

WASHINGTON IRVING PTO OF OAK PARK

NEW FUNDING REQUEST

The purpose of this form is to request approval for a new expense not currently in the PTO budget, or an expense that is in the PTO budget, but exceeds the existing budgeted amount.
*To request a check from the PTO to pay an approved, but unpaid expense, please complete the Check Request form
 To request reimbursement for an approved expense you already paid, please complete the Reimbursement Request form.*

FUNDING GUIDELINES

The PTO Constitution and Bylaws outline the requirements for reviewing and authorizing all funding requests. The following is an overview to help facilitate a transparent and inclusive means of accessing PTO funds for the benefit of the Washington Irving School community. New Funding Requests can be submitted by parents, teachers, administrators or committee chairs.

Requests are authorized in one of two ways:

1. **Annual budget process** - this begins in July, and the final budget is approved at the first meeting of the school year, in September. The final budget, which details all approved line items, is then posted on the PTO website.
2. **Approval by the PTO during the school year** – for new requests outside of approved budget line items. The amount requested determines the review and approval process, as follows:
 - a. Requests **up to \$1,000** - require PTO Executive Board review and approval. *These expenses will then be reported to the general PTO membership during a scheduled PTO meeting.*
 - b. Requests **over \$1,000** - require PTO general membership approval, with the approval and recommendation of the PTO Executive Board. *For emergent issues that cannot wait until the next PTO meeting for approval, the PTO Executive Board has the authority to provide expedited approval.*

INSTRUCTIONS

- 1) Complete this request and attach any relevant documentation supporting your request (vendor/item cost estimates, etc.).
- 2) Email completed New Funding Request & supporting documentation to the PTO Treasurers at Treasurer@IrvingPTO.com or place paperwork in the PTO Mailbox in the Irving School office. [Email is preferred to process request faster.]

REQUEST DETAILS

Date of Request:		Requested By (Name):	
Purpose of Request <i>Specify the event, project, or activity proposed, and, if applicable, the committee(s) requesting funds</i>			
Benefit to School Community:			
Date [or Proposed Date] of Event/Activity:			
Amount of Funds Requested:			
Date Funds Needed:			

Signature of Requestor (Required)			
Principal Signature/Approval (If teacher request)			
FOR TREASURER'S USE:			
PTO Meeting Date or Approval Date:		Notes:	