "Mountain Elementary is Out of this World." Over \$20K raised from Mountain families and community sponsors. Fundraising focus: *new water fountain stations, purchase and installation.*

2018 Superhero theme "Learning is my Superpower." Over \$20K raised from Mountain families and community sponsors. Fundraising focus: *technology upgrades.*
School themes are chosen by the principal and school counselor.

Traditionally Family Breakfast kicks off FUNd Run, approximately 3 weeks prior to the event. Some years the PTA provided giveaways to every student: t-shirts, aluminum water bottles, pedometers and head boppers. In 2015 school-wide incentives were introduced as fundraising milestones were met: popsicles at \$2K, extra recess at a higher goal. The PTA sponsors a school wide movie celebration when our fundraising goal is achieved.

The FUNd Run usually takes place in early to mid-October, an earlier date is preferable due to weather concerns. In 2013, 2014, and 2015, FUNd Run and Halloween Carnival were held on the same day, a Friday in October. Combining events can be stressful for the organizers and volunteers, some staff like it as kids are distracted for only one day.

2016 - 2018 FUNd Run was moved to a Wednesday. Teachers feel FUNd Run is a "lost educational day" so hosting on a Wednesday lessens the burden to catch up on academics. Mr. Hinojosa brings equipment and plays music, adding a fun atmosphere at Urban Park.

Halloween Carnival

A Mountain tradition dating back to the early 1970's that has become a beloved Los Alamos tradition.

Carnival Income: ticket sales, food sales and silent auction.

Carnival Expenses: prize purchase, game refurbishment, food/drinks for resale, printing, advertisement, decorations, etc.

Purchases beyond these general guidelines require PTA board approval. PTA also pays the night custodians for overtime clean up, typically \$200 per custodian.

In recent years, PTA has invited outside food vendors to sell food at the carnival. Vendors pay a percentage of their profits to PTA, typically 10%, agreed in advance.

2016 Dave's Dogs

2017 & 2018 Papa Murphy's Pizza & Grandma's Kettle Corn

There is a large amount of cash associated with ticket sales and silent auction. Great care should be taken to avoid suspicion;

1. Always have two people collecting and counting cash.
2. Cash should be deposited in the secure night deposit box at LANB at the end of the evening.
3. Request LAPD to provide a police escort for the PTA treasurer to the bank.

The carnival should be scheduled with the principal in the spring. Avoid conflicts with "Halloweekend", Pinon Elementary's Pumpkin Patch and/or a home high school football game. Carnival is dependent on a large number of high school volunteers from service organizations like Key Club, ROTC, National Honors Society etc. The football team has also volunteered. Make contact by the end of September.

Halloween Carnival Continued

Historical times & details:

2014 held 4:30 to 7:30 pm on a Friday, selling ticket bundles. 1 ticket/game. 2 tickets for cake walk or haunted house. Prizes handed out at each game.

2015 held 4:30 to 7:30 pm on a Friday. Switched from ticket bundles to a game card system: \$10 Game Card = 15 games, \$5 Punch Card = 5 games. Cake walk and haunted house counted as 2 games/visit.

Prize Store implemented. Game Card stamped as games played, cards redeemed at the Prize Store. The intention was for fewer and better quality prizes.

2016 held 4 to 7 pm. Carnival held on a Saturday to allow for more setup time, especially for the haunted house, and to make it easier for people to volunteer.

2017 held 4 to 7 pm on a Saturday. Game cards were replaced with wristbands, \$5 band for 12 games or \$10 band for unlimited games. All wristbands redeemable at prize barn.

2018 held 4 to 7 pm on Saturday. All wristbands were sold \$10 for unlimited game access and redeemable at the prize barn. A new, upgraded, modernized haunted house was a huge draw and ticket sales were over \$6,000.

School Store & Pop-Up Shop

Since 2010, office staff run the store and keep cash and checks in the locked drawer in the office to be picked up by the treasurer. The school store cabinet should always be locked when unattended, the key is kept in the office. Acceptable expenses include: purchasing new inventory, maintaining cabinet and register in working order, printing associated with school store. Inventory should be no more than can be reasonably expected to be sold in the current school year or the next.

In 2016 school spirit wear was available for purchase online via MyLocker.net. MyLocker.net gives 12% of proceeds from online school store sales to the PTA. Checks are issued on a quarterly basis. By 2017/18 Jostens purchased MyLocker.net. The online store is now available at the following link with all school logos and new special designs. The 12% commission still applies.

