

**Oak Knoll PTO**  
**Minutes of the PTO General Board**  
**June 8, 2018**  
**8:15 – 9:30 AM**  
**Oak Knoll Library**

<b>2017-2018 Executive Board Officers:</b>	
Christa West, President	Katie Gardner, Communications Chair
Jenny Buddin, Vice President	Kristen Gracia, Oak Knoll Principal
Janelle McCombs, Parliamentarian	Leah Kessler, Oak Knoll Assistant Principal
Katherine Robinson, Secretary	Trish Stella, Teacher Representative
Renee Gorzynski Bache, Treasurer	Rebecca Emery, MPAEF Representative (Envoy)
Julie McEvilly Roman, Financial Secretary	Karen Dobbyn, Auditor

**Quorum present:** Yes - 22 attendees - see attached sign in sheets.

<b>I.</b>	<b>Call To Order</b>	<b>Christa West</b>
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The General Board meeting was called to order at 8:25 AM by President Christa West.

<b>II.</b>	<b>Discussion and vote on 2018-19 PTO Executive Board Slate</b>	<b>Christa West</b>
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- Unanimous vote to approve the slate:
  - President: Jenny Buddin
  - VP: Sarah Sobel
  - Parliamentarian: Christa West
  - Treasurer: Renee Bache
  - Financial Secretary: Camille Kennedy
  - Auditor: Vickie Mrva
  - Secretary: Katherine Robinson
  - Communications: Katie Gardner

Please note that the “auto filled” roles were elected to serve on the board previously and are finishing out the terms of their positions. Vice President rolls to President and then rolls to Parliamentarian over a 3 year term.

<b>III.</b>	<b>Discussion and vote on 2018-19 PTO Proposed Budget</b>	<b>Christa West</b>
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- Budget is dependent on what the PTO raises in the fall.

<b>III.</b>	<b>New Initiative - Community Campaign</b>	<b>Erik Burmeister, Superintendent</b>
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- Student Principals for the Day (Teddy & Zander) introduced Erik.
- Erik presented an overview of the Community Campaign (see attached presentation).

<b>XIII.</b>	<b>Adjournment</b>	<b>Christa West</b>
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President Christa West adjourned the meeting at 9:30 AM.

Respectfully submitted,  
 Katherine Robinson, PTO Secretary  
 Date approved: July 13, 2018 via email

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# Community Campaign

— Madness or Genius? *We'll see.* —

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# Historical Prospective

Before MPAEF began, PTOs were the only game in town, raising money for their schools at a time when MPCSD lagged our neighboring districts in pretty much every indicator that mattered. Through a concerted effort by Board members, parent leaders, and staff, MPCSD engaged a new plan and vision for what the district could be. This growth included the creation of MPAEF.

Before Joint Campaign, PTOs and the 'relatively new' MPAEF raised monies separately and for different, yet sometimes confused purposes. There was an unstated, yet palpable sense of confusion and competition among and between the organizations and the donors to whom they were messaging.

# Historical Prospective

Also prior to the Joint Campaign, many parents shared that MPAEF felt exclusive, for "big" donors only (modest donations and those making them weren't valued), and conversely the PTOs were for "everyone." Beginning about 10 years ago there was a concerted effort by MPAEF to be more inclusive - small donations were sought and participation was valued over dollar amount; that effort was successful and participation rates rose.

# Enter the JOINT CAMPAIGN (*phew!*)

## The Joint Campaign provided...

- Greater collaboration and sense of common purpose.
- Inclusivity for MPAEF
- Increased clarity around what each organization was funding.
- Agreements around who was fundraising when and how.
- Less duplication of effort; more focus for volunteers.

## Yet a few challenges exist today...

- Confusion among even involved parents around the two organizations/asks.
- Donating is still not “easy.”
- Our community has changed dramatically in the last 10 years; donating habits have also changed.
- Volunteers are fewer and those available are spread thin and less able to take on a “full time job that doesn’t pay.”
- Overwhelm by the number of competing “asks” of our parents and donors.

## **Some parents and donors have been asking...**

As the needs and demographics of our community change and the benefits of the Joint Campaign have become commonly accepted, is it the right time to consider a Version 3.0 regarding community fundraising?

***What's our answer?***

# The Community Campaign

# The Community Campaign is...

- A “pilot” of a fundraising prototype that was collaboratively designed by PTO & MPAEF volunteers, MPAEF staff, and District leadership.
- An effort to make district messaging more clear, fundraising easier, and volunteering more enjoyable and manageable.
- Isolated to the fall fundraising season for both PTOs and MPAEF.
- Ensuring that each PTO has the money it needs for the work it does.
- Raising the same amount or more, from the same people, for the same benefit--OUR KIDS--just raising slightly differently.



# The Community Campaign is not..

- An effort to merge the two organizations.
- A desire to change or control anything about PTO or MPAEF organization/leadership/mission/projects other than how money is received during the fall campaign.
- A judgement on any past fundraising activities.
- A new idea. These changes have long been sought by leadership in both organizations.
- The district's directive. Staff is here to support/facilitate the CC to help it run smoothly for all involved.
- Permanent...unless the organizations want it to be.

# Initial Intentions & Agreements: *Structure*

- Name: Community Campaign (CC)
- Tagline: One Community. One Cause.
- Community Campaign chairs will be selected as have Joint Campaign chairs and will serve on the District Council.
- Relationship between the PTOs and the MPAEF will be defined by MOU signed by all five organizations (annually, should CC continue).
- PTO will continue to elect “membership” or “fundraising” chairs; those volunteers will work closely with the CC to manage their school’s data.
- PTOs and MPAEF will retain their separate 501c3 statuses and fundraising ability.

