PVA PTO 2020-2021 Mid-Year Review

February 2021

Agenda

1H Review

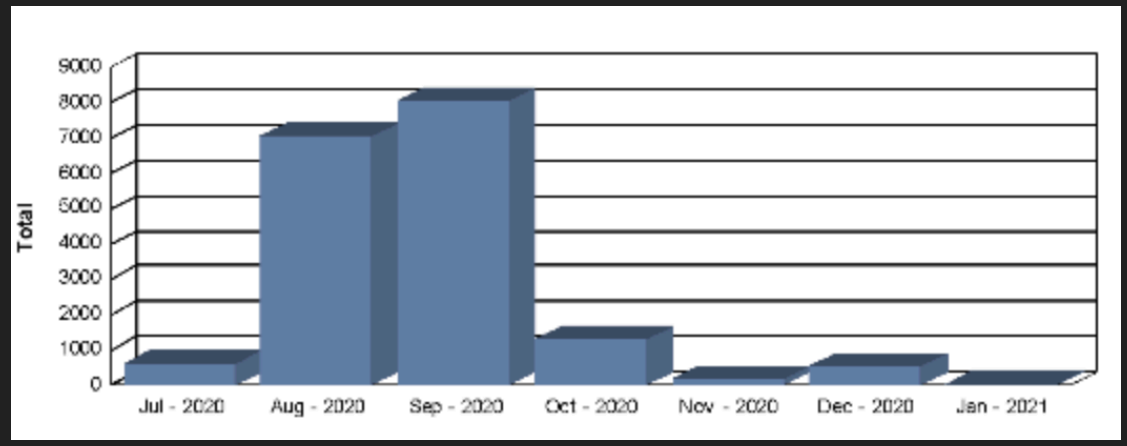
- Programs
- Initiatives
- Budget Reconciliation

2H Looking Ahead

- Elections

Membership

- 22 Faculty and Staff Members
- 127 Bronze Members
- 60 Silver Members
- 50 Gold Members
- 16 Platinum
- 5 Bobcat of the Year



Total Amount Raised - $17,851

Expected Budget - $31,110

Delta – (-$13,259)

Partners in Education

- 16 Partners in Education
  - 5 Benefactor Partners
  - 2 Gold Partners (In Kind)
  - 2 Silver Partners (1 In Kind)
  - 7 Bronze Partners

Total Amount Raised - $23,250

Expected Budget - $27,750

Delta – (-$4,500)

- Kumon
- The Shirt Guru
- Brain Balance Centers
- Smiles by Glenos & Hadgis
- I9 Sports
- Mathnasium
- Dr. Parvonae Shaw
- The Elf Brigade
- Creative Me Art Studio
- Rice Orthodontics
- Endless Summer Realty
- Coastal Dermatology & Medspa
- Cara Ferreira, Keller Williams
- Matt and Naomi Wilkinson, Re/Max
- Shantel Rose, Coldwell Banker
- Chilled Flavors

Apparel

- Transitioned Inventory to Online Sales in Fall
  - Pulled and delivered 95 orders
  - Total Online Sales - $3,086
- November Pop-up - $2,140
- February Pop-up - $611
- Spring Pop-up – TBD
- Spring Store - TBD

Total Earned – $5,837

Expected Budget - $10,000

Delta – (-$4,163)

- Status of inventory
  - T-shirts left in less popular sizes
  - Decision will need to be made at the end of the year regarding remaining inventory and plan for apparel next year
  - Chair for 2021-2022 is needed

Fundraising

- School Supply Kits
  - 686 kits purchased
  - Earned - $2,431
  - Budget - $3,000
  - Delta – (-$569)
- Gala – Cancelled
- Bobcat Bolt
  - $14,660.00 earned to date
  - Budget - $74,895
- Birthday Book - $120 earned
- Birthday Marquee – Handed off to NJHS; $2,300 raised
- Charleston Wrap - $7,668.50 earned
- Pride Rock – Launched in November - $850 earned
- Fall Book Fair – Sold $771.06, $12,299.88 total Scholastic dollars in account
- Spring Book Fair - TBD

- Earned - $10,738.50
- Budgeted - $13,206
- Delta – (-2,467.50)