<https://schoolstore.jostens.com/school/new-mexico/los-alamos/mountain-elementary-school>

The music teacher has also used the online store to purchase shirts for the school choir & *Strike a Sound* club.

- **Pop-Up Shop:** 2016-18 In the run up to FUNd Run, PTA organized a "pop-up shop" to sell spirit wear/theme wear on Wednesdays at dismissal. PTA had a presence on the lower playground and at the front of school selling from the school store. The treasurer brought seed money for the change. PTA also sold spirit wear during FUNd Run, Carnival, Reading and Math Nights.

Yearbook

In 2016 the PTA took over the yearbook production and sales at the request of the school. The price is voted on by the membership and has been \$20 since 2017.

Since at least 2012 the school has used Memory Book for yearbook production.

Mountain's sales coordinator is Brenda Deuschle: brenda.Deuschle@newellco.com

Yearbook Continued

Yearbook Details:

- **Cover:** The yearbook cover is chosen annually by a contest held in the fall. The cover needs to be submitted to the publisher the first week of December.
- **Portraits:** The photographer hired by the school to take student portraits will mail a CD to the school secretary in late October. This needs to be mailed to Memory Book in November. In February, yearbook volunteers take photos of students and staff who do not have a portrait.
- **Group Photos:** All music programs and clubs needs a group photo taken. 6th grade needs a whole class photo.
- **Do Not Publish:** The office staff must call all parents who said no on the permission to publish form to confirm they do not want their child in the yearbook. Almost always parents are happy for their child to appear in the yearbook. Facebook/social media, the school website are the general concern.
- **Proofs:** Teachers need to proof and initial their class pages to confirm student photos match names and that names are correctly spelled.
- **Deadline:** The final yearbook is submitted to Memory Book the first week of April.
- **Payment:** Online payments can be made through the Memory Book website until a week before the yearbook submission date. Cash or check orders are brought to school by students.
- **Distribution:** Discuss with the principal when yearbooks should be distributed. Print class order list (from treasurer records) and put yearbooks in teacher mailboxes.
- Mountain yearbook email address: mtnlionyb@gmail.com
 - Staff and parents send photos to the yearbook website
- *Treasurer Yearbook Duties*
 1. Generate the list of online orders from Memory Book website.
 2. Collect and list in-school orders. Save the envelopes as documentation of payment.
 3. Make and print class lists for easy distribution. Teachers distribute to their class.

PTA Administrative

Dues Paid to NMPTA

Mountain Elementary PTA membership automatically enrolls members in New Mexico PTA (NMPTA) and National PTA. Membership dues are \$5.50 of which \$3.25 goes to National PTA and \$2.25 to NMPTA.

A check for \$5.50 times the number of new members for the month is sent to NMPTA on a monthly basis and must be signed by both the treasurer and the president. This money is considered "funds held for others" and, for tax purposes, is not considered income for Mountain PTA.

Insurance

Each PTA unit is required to carry Liability Insurance in accordance with the NMPTA bylaws. AIM Insurance provides PTA coverage.

Meeting and Office Supplies

Acceptable expenses are postage, envelopes, office supplies, copy paper and other paper goods needed to execute the business of the PTA. To encourage attendance, babysitters were paid to watch younger children during PTA meetings. Spring 2016, sixth grade students babysat during meetings in the library for free. Babysitting is no longer provided by the PTA during meetings.

Officer's Meetings

Officers meet a week before every general PTA meeting to share information and set the agenda. The president writes an agenda for officer meetings.

PTA Annual Conference

Covers the registration fees and hotel for PTA executive board officers plus the principal to attend the PTA Conference in Albuquerque in the spring. Where feasible, officers are expected to share rooms to lower expense to the PTA. Since 2010, the preferred option has been to attend only the Friday session of the conference for officer training workshops.

PTA Dropbox

Added in 2016. Used by current board members to file PTA documents (current and historical) to pass along knowledge.

<https://www.dropbox.com>

PTA Electronic Communication & Social Media

Officers' Email Account / PTA Website

Officers are encouraged to create a PTA email address, to keep PTA and personal emails separate. In 2015 a PTA Google email account (officers@mountainpta.org) was created through Squarespace. Squarespace also hosts our domain name/website www.mountainpta.org.

Payment renewal is every July/August: domain name (\$20), G Suite email (\$50) and annual subscription (\$96). An officer will have to use their own credit card and be reimbursed by the treasurer.

Facebook

The PTA and the school share a Facebook page with the intention of concentrating traffic and information in one place. The principal posts student photos because they have information regarding permission to publish. Great care should be taken when choosing people who are authorized to post.

