

Wedgwood PTA

2023-2024 Budget Development Narrative 4.12.2023

Overview

For the 2023 - 2024 school year, the budget committee decided to leave the Mission and Vision statements unchanged from previous years, and continue to implement a budget that was consistent with those statements, while also putting forward a balanced budget. The committee reviewed and discussed results of the family survey as another input. Following the budget rebuilding that occurred for the 2022 - 2023 school year, the committee proposes adding new community engagement events:

- Kindergarten social (\$500)
- bike to school day (\$500)
- a volunteer appreciation tea (\$250)
- one-off parent socials for individual grade levels (\$1200)

Additional support to the school was provided in the new budget by

- increasing the classroom supply for all teachers to \$500 (music, resource room, interventionists)
- increasing staff grants from \$2500 to \$5000
- supporting playground equipment (\$1000) and Mighty Movers (\$500)

Given the success and organizational challenges of the library fundraiser in 2022, the PTA will take the organization of that fundraiser over in the 2023-2024 school year. This will allow the PTA to both increase the amount of library funding (\$10000 from \$2500) and eliminate the car wash as a fundraiser. Half the funds from the 2022 Read a Thon will also be earmarked by the PTA for field trips.

Staff support

Historically, the largest line item of the Wedgwood PTA has been for supporting staff positions. While the range of support has generally been in the \$100K - \$120K range, the 2022-2023 budget reduced this support to \$70K (\$190 / student) plus \$6K under "School Operations". This reduction was necessitated by reduced funding during the pandemic, and uncertainty about future fundraising capabilities. Overall reductions in fundraising affect the ability to support staffing because the Wedgwood PTA standing rules stipulate that the PTA liabilities to the school for a year (staffing, classroom support, etc) must be less than the amount in our reserves (savings account). In developing the 2023-2024 budget, the committee wanted to acknowledge that (1) our reserves are strong (\$150K in savings, untouched during the pandemic), and (2) as an organization, the WW PTA has had proven success at running large scale fundraising campaigns (e.g. auctions). With no additional fundraisers or changes to the standing rules, the budget committee considered scenarios that would increase staff support by 25-40K.

The budget committee discussed not increasing staff support due to ongoing discussions about the role of PTAs and fundraising ([#TakeBackPTA Resolution from Seattle Council PTA](#)). The WW PTA has not yet taken a clear stance on this resolution. A secondary reason for keeping staff funding constant is that this allows for a balanced budget with no major adjustments to fundraising.

Given increased fundraising income generated by the Read-a-thon this year, the budget committee did project a small surplus for the coming year. Additionally, the committee learned that there would be a significant loss of hourly employee hours due to depletion of school

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sources and an ASB fund comprised of money previously given by the PTA. With consideration of these factors, the budget committee developed 3 staff funding scenarios to consider:

1. 76K (keep funding constant from 2022-2023 levels, assume all fundraisers will be reduced by 14%, surplus of 5K)
2. 81K (same as # 1, use 5K surplus for staffing)
3. 86K (assume Big Give reduced by 14% and MAT reduced by \$5K, 10K surplus for staffing)

The committee also moved a \$6K line item of tutor funds from school operations to school staffing. The result would be a total staffing support amount of up to \$86K (\$270/student based on projected enrollment of 319). The committee acknowledges this may not be sustainable in future years and that with further discussion regarding the Take Back PTA Resolution & equitable fundraising, the WW PTA may decide to scale back both fundraising and staffing support.

Fundraising

The majority of respondents in the PTA survey supports bringing back an auction, and participating in a joint North Seattle fundraiser. The PTA board also acknowledges concerns regarding equity and inclusivity with auctions. To meet the desire for a parent event, the PTA Executive Board voted to hold a budget neutral parent event next year in lieu of a fundraising auction. The budget committee supported this idea. The committee discussed options for a meaningful commitment of resources should the PTA board vote to join the North End Seattle Schools PTA Alliance (NESSPA). Various scenarios were considered and ultimately decided to include a line item of \$1000 to support NESSPA events next year. Additionally, Wedgwood parents will be given the opportunity to give separately to a fund that will then be granted to NESSPA. Both of these options are pending a PTA board vote.

Recommendations for future years

Finally, members of the budget committee felt that the compressed timeline and current budget planning process with the school could be more collaborative and iterative. The committee recognizes a few areas where the budget planning process could be improved in future years.

First, the BLT expressed uncertainty in fall 2022 about whether PTA funds for school staffing would be accepted. Decisions were not finalized until mid-February 2023, leaving the budget committee 10 days to finalize support for school staffing. In future years, the PTA should request any major changes to the funding process to be made before SPS winter break.

Second, there is a lack of clarity from SPS and the school about timelines for the PTA budget to be finalized. In future years, we recommend the PTA attempt to finalize the entire budget (and at a minimum support for school staffing) before mid-winter break.

Third, outside of staff funding paid through the district, there is little visibility into how PTA funds are actually spent and how much remains. For the 2022-2023 school year, residual PTA funds (previously earmarked for "Playground" and then "Field Trips" by the PTA) were used to increase support for tutors. The PTA should request a quarterly PTA fund allocation analysis that details where PTA funds have been spent and how much remains.

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Proposed timeline:

- November: PTA expense treasurer recruits volunteers for budget committee. Exec committee designs survey for parents (and potentially staff)
- early December: surveys are sent to parents
- mid December: Budget committee roster is presented to the PTA Board at the Board meeting.
- Early January-
 - school staff provide input on a prioritized list of needs with estimated amounts; this could be presented as scenarios of 3 levels of potential funding (status quo, and 2 alternatives)
 - obtain parent community input via PTA survey, targeting a high community response rate to help further guide decisions.
 - consider obtaining student input via the student council or discussions in the older grade classrooms as well.
- January-
 - PTA budget committee convenes to develop proposal for school staffing and school support utilizing staff, parent & student data
 - given school needs, budget committee responds with a proposed budget to school
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- Early-mid February:
 - School Staffing budget presented to parents at the February Board meeting, and finalized before mid-winter break
- March
 - PTA budget committee finalizes remaining parts of the budget (e.g. fundraising, additional expenses) and presents to PTA Board at March meeting. Budget voted on at spring General Meeting

Summary of recommendations:

1. The PTA should request any major changes to the funding process to be made before SPS winter break (SPS budget cycle [here](#) and [here](#)).
2. We recommend the PTA attempt to finalize the entire budget (and at a minimum support for school staffing) before mid-winter break
3. The PTA should develop, communicate and enact a more collaborative budget planning process early in the year.
4. The PTA should request a fund allocation analysis at least quarterly, that details where funds have spent and how much remains.
5. PTA-supported staff funding should be allocated through the district via a grant.
6. Non-staff funding (i.e. stipends, grants, etc) for the school shall require a receipt or invoice to justify payment.