# Initial Intentions & Agreements: *Donations*

- Parent donors will give ONE donation (write one check) to the payee, "MPAEF--PTO Community Campaign."
- First \$250 of each donation for each child will go to the child's school's PTO. Remainder will be retained by the MPAEF. (See 'Donation Summary')
- PTOs will receive two check disbursements from the MPAEF: the first reflecting the initial donation, the second reflecting "donor matching" dollars.
- Donors will receive one thank you letter and receipt from Community Campaign on behalf of MPAEF & PTO and the MPAEF's tax ID #.
- PTOs may, if desired, send a separate TY letter, but no receipt.

# Initial Intentions & Agreements: *Data Privacy*

- Data will be shared by joint team of PTO/MPAEF membership committee, just like past membership teams.
- Each school team will see its own data by family. Will see aggregate data for other school sites.
- Families will be coded. Only a school site membership team will see individual family name data.
- Overall number of individuals with access to family giving data will not change significantly.
- PTO/MPAEF will collaborate and coordinate regarding families with students at multiple schools to ensure that donations are disbursed accurately to the associated PTOs.

# Initial Intentions & Agreements: *Budgets*

- PTOs will still own their own budgeting and priorities in partnership with their site's principal.
- PTOs will still be able to follow their general budgeting process & timeline with General Membership meetings in October approving annual budget.
- PTOs will still raise their funds at the start of the year and spend those funds IN the same year.
- MPAEF will still raise their funds for a grant to be used the following year.
- The District will assume ownership over the non-overnight field trip budgets (all expenses and transportation) for elementary sites and some staffing for Hillview to ensure enough funds for the remaining site priorities.

# Initial Intentions & Agreements: *CC Start-up Costs*

- Projected cost for marketing, collateral, supplies for CC start up costs = \$24,000
- Each PTO and MPAEF is asked to contribute \$4,000 towards this effort. Money from current budget.
- District will also contribute.
- One time, start-up cost. Year after year costs will be much lower.

# Initial Intentions & Agreements: *Calendar*

- Campaign 2018 dates are August 1 through October 5. 2019 will be similar.
- In coordination with the Community Campaign, District staff will create a “fundraising calendar” to help decrease the number of competing “asks” throughout the year.
- First check will be cut to PTOs on October 15 reflecting all donations prior to Oct 5 fundraising window deadline.
- Second check will be cut to PTOs on March 31 reflecting “donor matches” collected prior to March 1. All donor matches received after March 1, will be retained by MPAEF.

# Initial Intentions & Agreements: *Data Calendar*

Data pulls from district				
May 15	August 15	September 15	October 31	January 31
Data fields to be included				
Child F Name	Parent 1	Parent 2	Parent 3	Parent 4
Child L Name	F Name	F Name	F Name	F Name
school	L Name	L Name	L Name	L Name
grade	email	email	email	email
	phys address	phys address	phys address	phys address

No need for classroom assignment. Data may be managed/shared in Google doc for tracking.



# Initial Intentions & Agreements: *Fundraising*

Sample Fundraising Season Calendar

Aug 23- Oct 5	Oct 6-12	Nov 1- Dec 15	Jan-Feb	Mar	Apr-Jun
Community Campaign Season	Internal CC wrap-up	Caring & Sharing and Food Drive	Site-based fundraisers as desired	Auction ramp-up and event	Site-based fundraisers as desired

\*\*Book Fairs can run during Back to School Night or Open House or another time as determined by school.

# Donation Summary

Family 1	Family 2	Family 3	Family 4	Family 5
1 child @ LR	1 child @ OK 1 child @ HV	2 children @ EN	1 child @ LR 1 child @ HV	1 child @ HV
Total Donation: \$2000	Total Donation: \$1500	Total Donation: \$800	Total Donation: \$30	Total Donation: \$5000
LR PTO = \$250 MPAEF = \$1750	OK PTO = \$250 HV PTO = \$250 MPAEF = \$1000	EN PTO = \$500 MPAEF = \$300	LR PTO = \$15 HV PTO = \$15 MPAEF = \$0	HV PTO = \$250 MPAEF = \$4750
<i>Corporate Match</i> LR PTO = \$250 MPAEF = \$1750	<i>Corporate Match</i> OK PTO = \$250 HV PTO = \$250 MPAEF = \$1000	<i>Corporate Match</i> EN PTO = \$500 MPAEF = \$300	<i>Corporate Match</i> LR PTO = \$15 HV PTO = \$15 MPAEF = \$0	<i>Corporate Match</i> HV PTO = \$250 MPAEF = \$4750

*Note: Corporate Matches, which will apply only to donors whose companies offer the benefit, will reflect the same donation amount as is dispersed during the Community Campaign for those matches that occur before March 1.*

# Benefits of Community Campaign

## Immediate Benefits

- Shorter campaign season (by one month)
- One check or online payment/one gift
- Clear and concise messaging
- Fewer emails in your inbox
- School newsletters with fewer “asks”
- Ease and enjoyment of volunteering

## Potential Benefits

- More clarity and ease = more \$\$\$
- Not having to budget for field trips and their transportation; greater focus on site priorities.
- Possible future opportunity to wrap ‘everything’ in.