Mailchimp

Added in 2015 to manage the PTA mailing list and to send weekly email reminders. Two officers should agree to content and edit the newsletter before sending. Only PTA members are automatically subscribed and incoming kinder parents who sign up for the mailing list at Kindergarten Roundup. To improve communication all teachers were added the MailChimp list in 2018. MailChimp auto-posted the email to the PTA Facebook account. Originally MailChimp auto-posted the email to the PTA Facebook account but currently it isn't being auto-posted.

PayPal Account

2015 a PayPal account was created to streamline fundraising. The treasurer has access to the account. PayPal is also used for school store transactions, Silent Auction payments and yearbook purchases. In 2016 the PTA was given a free card reader by PayPal. In 2018 the PTA purchased a chip reader POS device, both are in the money box kept with the school store. PayPal has made donating more convenient.

Signup Genius

Used for volunteer signups for Halloween Carnival, Fall & Spring Book Fairs, Parent Teacher Lunches and Science Fair Judging.

<http://signupgenius.com>

Summer Spending

A line item was added to the budget in 2019. Summer spending funds will be approved by the membership at the May monthly meeting. These funds will be used by the board to prepare for the new school year and in advance of the first PTA meeting in September. Funds should be used after July 1st and included in the new budget. Summer spending includes, but is not limited to, PTA administrative costs such as printing, purchase of teacher appreciation gift at the start of the school year, school store inventory, Family Breakfast expenses, FUNd Run and Carnival expenses, insurance payment.

In 2018 & 2019 \$5,000 was determined sufficient to cover summer expenses.

Tax Preparation

PTA started using accountant Hartway & Breshears, CPA, LLC for tax preparation instead of a volunteer due to the large number of "Donations" from FUNd Run.

Hartway & Breshears, CPA, LLC (505) 662 3122

Jin Yang: yang@hartwaycpa.com

Programs

Grade Level Special Activities/Projects

In 2018 each grade was given a line item in the budget to encourage teachers to use PTA fundraising dollars towards a special activity. Circa 2015 PTA supported both the 1st Grade Opera program and 2nd Grade wild life projects annually using General Grants funds. Since 6th Grade went to the ropes course, 5th grade to a winter activity, 4th grade swimming, line items were added for 1st Grade Opera program and 2nd Grade Wild Life Study. Kindergarten usually goes to the Children's Museum in Santa Fe, PTA will pay for admission. 3rd Grade has yet to find a special activity but a line item is in the budget as a place hold.

Assemblies

Funds in this line item have been used to bring educational assemblies to Mountain School. Expenses include fees companies charge for school visits. There can be income and expenses from the sale of items such as books associated with an assembly.

Battle of the Books / Cover to Cover

Circa 2010, PTA approved an educational grant for the librarian to purchase books from the Battle of the Books (BOTB) list. BOTB was given its own line item in 2013 to continue this club and competition for students. Renamed Cover to Cover in 2019.

Class List Day/Teacher Meet & Greet

Class lists are usually posted the day before school starts. PTA uses this opportunity to greet families, sell school apparel, and hand out membership flyers. In the past the PTA has set up the Carnival bounce house and handed out popsicles. It is recommended to purchase and freeze 300 popsicles for class list day. Arrange for the school to provide a trash can and use the PTA folding table. August 2018, class list posting time was revised to 2:30 - 3:30 pm allowing students to meet their teachers in the classroom and drop off supplies.

Class List Day/Teacher Meet & Greet Continued

Budget Note: The combined budget for List Day and Family Picnic is \$50, under the line item "Family Picnic/Breakfast/Dinner"

Clubs supported by Mountain PTA

Clubs who receive money from Mountain PTA (e.g. Chess Club, Running Club, Spanish Club, Rubik's Cube Club, and Robotics) are encouraged to host their own fundraisers or collect fees from participants to help pay for the costs of running their group. Monies from their fundraisers may be deposited with Mountain PTA with the understanding that the funds will be spent in accordance with their mission, and with the approval of Mountain PTA. Funds will NOT be carried from year to year and any remaining funds at the end of the school year will be put in the general fund and spent as directed by the PTA membership.

It is recommended that clubs submit a spending plan before the fall budget meeting to ensure that there will be no misunderstandings about acceptable expenditures. The membership may elect to support club activities through Educational Grants.

PTA will encourage clubs to write grants outside of the PTA grant structure for additional needed funds.

