



**2023-24 Budget Planning Meeting Minutes**

**Date/Time: July 18, 2023, 7 PM-8:30 PM**

**Zoom Meeting ID: 874 8350 8394**

**Password: 590787**

**1. Attendees**

- a. James Yoon, Ann Carroll, Vivian Wang, Kelly Samson, Brenna Hughes, Sarah Eich, Karen Fingerman, Candice Burdick, Dan Wang, Willy Hsu, Tracey McHugh, Tracey Alexander, Kristen Muir, Katie Dietrich

**2. 2023 Dolphin Fest Planning**

- a. Brenna Hughes
  - i. Dolphin Fest context and history
    - 1. Fun, festive, community-building event.
    - 2. Not explicitly a fundraiser, though it does bring in money
      - a. In 2022, it cost \$5,000-\$6,000 to put on and brought in \$11,000
      - b. Much of the income comes from t-shirt sales
  - ii. Recommends scheduling Dolphin Fest in Fall 2023 to kick-off the year. This avoids holiday rush. Sunday is best to avoid sports.
  - iii. Brenna volunteers to be lead coordinator
  - iv. Discussed ideas for combining Dolphin Fest and Jog-a-thon, since both are likely to be Fall events.

**3. 2023 Jog-a-Thon Planning**

- a. Vivian Wang
  - i. Jog-a-thon history and context
    - 1. Coordinated by Vivian Wang and Kelly Samson in 2022
    - 2. Grossed \$35,000 in 2021, and \$29,000 in 2022 (\$30,000 in income, \$1,000 in costs)
    - 3. Strong fundraiser relative to costs.
    - 4. Becoming easy to replicate each year.
    - 5. Scheduling during school day makes it convenient and ensures high participation rate

- ii. 2023 Timing
  1. September is best for weather
  2. Vivian and Kelly are most available toward beginning of school year
  3. Day of week: Avoid Wednesday due to early release

#### 4. Discussion of Fall event scheduling (Jog-a-Thon and Dolphin Fest)

- a. Vivian: Would be risky to combine with Dolphin Fest. Dolphin Fest happens on weekend, so participation could be lower, resulting in lower income
- b. Ann: Clarified that a combination of jog-a-thon and Dolphin Fest would be sequential - e.g. jog-a-thon happens during school, fundraising totals announced and celebrated at Dolphin Fest.
- c. Brenna: Indicated that combining events might mean cutting the fun run from Dolphin Fest, which could be ok, since it is the hardest part of Dolphin Fest to coordinate. However, fun run is associated with t-shirts, which people look forward to and bring in income.
- d. Sarah E: Teachers help spread word about Jog-a-Thon and Dolphin Fest
  - i. Market at back to school night with slides.
    1. Sarah E. will update slides if PTA provides finalized info
  - ii. PTA provides Canva flyers for classroom windows
  - iii. Teachers send announcement in their newsletters Conclusion: Dolphin Fest should be in Fall of 2023 and will be a good kick-off event for year. Dolphin Fest and Jog-a-Thon will not be combined into one.
  - iv. Proposed dates:
    1. Jog-a-Thon: Thursday, September 21
    2. Dolphin Fest: Sunday, October 1

#### 5. Auction Planning

- a. Ann Carroll
  - i. Auction history
    1. 2023 was "Auction Lite" at Ruhstaller
    2. In 2023, spent \$7,000, brought in \$21,000. Grossed \$14,000.
    3. In 2021 (pre-pandemic), "Full Auction" grossed \$40,000
  - ii. 2024 planning
    1. Host in February/March 2024
      - a. Must space about a year since prior auction to avoid soliciting companies for donations twice in same year
        - i. However, some companies made donations well ahead of 2023 auction and many were not

contacted at all

- ii. By April, many companies have made donations already for the year to other schools.

