McDonald Elementary PTA

Decision Making Matrix

For use with the following types of decisions:

- Whether to devote resources to an activity outside our usual activities *(examples: Starbucks Christmas giving program)*
- Whether to articulate a position on an issue *(examples: school closures, bond measures, latte tax for education, etc.)*
- Whether to fund a new/unfunded request *(example: music for International Night)* or to increase an existing funding request

Up-Front Guidelines:

- Anyone in the McDonald school community can bring a request to the board.
- People making a request should consult the school calendar to make sure there are no date conflicts; include solid budget figures; and submit the request in writing at least two weeks before the next board meeting. (http://www.mcdonaldpta.org/live/collection/events)
- No one board member should make a decision on behalf of the board, nor should any board member indicate the board's likelihood of approving a decision before it's been presented to the full board.
- A board member who has a conflict of interest in the decision making process, can provide information but must abstain from a final vote.
- Requestors should be allowed to stay in the meeting for the discussion because board meetings are open to all.
- PTA activities must have PTA board approval in advance; committees should make sure their activities fall within PTA guidelines. Checks for PTA all-school activities should be made out to PTA instead of an individual parent.
- Exceptions to the guidelines in this document will arise and will be considered on a case-by-case basis.

Decision Points

1) Does the decision fall within the PTA's traditional purview? *(e.g. Support for student tutoring)*

a) If no, we need to
    i) Designate the decision to the appropriate decision-maker – BLT, principal, etc. *(e.g. further tutoring requests)*
    ii) OR defer the request

2) Does the request fit within our current goals (*student academic /enrichment support, community building for families, teacher support)?*
    a) If no, does it support a traditional PTA goal? *(e.g. something not specifically stated in current goals, but traditionally supported by PTA. (Something that benefits the school or families)*

3) Is the request being made on behalf of a PTA committee?
    a) If no, is there strong leadership in place to support the activity?

4) Does the activity serve a large proportion of our community?
    a) If no, can it be expanded? *(e.g. a Spanish festival that was not originally designed for attendance by all McDonald families, but was changed to welcome all.)* If the activity is too limited, the request most likely will not be approved.

5) Does the request conflict with existing PTA activities? *(e.g. it would require competing volunteer resources or parent donations, or cause a schedule conflict)*
    a) If yes, has the requestor explained how to resolve this conflict? If not, the activity most likely will not be approved.

6) Does the activity involve a political or religious organization?
    a) If yes, does it fall within PTA-approved guidelines for endorsement? *(e.g. PTA can state that it supports a school levy, but not a political candidate.)* If not, the activity most likely will not be approved.

7) Is there a parent/teacher/staff member willing to spearhead the activity?
    a) If no, the request most likely would not be approved.

8) Does the request involve an outside business?
    a) If yes,
        i) Is it with a business who we've partnered with before , OR, has the requestor thoroughly researched whether the business is a desirable partner? If not, the activity most likely will not be approved.

9) Does it involve funding?
    a) If no, go to #18.

10) Would funding the request adhere to McDonald and state PTA policy? *(*e.g. State policy is to not fund staff positions.) If no, request most likely will not be approved.

11) Does this request fall within the approved budget for the current school year?
   a) If no, should it be added to next year's budget as a permanently funded item?

12) Has the requestor developed a budget?
   a) If no, request cannot be approved until a budget is provided.

13) Will the activity generate an income?
   a) If yes, will the income offset the expenses?

14) Will the PTA take on a fiscal responsibility for the activity?
   a) If yes,
      i) Has the board approved the activity?
      ii) Is the activity a good use of PTA resources?
         If no, the request most likely will not be approved.

15) Has the requestor sought other resources to support the request? *(e.g. volunteers, donations)*
   a) If no, requestor needs to explain why. See #18.

16) Does the request involve re-allocation of funds? *(e.g. Using un-claimed teacher mini-grant funds to support teacher attendance at a conference;)*
   a) If no, go to next question.
   b) If yes, does the request correlate to the original intent of the funds? If not, the request must be considered independent of any re-allocation..

17) Does the request involve a dollar amount larger than $200?
   a) If yes, see #18.

18) Do we have all the information we need to make the decision?
   a) If no,
      i) Can the people submitting the request come to the board to make their request in person? *(This is recommended whenever possible.)*
      ii) If requestors cannot attend, they should submit their request in writing to the board, and include the following information: How the money would be used; why it is needed; who is requesting it; how much is being requested, when it would be spent, whether donations or other resources were sought. Request should be submitted two weeks before the board meeting.

19) Will the activity substantially improve attendance at, satisfaction with, or success of an event?
   a) If no, the activity most likely should not be approved.

20) Should teacher/staff input be solicited? *)*

21) Is the PTA Board authorized to make this decision on behalf of the community?
   a) If no,
      i) Is the PTA willing to endorse this request to the appropriate authority? *(e.g. BLT, principal or PTA community at large.)*