Educational Grants

An allocation is made by the PTA each year for educational grants. These grants can be applied for by any Mountain staff member, parent, or student. They are intended to be educational in nature. Historically, preference has been given to grants that benefit the largest number of students for the money. Consumable items with large dollar amounts have not generally been approved.

Preference has been given to items that benefit the whole school and that will be around for many years. Items purchased should remain at Mountain School. Grants are considered and voted on at PTA meetings by all voting members present.

In recent years, educational grants are also considered grants under \$500.

- **Grants Folder:** During a 2017 monthly meeting it was decided a shared google grants folder would be created to give the membership the opportunity to read grant requests in advance of voting. Members felt they were being asked to make snap decisions on PTA spending without time for due diligence. The Principal creates the shared google folder, signs off on grants in advance of adding them to the folder, gives permission to access the folder. Teachers and grant requestors are asked to submit grants well in advance of meetings, especially if they are for larger dollar amounts. Grants will still be considered at monthly meetings even if they are not in the folder. The grant request folder should be linked in PTA newsletters with meeting announcements. The principal should also link the grants folder in her newsletter to parents.

Families in Need (FIN)

This fund pays for items some families struggle to afford. Funded items include school supplies, field trip fees, yearbooks, pictures, school lunch, and shirts from the school store. The school counselor and principal request donations, the PTA does not know the names of FIN. PTA officers may also approach the counselor and principal to remind them that FIN funds are available.

Family Breakfast

In 2015, Family Breakfast was held on a Friday in early September to build community spirit early in the school year. It also acted as the kick-off for FUNd Run/fall fundraising. Family Breakfast was well attended by the whole school community, with Friday a popular day.

Arrange with the school secretary and principal to have the gym doors unlocked early (6:15 am) and for custodians to set up lunch tables for families to eat at and long white tables for serving.

Usually the PTA orders bagel trays and coffee from Ruby K's, supplements with items from Sam's Club, and welcomes families to bring something to share. Note: Pick up bagels the day before. Bring knives and cutting boards to cut bagels into quarters. Bring trays to put bagels, etc. on. 2016 -2018 Bagels were ordered at a discounted rate from Ruby K's and Starbucks donated coffee. Additional items were purchased from Sam's Club and Smith's.

A detailed shopping list has been created and should be closely followed to avoid running out of food. Contact Ruby K's and Starbucks mid August to arrange support. Mrs. Clayton has been a huge help setting up Family Breakfast.

Family Literacy Night

Introduced by the staff in the Spring 2014-2015. PTA paid for some of the books that were given free to students. PTA also provided dinner to encourage attendance.

PTA typically gives a \$1,000 food budget and \$400 materials budget annually.

\$500 cash profit from the spring book fair is converted into \$1,000 Scholastic Dollars and used by the "reading team" to purchase books for Literacy Night. Students and incoming kindergarteners who attend Literacy Night are given a free book. The librarian must not spend these PTA scholastic dollars. PTA shares a scholastic account with the school librarian (see Book Fair/ Scholastic Dollars for more information)

PTA sets up a table and sells t-shirts and yearbooks during Literacy Night.

Family Math Night

Family Math Night was introduced by the staff in the fall of 2013. PTA paid for dinner to encourage attendance.

PTA typically gives a \$1,000 food budget and \$400 materials budget annually.

Spring 2019, Mathamuseum was retained to bring their traveling math museum to Mountain School. Mrs. Unal (GATE) organized Math Night. PTA sells t-shirts and yearbooks during Math Night.

Mathamuseum Contact: Liz Martineau (Mountain GATE teacher) and Gordon McDonough

<https://mathamuseum.wixsite.com/website>

Mathamuseum@gmail.com (505) 670-5069

Family Picnic

The Family Picnic is from 11:00 - 12:00 on a Wednesday in mid to late May. Schedule the date with the principal in April. The PTA hands out OtterPops to students and siblings during Family Picnic. Check with the school nurse to see if any students have food allergies related to Otter Pops. She will contact parents to let them know OtterPops will be served. Also, make sure kids do not take OtterPops on the bus.

Family Picnic Continued

1. Purchase 600 OtterPops and freeze them at home. Plan on more than 2 days to freeze them fully. Take them out of the box to freeze or the OtterPops in the center of the box will not freeze.
2. Bring a cooler or use the PTA water coolers to keep them cold (coolers are stored in the library storage).
3. Set up table at the front of the school (black PTA table is library storage)
4. Bring 4 pairs of scissors, garbage bags, tape to secure bags to table

In 2018 Chartwells served a bbq lunch during the Family Picnic. This was organized by the school, not PTA. Ask principal to check with Chartwells when setting picnic date.