- b. Volunteer availability decreases by April due to fatigue

2. Need to decide whether to do "Auction Lite" (as in 2023), or "Full Auction"

- iii. Discussion:

1. Vivian: in 2023, Korematsu held event at Wildhorse, which did not charge for venue, only charged for food and drink.
2. Sarah E: Participated in auction planning for Korematsu. It was intended as "Auction Lite" but was more of an "Full Auction," because there was a lot of work and money needed for decorations, table and chair rental, etc. Rustaller does not require decorations.
3. Tracy A: Food was expensive at Rustaller

- iv. Conclusion:

1. Tracy Alexander and Willy Hsu will form Auction Planning committee in August and request other volunteers to join

## **6. 2023-24 Movie nights**

- a. Ann Carroll

- i. Intend to host more frequently this year
- ii. Must make reservations for MPR for Fridays soon
  1. October 27 already reserved for Spooky Movie Night

- b. Sarah Eich

- i. Suggests possibility of trick-or-treating at teacher classrooms before Spooky Movie Night
- ii. Opening school before movie night for trick-or-treating could be a community event that generates funds through concession sales.
- iii. Will require teacher buy-in. Sarah E will gauge interest among teachers in opening their classrooms to trick-or-treating
- iv. Parent-Teacher Conferences next week
- v. Book Fair next week
- vi. Lindsey Mandville is reaching out to teachers to confirm times to start the classes in January

## **7. Overall 2023-24 Budget Planning**

- a. James Yoon

- i. 2023-24 fundraising goals:
  1. Must raise an additional \$25,000-\$30,000 more than in 2022-23 to meet budget
    - a. Biggest events will be Jog-a-Thon, Dolphin Drive, and

## Auction

- b. Movie nights and Nom Nom Wednesdays are opportunities to expand on
- c. Remind families about Scrip program at Nugget

## ii. 2023-24 Budget

1. Overall budget increased by 50% this year
  - a. Departmental grants and field trip budget are higher this year.
  - b. Changes mainly due to return to normalcy after Covid. Budget looks more like pre-Covid years.
2. Will put budget on NDE website to increase parental awareness and understanding of PTA programs
3. Increase administrative expenses in 2023-24
4. Create more subdivisions in budget to understand where money is going
  - a. E.g. on vague "Community Building" line item
5. Separate Art program and art program reimbursables line items
  - a. So far, no update on Prop 28 funding for arts. PTA will plan to fund arts programming with June Wood and Mindy until we learn more about Prop 28 funding
6. DEI initiatives
  - a. Library used funds to buy books in past and may be receiving grant from a separate source. Open for staff recommend other uses of money
  - b. Parents have asked for more DEI opportunities
    - i. E.g. education events throughout year, such as community groups providing programming such as Black Student Union, AAPI events, Taiko Drumming and brining community cart back
  - c. Ann: PTA wants to have funds available in DEI line item in case volunteers are interested in assisting. Does not need to be limited to buying books for library.
7. Departmental grants:
  - a. Maintain \$500 per class/\$1500 per grade level
  - b. Establish new budgets for 6 additional categories
    - i. Special Ed, EL, Speech, Science, Reading, Counseling, SWIM incentives by class

- c. Expansion is big increase in budget, putting more pressure on fundraising.
- d. Karen: Due to increase, option to reduce amount of money paid out at beginning of year, with option to release more later in year. Important for teachers to know at the beginning of the year how much is available to spend.
  - i. James: Based on this, James decreased departmental budget with option to increase later.
- e. Sarah E: Explained transition to teacher managed SWIM incentives, with reduced importance of school-wide incentives. SWIM expenses will go down as teachers consider some intangible, no-cost items (especially for kids at older grade levels). Sarah E requests \$200 per class - Kinder and TK will receive \$200 per grade level (not per class). Sarah E. requests \$1,400 for SWIM incentives. Recommends reducing PBIS line item down to \$1,500.
  - i. Sarah E, Karen, and Candice will remind teachers that PBIS amount is on top of SWIM incentives provided within Departmental Grants.
  - ii. For PBIS funds, Sarah E is uncertain how much money comes from PTA and how much from Title 1 and Site funding. Sarah E will investigate this question and get back to PTA.
  - iii. Due to transition to teacher-managed SWIM incentives, it is unclear how much money will be needed. Teachers will keep track of expenses this year and PTA can adjust next year.
    - 1. Lower grades most likely to need more funding than higher grades.

#### 8. Field trips

- a. Sarah E: Field trip fund typically requests \$25-\$30 voluntary donation
  - i. During Covid, PTA funded Paleotechnics, as substitute for Walker Creek. In 2022-23, PTA funded both. PTA should decide whether Paleotechnics should be continued. Possible to

ask 6th grade to host own fundraiser to support it if they want to continue it.

