

**Academie Lafayette  
Parent Teacher Student  
Organization  
3<sup>rd</sup> Quarter Meeting**

Cherry Street Campus Auditorium

February 23, 2015

# Agenda

- I. Opening Remarks – Jeff Johnson PTSO President
- II. AL Board Update – Marvin Lyman, Parent Elect Board Member
- III. A message from the Administration – Heather Royce
- IV. Annual Fund Message – Sarah Guthrie
- V. IB/MYP – Jessica McDowell
- VI. Fundraising discussion – Becky Smith
- VII. Future of PTSO – Jeff Johnson
- VIII. Preview of 4<sup>th</sup> quarter meeting
- IX. Drawing

**Fundraising**  
Framing Potential Changes  
2015-2016

# Background

- A public/charter school with the mission such as ours requires funding that reaches beyond the operation expenses of the school
- We recognize there is a fatigue factor that sets in when families and businesses are asked to participate in too many fundraising efforts or donate too often
- Fundraising is a necessity, this is a framework to establish a methodology to fundraising that promotes our school, brand and school organizations – to simplify and amplify the efforts

# Current Situation

- There are currently many fundraising activities that are tapping our community and resources too frequently. Creating donor & participation fatigue (especially for 'selling stuff')
  - Diminishing our brand
  - Some producing minimal success
  - Competing priorities/efforts that while may support same overall goal they are structured as silos
  - Start over each year vs. establish continuity
- The following is a proposal to evolve the current fundraising framework with structure & guidelines

# Operating Principles for this Work

- Not all events are fundraisers (Boo Bayou, year-end picnic)
- Fewer bigger and better scheduling
- Inclusiveness is key. Include low cost participation opportunities (dances)
- Build on the passions & talents of the community
- Build continuity of successful events while being open to new ideas and experimentation

# Glimpse Into Current Efforts

Operating Fund	6th Grade Trip	8th Grade Trip	5th Grade Trip	Student Council
Family pledges & gifts	1/3rd casuals days	1/3rd casuals days	PTSO allocation (\$3K)	1/3rd casuals days
Raffle ticket sales (\$45K)	Discount Cards	Spirit Wear		
PTSO allocation (\$20K)	Trash Bags	Babysitting		
	Spirit Wear/ Gym Clothes	Pickle Sales		
	School Kidz Orders	PTSO allocation (\$1K)		
	Restaurant Fundraisers			
	Dances			
	PTSO allocation (\$15K)			

# PTSO Budgeting

**PTSO budget comes almost exclusively from Evening in Paris**

## **2014-2015 budget expenditures**

- 22% operating fund (includes 13 for field trips)
- 20% EIP expenses
- 15% fund a need (from EIP 2014)
- 13% Trips (5th, 6th and 8th)
- 9% Budget allocations & requests (apple cart, emergency assistance cards, host family gift card, etc.)
- 7% cherry kitchen
- 7% social events (boo bayou, year end picnic, etc.)
- 7% capital campaign (completed)
- 2% admin (bank fees, babysitting, pizza)



# Annual Operating Fund

- **The fund targets the gap between the operating costs and public funding**
- **Goal is \$240/student (\$5/week) Transportation (daily door-to-door busses, including field trips)**
  - Technology (robotics, computers, STEM initiatives)
  - Art & Music (art and music program, including supplies)
  - Sports (staff and equipment expenses for soccer, basketball, track)
  - Library (book & periodical purchase, software, public library affiliation)
  - Health & Wellness (social workers, nurses & supplies)
  - Faculty & Interns (visas & intern program)
- **2014 Raffle sales \$45,000**
- **2014 PTSO gift \$20,000**

# New Framework

## Current fundraising buckets

1. Annual Operating Fund
2. 6th Grade Trip
3. 8th Grade Trip
4. 5th Grade Trip
5. PTSO Operating Budget
6. Student Council
7. Library
8. Ad Hoc (Playground, STEM, Robotics)

## Proposed fundraising buckets

1. Annual Operating Fund  
Transportation
  - Technology
  - Art & Music
  - Sports
  - Library
  - Health & Wellness
  - Faculty & Interns
2. PTSO Operating Budget
3. Travel Fund
4. Facility needs  
(building/grounds needs not met by school budget)