Budget Note: The combined budget for List Day and Family Picnic is \$50, under the line item "Family Picnic/Breakfast/Dinner"

Field Trips

Each grade-level classroom receives an allocation of \$175 to pay for buses, tickets, entrance fees, etc. for field trips. Some classrooms choose to spend more than this amount for more expensive trips or for multiple field trips. Should a class spend over their \$175 allotment, they must raise money to meet the balance. Parents can be asked to pay for field trip fees or the class can run their own fundraiser. With prior PTA board approval these funds can be held in the PTA account with the understanding that money raised can only be used for approved field trip expenses. Any money not used by the end of the school year passes into the PTA general fund. This is an example of "Field Trip Fees Income". Beginning in 2012, it is understood that Mountain School operational budget will cover some field trip expense per classroom and PTA will pay balances (either for larger trips or additional trips) within the guidelines set above.

From 2015-2019 PTA covered all transportation expenses for field trips. District funding only provides \$200/year for the entire school to take field trips.

First Day of School Welcome Packet

The PTA sends home a welcome packet the first week of school. The packet includes a letter to families from the officers, a PTA membership form and a flyer outlining all our PTA supports at Mountain. As the office is very busy at the start of school PTA officers need to copy the packets and put them in teacher boxes.

Budget Note: Printing the welcome packets is a PTA administrative expense.

Gardens and Learning Landscapes

This line item is for soil, compost, tools, plants and other materials necessary to maintain the gardens on campus. The garden boxes and learning landscapes for grades K-3 were constructed with grants from Keep NM Beautiful and Lowe's Education Toolbox.

General Grants

This fund is for large purchases made by the PTA for the school. This should not be confused with the educational grants fund. Care must be taken to ensure PTA money is not spent on items that, in the board's opinion, should be paid for by the district. An effort has been made to purchase items that will provide years of service. Examples included: upper and lower playground picnic tables, the marquee, climbing wall, bookshelves for the new library, the milk cooler and food warmers, a digital camera for yearbook pictures, playground equipment, etc.

General Grants Continued

Generally this fund is made up from excess income raised over the school year to ensure funds raised during one year are spent in that year. This amount is usually determined near the end of the school year. Thanks to successful fundraising, General Grants have been approved during the school year.

In recent years General Grants are considered grants over \$500.

Mad Money

Annually Mountain School teachers receive a stipend to spend on classroom supplies. The original intent was to partially reimburse teachers for items routinely purchased using their own money. Mad Money is gratefully received by teachers, with over 90% taking advantage of this program in recent years.

- **Reimbursement:** Teachers submit the PTA Reimbursement Form and receipts to the treasurer for repayment. Alternatively a request can be made for direct payment by the PTA treasurer to a store using a PTA check. A Mad Money (MM) receipt must **always** be received by the treasurer for accurate bookkeeping and to satisfy the annual audit. **No receipt, no reimbursement.**
- **Mad Money Recipients:** Staff who receive MM include grade level classroom teachers, special education teachers (including GATE), specials teachers, the nurse, reading & speech teachers and office staff. Contract staff (PT, OT, Speech Therapist) are not eligible for Mad Money.
- **Mad Money History:** Due to successful fundraising in 2009 and 2010 Mad Money was increased from \$200 to \$300 per eligible teacher. This later dropped to \$200 in 2015. Budgets in 2016-19 allowed for an increase in the MM allowance to \$250, with 35 recipients.
- **End of Year:** The PTA requests teachers submit receipts by April 30 to allow for timely check reimbursement and cashing. This assists the treasurer in balancing the year end accounts and in the creation of a new budget for the next school year. Mad Money checks can be written after April 30th. If a check is lost and needs to be cancelled and reissued, the bank fees will be subtracted for the reissued check.
- Any change in Mad Money policies should be clearly communicated to staff.

Mad Money from Halloween Carnival

In October 2002 the membership voted: "For the Halloween Carnival, teachers who participate will receive an honorarium in the amount of \$25 per shift to benefit their classroom directly. Other Mountain staff who participate will receive the same amount of \$25 per shift and will specify the classroom, library, computer lab, or other mad money recipient of their choice where their honorarium will go."

Carnival Mad Money shall otherwise work the same way as regular Mad Money. There are usually 2 shifts per carnival so staff can receive up to \$50 in extra Mad Money from the Carnival.

