

Appendix D

Commitment to Excellence Fund Guidelines and Procedures Revised and updated 1/16/2018

Purpose: To solicit, review and recommend requests for spending income in excess of the PTA operating budget. School staff, administration and PTA members may submit suggestions. Anyone submitting a request must be a PTA member.

The Commitment to Excellence Fund Committee will consist of Seven Members: The PTA CTEF Chair, two faculty members, one SFMS Campus Instructional Specialist (CIS) and three parent members. (The faculty and parent members will be chosen by lottery process coordinated by the Chair and the Principal.) *In the event that all Commitment to Excellence funds are not approved for disbursement by the spring of the current year, the committee will remain intact to disburse the remaining funds in early fall of the following year. Any proposed disbursements should be approved at the 1st general PTA meeting. If any member is unable to serve in the fall following his/her year of service, that member may be replaced by appointment by the chairman. In the event of a fall disbursement (after the 1st general PTA meeting), the new Commitment to Excellence Committee will begin their service.*

Promotion of the Commitment to Excellence Fund program may include but not be limited to: E-blast through SFMS PTA distribution list, letter via principal to all faculty through email and/or faculty mailbox distribution, marquee, announcements at PTA board and general meetings. These communications would include the purpose of the committee, request instructions, forms, deadlines, and chairman contact information.

Meetings: There will be a minimum of one Commitment to Excellence Fund (CTEF) meeting in one school fiscal year with additional meetings being called by the chairperson as needed.

Guidelines for Requests: The suggested items should be appropriate for PTA purchase (i.e., any item that would normally be included in the PTA's annual budget). These items include but are not limited to teacher and instructional materials, PTA-sponsored programs, technology, campus beautification, and donations to appropriate organizations.

Please note: The PTA will only consider additional funding outside available SBISD funds.

In order for these requests to be considered, the following three criteria must be met for faculty and staff requests:

1. There are no other sources of funds (i.e. district, grants, etc.) for this item. This is the funding of "last resort".
2. This request is approved for your subject curriculum by the department head.
3. This request is considered a campus priority and approved by the principal.

Procedures for Submitting Requests: Forms for application are located in a box in the teacher workroom and on the SFMS website. Any pertinent information (catalogs, copies of bids, etc) may be attached to the form. Competitive bids and comparative pricing should be obtained when appropriate. If sole source, please include an explanation. Be sure to include shipping costs where applicable. No sales tax may be included for funding. Completed forms approved by your department team leader should be given to the principal. The Principal should approve all forms before submissions.

The committee may request additional information from the person submitting the application if needed.

Committee Recommendations: At the conclusion of the meeting(s), the Commitment for Excellence Fund Committee should present more than one option to the PTA Executive Board. The 1st option should be the committee's recommendation; the 2nd option would be a variation of it. Every effort should be made to disperse funds expediently; however, if a large purchase is anticipated in the coming year, funds may be held in appropriate line item in the coming year's budget with specific guidelines in place.

Once the PTA Executive Board has chosen an option, the General PTA Board will vote. Signatures and dates of approval will be added to the application form.

Ordering Approved Items: After the items have been approved as noted, the individual who submitted the Commitment to Excellence Fund form will be notified of approval and should finalize orders with approved vendors only. Faculty and staff must place orders through the Librarian (books) or the Principal's Administrative Assistant (technology). Parents placing orders through the school district should also place them with the Principal's Administrative Assistant.

If an applicant was not approved, an immediate reply should be given to them. It should state why the request was denied (not enough funds available, district has funds to cover program, did not meet guidelines, etc.)

Placing Items into Service: The items or materials purchased will be donated or loaned to SFMS for the exclusive use of SFMS students, faculty, or PTA members. Items will be marked as such and appropriate inventory maintained along where/how the property would be stored. The appropriate form will be completed and signed by the representative of the PTA and the campus. (Refer to pages 42 & 43 of the Texas PTA treasurer's guidelines for the forms.)