



## GUIDELINES FOR SPENDING PTA ALLOCATIONS

Allocation guidelines are appropriate for an organization that is held accountable to the parents and school community for the responsible expenditure of their money. The PTA board budgets a certain amount of money for the elementary principals to spend during the school year. The principals are required to make a formal written request to the PTA board before he/she has access to these allocated funds. The formal request should include how the money will be used and how it will benefit the students. Funds are then allocated through mutual discussion, with the final decision in the hands of the PTA.

What are appropriate uses of PTA funds?

1. Funds should benefit a majority of the children of the school and have a general benefit to all children.
2. Funds should be used to promote student-oriented programs and further education that benefits the health, safety, education and welfare of children.
3. Approved uses of funds should follow the mission and purposes of the PTA.
4. When purchasing items for the school, the funds must be spent according to an approved budget, and the school must provide a purchase order, invoice or receipt.
5. It is the fiscal responsibility of the school system or district to provide for the curriculum and infrastructure needs of the students. PTA funds should never be used to provide curriculum materials, only support or enrichment items.

PTA's vision is making every child's potential a reality. PTA's mission is to be:

- A powerful voice for all children,
- A relevant resource for families and communities, and
- A strong advocate for the education and well-being of every child.

PTA's purposes, or historical goals are as follows:

- To promote the welfare of the children and youth in home, school, community and place of worship
- To raise the standards of home life
- To secure adequate laws for the care and protection of children and youth
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

*from National PTA, pta.org*



SCHOOL ALLOCATION REQUEST FORM

FUERSTENAU

SCHAVEY

SCOTT

HERBISON

Please provide specific details to assist the PTA Board in considering this request. The request should include how the monies will be used and how it will benefit all students in regards to curriculum enhancements as well as school and district goals for student achievement, safety, and well-being.

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Submitted by: \_\_\_\_\_ Date of Request: \_\_\_\_\_

**Requested Amount: \$** \_\_\_\_\_  
(please attach purchase order, invoice or receipt)

**Your request will be considered and voted on at the next scheduled PTA Board meeting.**

\_\_\_\_\_ Request approved      \_\_\_\_\_ Pending, add'l info. required      \_\_\_\_\_ Denied

PTA Executive Board Member  
Signature & Date: \_\_\_\_\_