Open House

PTA is invited to speak during the first half hour of Open House while parents are gathered in the gym. This is a good opportunity to inform parents about PTA's role in the Mountain Community, to ask for volunteers and to announce plans for fall fundraising - FUNd Run. The PTA also sets up a table to distribute membership forms and other flyers such as the United Way/LANL giving, Amazon Smile, Box Tops and Smith's Community rewards programs.

PE Programs

In 2012 PE teacher Tony Hinojosa asked the PTA to fund two programs for physical fitness:

1. Swimming program for 4th grade students.
2. Skiing program for 5th grade students.
 - **Swimming:** Originally fully funded and given priority. 4th Graders receive 4 swim lessons from Los Alamos County swim instructors, usually in April and May. Depending on fundraising, parents have been asked to contribute to the cost of the swimming program. PTA covers the cost of transportation under field trips.
 - **Skiing:** Originally the program received 25% funding. From 2012/13 the Skiing program self funded. Parents pay fees, many also make donations for students in need. PTA covers the cost of transportation under field trips.

Future funding will, of course, be dependent on fundraising. PTA will prioritize covering costs for families in need.

Principal Support Fund

In 2016 the Principal Support Fund (PSF) was added as a budget line item. It works just like Mad Money ([use PTA reimbursement form](#)) with a larger amount for the principal to use for the whole school and all staff. \$500 was agreed with Principal Mrs. Guy. The Principal is also eligible for Halloween Carnival Mad Money. Uses have included professional development books, school-wide communication software, solar eclipse sunglasses for all students etc.

Professional Development

This fund has historically provided a maximum allotment per teacher of \$250 to be used to help offset the cost of professional development for classroom teachers. This money may be used for conference registrations, professional course fees, etc. Mountain PTA shall not reimburse hotel, airfare or other travel, meals, etc. In 2015, this item was removed as a budget line item. Professional Development can be supported through Educational Grants.

Scholarships LAHS

Two \$500 college scholarships are awarded to graduating seniors at Los Alamos High School who attended Mountain Elementary. The scholarship committee solicits applications and essays through the LAHS College and Career Counselor and determines recipients. Checks are written directly to the winning students. This program was suspended in school year 2008-2009 due to decreasing revenue and increasing expenses, but was reinstated in 2010 and 2011.

School Counselor Campaigns

In 2016 School Counselor Campaigns was added as a budget line item. Previously the counselor wrote grants to fund school wide initiatives. Again this is similar to Mad Money ([use PTA reimbursement form](#)). \$300 was deemed sufficient by School Counselor, Mrs. Schmierer. Funding has supported anti-bullying campaigns.

School Supply Kits

PTA works with a school supply kit company (currently 1st Day School Supplies) so interested parents can order supplies directly online. This a service to families, not a PTA fundraiser. PTA does not collect money or order forms. Any donations received along with orders should be given to the school counselor for Families in Need.

School Supply Kits Continued

The PTA school supply kit coordinator works with the school secretary in March to gather school supply lists from each class and submits them to the company. Parents purchase kits from the online store until June 30. Supply kits are delivered on pallets the week before school begins. PTA officers sort the kits by class and deliver to classrooms the day before school starts.

Science Fair

This money is intended to promote participation in the Mountain Science Fair. In the past, this has been used for awards, science resource material, advertisement, etc. The LAPS science fair committee solicits donations to be used as awards for the district science fair. Mountain PTA donates \$150 to the district Science Fair.

Senior Appreciation Night

Senior Appreciation Night (SAN) is a county-wide graduation party for LAHS students. SAN is organized by community groups to provide an alcohol free environment on Graduation Night. PTA donates \$100 as it benefits former students, all Los Alamos high schoolers and fosters goodwill in the community.

Sixth Grade Graduation

This is a year end recognition ceremony for sixth graders. Money is spent for small awards, flowers, and food. In 2016, 6th grade parents donated food and decorations. The PTA funds were only used to cover the cost of the DVD given to all 6th grade students. PE teacher Tony Hinojosa created this keepsake and was reimbursed for the DVD purchase.

Sixth Grade Ropes Course

The ropes course program at Santa Fe Community College is a valuable team-building experience and has become a traditional year-end activity for 6th graders. PTA will fund approximately 70% of the costs, with 6th grade team soliciting parent contributions or hosting their own fundraiser for the balance. In the case of a PTA fundraising shortfall, the 6th grade team will decide whether to participate in the program or to have their own fundraiser. PTA will prioritize covering fees for students in need. In some years the PTA has covered 100% of the costs.