- b. Karen: Should emphasize field trip fund contributions on voluntary basis at beginning of school year events (e.g. Paperless Parade, Back to School Night). Last year, we were too late in making this request. Coordinated efforts by teacher and PTA to make this request.
- c. Candice: Field trip fund donations may come directly to school or PTA. The amount the office receives offsets what the PTA provides for field trips.
  - i. It is ok for parents to pay by check to school if digital store is too hard to use. Teachers can advertise this at back to school night.
- d. Conclusion: James confirms leaving Paleotechnics and Walker Creek as separate line items, though it represents big increase in budget.
  - i. Walker Creek was not part of PTA budget last year, but should be moving forward.
  - ii. 6th grade should be encouraged to do own fundraising for Paleotechnics.

#### 9. Fundraising Budget

- a. Anticipate same or more needs for fundraising, due to bigger budget and because Dolphin Fest is returning.
- b. Budget increased to \$9,000

#### 10. Fitness Budget

- a. OK to decrease this year as last year had higher than usual reimbursement needs

#### 11. Garden Beautification

- a. Not spent last year, but will be kept in budget in case there are volunteers

#### 12. Library and Books Count

- a. Budget item will be maintained
- b. Sara E: Books Count did not happen last year. Will check with Grace (librarian) to see if it will happen this year.

#### 13. May Is Bike Month

- a. Leaving budget item the same in hopes of greater volunteer involvement
  - i. Past years had a lot of activities in May. May is

Bikemonth and Active4Me incentives were separate. Volunteer needed to bring May is Bike Month activities back.

- ii. Budget can be increased if necessary if volunteers do emerge

#### 14. B Street Theater

- a. Karen: Said that we don't need to stay with B Street Theater. Teachers can suggest other, lower cost alternatives. Important to take advantage of our new space for performance and all school events. Ideas include Taiko Drummers or Voice of the Woods.
- b. Sara E: Will survey staff early in school year to solicit suggestions from staff.
- c. James: Budget set at \$1500. Amount can be changed based on needs.

#### 15. Touch of Understanding

- a. Important to keep as line item that is separate from general field trips.

#### 16. Performing Arts

- a. Music amount set based on Lindsey Madville's proposal, but subject to change. Budget includes Lindsey's maximum proposal
  - i. 4th-6th, September - May: Pops choir, after school
  - ii. Grades 1-3, during school day, ending in performance in May
- b. Sarah E: Everyone is in limbo waiting to hear what will happen with VAPA funds and how this will impact need for PTA funding. May get news on VAPA program by August 1. Rumor is that VAPA funding may focus on Music.
  - i. PTA should provide feedback to Lindsey that we may only want Pops Choir. Grades 1-3 programming may not start until January. Staff won't provide feedback until end of September when there is an understanding of what DJUSD/VAPA will provide.
- c. James: Recommends keeping maximum amount in budget. Can be revised at later date. Will not provide as grant at beginning of school year, but will keep

amount in budget.

17. School directory

- a. Keep digital, but aim for better distribution.
  - i. Distribute via stickers on kids newsletter, etc.

**8. Flag Football Proposal**

- a. Kristen Muir presented proposal for third-party organization to provide recess sports option
  - i. Interest in organized lunch time activities
  - ii. Skyhawks or other company could organize activity for a fee
  - iii. Skyhawks proposal for flag football:
    - 1. Cost \$1,250
      - a. 1 day a week for 8 weeks in the Fall, 2 coaches, all equipment covered
    - 2. Option for Skyhawks to provide summer programs on NDE fields with fundraising/revenue sharing option
  - iv. Uncertainty over how long DJUSD funding for Kristen's fitness activities will last. So transitioning to third-party organized activities would be good option for future.
  - v. Sara E: Likes the idea and appreciates option for kids who don't have opportunity for organized sports outside of school. Teachers have strong interest in organized playground activities for 4th through 6th graders.

**9. AB506 Screening**

- a. Ann Carroll
  - i. Will reach out to Sarah Roseen and DJUSD to see if DJUSD will take on screening. Screening would cover Kindergarten through High School, so parents can pay once to cover all volunteering while their children are in school.

**10. Final thoughts**

- a. Form events committees at beginning of school year
- b. Make effort to boost volunteerism and capitalize on early school events
- c. Sarah E. will update slides for teacher Back to School Night presentations
  - i. Requests finalized info from PTA

**11. Meeting adjourned at 8:30 pm**