# New Framework

## From :

- Ad hoc requests made to Sarah Guthrie – or efforts initiated without school approval
- Ad hoc fundraising efforts are plentiful and competing with each other
- Silo fundraising – “each class for its own” mentality

## To :

- Advance approval to efforts to ensure clear calendar. PTSO assists in building calendar
- PTSO provides guidelines to ensure requests fit within mission/charter of school and to minimize one-off, non-profitable efforts
- Champion Musketeer “All for One” motto; shared mission to forge partnership

# Running List of Ideas

## **Amplify what we do:**

- Add/move a bigger but low-cost participation 'event' to fall (e.g. Adult prom, Trivia Night)
- Beer garden at Boo Bayou and Year End Picnic
- Consolidated Spirit Shop (apparel, drinkware, etc.)

## **New ideas:**

- Chili/Soup or BBQ throwdown
- Movie Night (screen on playground, more about community)

# What Do We Need From You

- Your constructive feedback
- Participation in developing new guidelines
- Run for 2015-2016 PTSO board including fundraising chairperson
- Follow guidelines once in place

# Future of the PISO

Where do we go from here?

# A Little History

- From inception through 2012 PTSO operated as an independent organization
- Never formally organized a separate entity or applied for tax exempt status
- Structure was somewhere between independent organization and school committee
- In 2012 it was determined the group needed to formalize its structure
- Goal was to create independent entity separate from the school
- PTSO would have its own bylaws, board and bank accounts

# A Little History Continued...

- In 2012 the *Academie Lafayette Charter School Parent Association* was formed as a MO not-for-profit corp
- The plan was to seek 501c3 status
- Bylaws were adopted at September 2013 PTSO meeting that reflected this structure
- Issues arose within group about the complexity of operating such an entity
- Annual fillings, audit requirements, tax consequence and ongoing costs were the main issues
- Ultimately the plan was abandoned



# Current Status

- *Academie Lafayette Charter School Parent Association* became inactive in 2014 because required annual disclosure was not filled
- The application for 501c3 status was never pursued
- All PTSO money was moved to account controlled by administration
- The PTSO is currently operating as volunteer coordinator and budget advisory board
- Current bylaws do not reflect current structure

# Where Do We Go From Here?

- Continue with the status quo?
- Finish the task of creating an independent entity?

# Where Do We Go From Here?

- If we choose the status quo
  - Rewrite the by-laws to reflect our status as advisory committee
  - Little to no cost
- Elect independence
  - Hire professional help
  - Start cost of several thousand dollars
  - Annual auditing and accounting cost of several hundred dollars

# Where Do We Go From Here?

## **Pros:**

- Autonomy from the school administration
- Greater control over the funds raised by PTSO
- Ability to raise funds through avenues that are not allowed or endorsed by the school (alcohol sales, sponsorships and grants available only to not for profits)
- Takes burden of PTSO accounting from school staff
- Expands participation from parents that have resisted due to mistrust of or marginalization by the administration
- Liability protection for volunteer board members

# Where Do We Go From Here?

## **Cons:**

- Time and effort required to administer the independent entity
- Cost of auditing and accounting services
- Administration gaps created by annual volunteer turnover
- Possibility of prior year tax liabilities
- Are we fixing a problem that does not exist?

# Where Do We Go From Here?

- No vote will be taken tonight
- Looking for feedback
- Final decision will be made at 4<sup>th</sup> Quarter PTSO meeting in May

# Preview of 4<sup>th</sup> Quarter Meeting

- 2015 – 2016 PTSO Budget Approval
- Election of 2015 – 2016 PTSO Board Officers
- Determination of future PTSO Structure
- Mad Science Demonstration for the Kids
- Pizza and More Fun Door Prizes

# Drawing

- **Drawing #1**
  - \$200 Gift Card to Newport Grille
- **Drawing #2**
  - \$200 Gift Card to Café Trio



Closing

***THANKS FOR YOUR TIME AND  
PARTICIPATION***