In 2015 the 6th grade team decided to add a fall ropes courses trip for team-building. The PTA could only partially fund the fall trip as it occurred prior to fall fundraising. Subsequently PTA earmarked funds for a fall ropes course.

2015-2018, 6th grade applied for a grant and won additional funding from the Juvenile Justice Advisory Board (JJAB) to fund Ropes Course.

2019, 6th Grade attended the Glorieta Activity Camp as Santa Fe CC Ropes Course was unavailable. JJAB discontinued their support.

Teacher & Staff Appreciation

This fund is used to support the teachers and staff at Mountain throughout the school year.

Start of the Year

- Typically PTA starts the new school year with a welcome back gift for the whole staff. The feedback from staff is that they appreciate something to wear. During the summer PTA officers work with the principal to get a list of staff for the coming year and their sizes for ordering. Order a few extra since all staff positions won't be filled yet and to allow for new hires during the school year.
- The PTA gifts are usually given out at a staff meeting before the first day. PTA officers need to fold and sort shirts by size. Included a little note on each shirt with a nice message and the Mountain PTA logo. Deliver to the principal before school starts.
- Prior PTA purchases: shirts for all staff in the spring 2015 (85 shirts) and fall 2016 (75 shirts). Fall 2017: fleece jackets embroidered with the school logo for all staff. Fall 2018: a baseball style 3/4 sleeve t-shirt with the fundraising superhero theme logo for all staff.

Late Fall/Early Winter

- PTA hosts a food event in the teachers lounge. In 2016 & 2017 "We are thankful for our teachers" desserts and coffee before Thanksgiving. In 2018 a snack cart with healthy snacks and drinks before winter break.

Teacher Appreciation Week (first full week of May)

PTA works to show the teachers and staff our gratitude for all they do for the Mountain students. Teachers are always so thankful and appreciative of all gifts.

- 2016 due to limited funds PTA handed out expo-markers to all teachers.
- 2017 PTA arranged for Black Mesa Massage to give chair massages to staff members at school and breakfast burritos from Secret City Kitchen.
- 2018 PTA arranged a week of treats for staff including breakfast purchased from Secret City Kitchen, a snack cart, lip balms and expo-markers.
- 2019 PTA arranged a week of treats for staff including breakfast purchased from Secret City Kitchen, a snack cart, lip balms and school supply cart (wheeled to classrooms).

Tutoring (Homework Club)

This is used primarily to pay homework tutors. Traditionally tutors are Mountain staff members. Homework Club is held two days/week, after school from 3:20-4pm. Teachers identify and recommend children to attend Homework Club. Usually these students need extra help with classwork or would benefit from more challenging work. All students are welcome. A small percentage has been spent on light snacks served during homework club time. LAPS pays the staff but bills the PTA for tutoring at the end of each semester.

Meeting Times

Mountain Elementary PTA meetings for the 2018-2019 school year will be held on the first Monday of the month with the exception of September (due to Labor Day) and April (right after spring break) No meeting is held in January due to the late winter break. Meetings will take place in the Mountain School Library at 12:10 pm on the dates listed below.

- Monday, September 10, 2018
- Monday, October 1, 2018
- Monday, November 5, 2018
- Monday, December 3, 2018
- Monday, February 4, 2019
- Monday, March 4, 2019
- Monday April 8, 2019
- Monday, May 6, 2019

HISTORICAL

Directory (historical)

Historically, a student directory was published by PTA. Due to the size, the directory was printed in Santa Fe (a Mountain alum who gave a discount) and distributed to students. Expense was solely the cost of printing. A directory has not been published for several years due to lack of interest and concerns about privacy.

Family Picnic (historical)

Family Picnics can be a general fundraiser. Proceeds go into the PTA general fund. Income can be from food sales, dessert sales or donations. Expenses may be for food purchased or entertainment. Generally this event is seen as a community event, with fundraising downplayed. The goal is parent participation at the schools. In Spring 2012, PTA sponsored one “Family Day” breakfast in May instead of the Spring Fling Picnic.

Hot Lunch Program (historical)

In the past, Mountain PTA offered a hot lunch program and served lunches to students on Tuesdays and Fridays. Beginning in 2011-2012 school year, the hot lunch program was taken over by the school district who hired a contractor to provide hot lunch four days a week at Mountain.

Families in Need (historical)

The school counselor used to manage this fund to buy snacks and lunches for students who forgot. PTA purchased the food and it was kept in the nurses office. Now the school nurse purchases snacks with school funds.

Innisbrook Fundraiser (historical)

FUND Run replaced the traditional Innisbrook fundraiser (which was limited to online sales only in 2010.) For comparison, Innisbrook had a 21% student participation rate, the FUND Run had a 60% student participation rate. Net profit: Innisbrook 53% while FUND Run was 95%.

Los Alamos Coop (historical)

In 2014 Mountain PTA set up an account with the Los Alamos Coop. For every \$10 in gift cards sold through the PTA, the PTA received \$1.

MightyNest (historical, not promoted since 2015-16)

Might Nest donated 15% of purchases to the PTA when you select Mountain Elementary School.

PTA Grade Level Representatives (historical)

In 2010, the PTA officers solicited parents to be grade level representatives so each grade would have a representative at PTA meetings. Grade level representatives served as a contact person and sent emails to parents in the grade with information about PTA meetings and events. Having grade level representatives significantly increased attendance at PTA meetings since 2010. In 2014-15 there were no grade level reps. 2015-16 Grade level representatives were reintroduced but were not well utilized. In 2016-2017 they were not used. If a clear job description was created and explained grade level reps could be very useful.

Printer Ink & Toner (historical)

Should the PTA help pay for printer ink? The question has been raised multiple times since 2011. As ink is a consumable item, the PTA feels this is a responsibility of the district (see General Grants above), however the PTA is aware of an ongoing need at the school. After reviewing the usage and needs of the school, the PTA membership decided it was a worthwhile use of funds. This allocation may be reconsidered as funds allow. In 2015, this item was removed as a budget line item but can be supported through the school office mad money funds.

School Store (historical)

The school store sold spirit items and school supplies on select mornings before school. The PTA purchased a locking cabinet and cash register around 2004. The school store coordinator generally submitted funds to the treasurer with a cash register tape on a monthly basis. Since the store was largely cash based, anyone dealing with funds should protect themselves against suspicion by always entering transactions into the cash register and by having cash counted by another individual in addition to themselves. The PTA still has a cash register in storage and weekly school store hours could be re-established using the procedures outlined above.

The vendor for many years was Santa Fe ScreenPrints.

Smith's Gift Cards (discontinued)

Mountain PTA has an account set up with Smith's to earn 5% of the sales from Smith's gift cards. Parents can buy Smith's Gift cards through the PTA to spend on groceries or give as gifts to friend and family. In 2015 sales were discontinued.

Spelling Bee (historical)

This fund is used to encourage participation in the Mountain Spelling Bee. Funds were used to pay I.A.s, on spelling resources, dictionaries, and awards. In 2015, this item was removed as a budget line item. Spelling Bee can still be supported through Educational Grants.

Student Council (historical)

This fund was used for activities done by the student council for the general student body. In 2015, this item was removed as a budget line item but may be supported through the Educational Grants.

Sunshine Committee (historical)

This committee purchases small gifts (usually \$10 chamber checks) and cards for Mountain staff on their birthdays. The sunshine committee also arranges for lunches for the teachers and staff during conference week. When budget allows, an allocation may be made for Teacher Appreciation gifts. The committee will not continue to give gift cards since this interferes with the nonprofit status. Starting in the Spring 2015, the PTA participated in Staff Appreciation Week by providing a surprise in the lounge each day. A flyer was placed in the staff mailboxes to notify them. In the fall 2015, the PTA gave gift cards to the custodial staff for National Custodial Workers Day, (October 2). To be in compliance with National and State rules the PTA will no longer be giving "cash" in the form of gift cards but will continue to support staff in non-monetary gifts. The Sunshine Committee line item was removed from the budget, instead the PTA gifts staff shirts and treats through the Teacher Appreciation line item.

Tea Collection (historical)

Children's clothing store who gave 15% of online sales by Mountain families to the PTA during their School Days Promotion for one week in Spring 2016.

Video Sales (Historical)

In past years videos and DVDs of Mountain Elementary events were produced by PAC-8 who charged \$20 for a DVD and \$10 for a VHS. They also charged a \$50 filming fee to be present at the event, but supplied the Mountain School library with a copy of the program in both VHS and DVD formats. Mountain PTA "marked up" the price of DVDs and VHSs by \$1.00 to attempt to recoup a portion of the \$50 fee. Only \$20 per DVD, \$10 per VHS, plus the \$50 fee is paid to PAC-8. In the 2010-2011 school year, a Mountain parent took over filming school events and selling DVDs so this service is not offered through PTA anymore.