YTD Initiatives

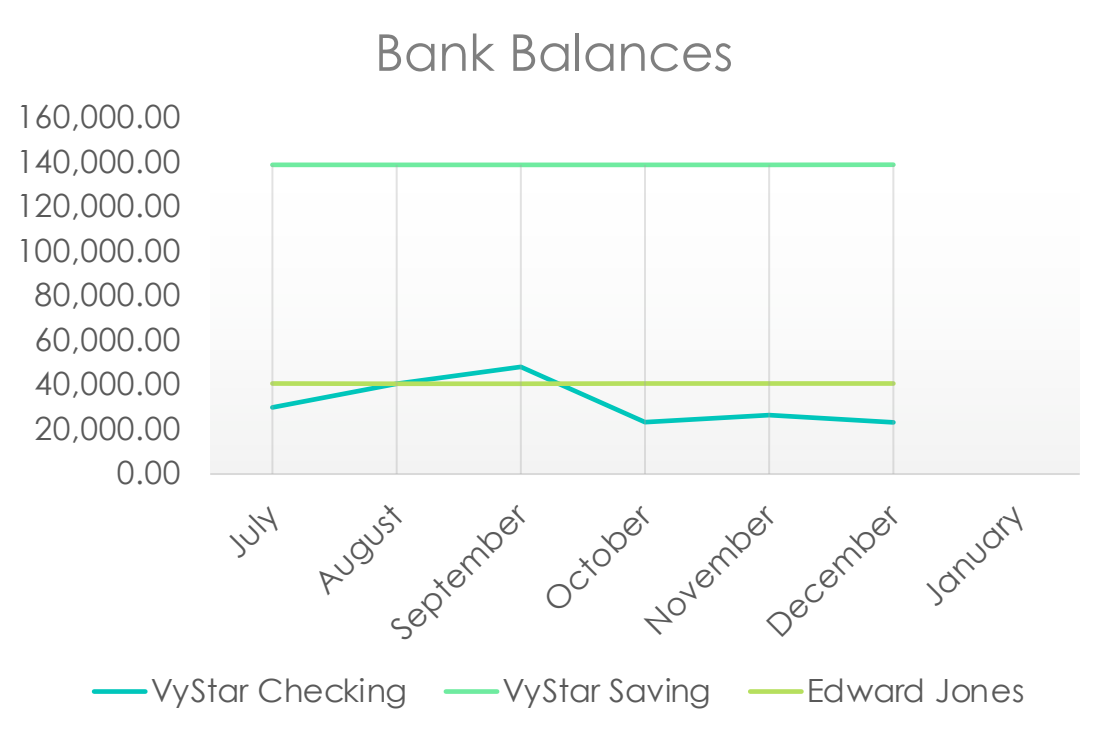
- Back to School
  - Support on Teacher Training Days – Provided individually wrapped breakfast and lunch for onsite
  - Folders – Created and distributed 2300 first day folders
  - Purchased Car Tags and distributed in first day folders
  - Purchased and distributed 310 "Welcome to Middle School" planners for 6th grade

- Teacher Support / COVID Transition
  - Purchased and distributed Purell and Clorox wipes for all classrooms
  - Purchased and distributed PVA branded masks to all faculty and staff
  - Purchased and distributed $25 Amazon gift cards to all classrooms for classroom set-up
  - Organized the donation of recess supply kits for each classroom and covered the additional costs to ensure equal distribution
  - Purchased and distributed complete sets of Sunshine State books for all classrooms
  - Purchased Scholastic newsletter subscriptions

YTD Initiatives

- Additional Support
  - Character Counts - $1000 per month allotted to ensure program can continue
  - Teacher Grants – Application process implemented, board approved and distributed all teacher grants
  - School House Set-up – Funded purchase of lanyards
  - Funded Teacher of the Year Event
- CAT Art – Resource Period for K and 1st
  - 70 minutes on Wednesday Mornings at 9am
  - Utilize Room Parents as Resource Assistant where possible

Finance Update



- 3 active accounts
  - July 2020 - $209,537.08
  - January 2021 - $202,917.67
- Events cancelled in 2H of last year and conservative spending this year has kept the balances consistent and healthy
- PVA bylaws –
  - **Section 5: Reserved Funds.** At fiscal year end the Executive Board shall reserve twenty-five hundred dollars ($2,500) as a minimum bank balance, plus additional expenses expected to be distributed in the first two months of the following school year.
  - Legally there is no maximum to the amount that can be rolled over to accommodate these expenses.

Finance Update

- Starting Balance - $209,537.08
- Money Earned - $38,001.10
- Money Spent - $74,866.43
- Current Balance - $202,917.67

- Money Needed for Remaining PVA 2020 - 2021 Initiatives - $30,455
  - $12,855 – Bobcat Bolt Expenses
  - $5100 – 5th and 6th Grade Graduation Gifts
  - $3000 – 8th Grade Graduation Gifts
  - $6500 – Teacher Appreciation Week
  - $3000 – Character Counts
- Money Earmarked for MM - $5k
- Scholastic Dollars
- Money Earmarked for PVA 2021-2022 - $45k
- Total needed - $80,455
- $202,917.67 (Current Balance) – $80,455 (Total Needed) = $122,462.67 (Remaining Balance)

Elections

Current Board

- Cole Naldzin – 2nd Year President
- Kay Crouch – 1st Year President
- Purvi Sanghvi – 1st Treasurer
- Open – 2nd Treasurer
- Pamela Kelleher Rydh – Lower School VP
- Anne Chance – Upper School VP
- Blaire Carney Smith – Recording Secretary
- Andrea Ramirez – Corresponding Secretary
- Jill D'Amato – Past President

2021-2020 Board (Without Rezoning)

- Kay Crouch – 2nd Year President
- TBD – 1st Year President
- TBD – 1st Treasurer
- TBD – 2nd Treasurer
- TBD – Lower School, VP
- TBD – Upper School, VP
- TBD – Recording Secretary
- TBD – Corresponding Secretary
- Cole Naldzin – Past President

Nominations

- Nominations are being accepted now to fill the upcoming open PTO board positions at PVA. Anyone who will have a student attending Palm Valley Academy fall of 2021 is eligible, regardless of their current semester enrollment status (e.g. those in Florida Virtual and St Johns Virtual currently are eligible if they are returning to PVA in the fall). Simply email your/your nominee's name, position(s) of interest, and contact information to election@pvapto.org.
- We will be announcing the first wave of nominations at the March 8th general meeting but will be taking nominations through April 12th when the elections will be held.

Election Process

- All nominated parties will be added to a Survey Monkey survey before the start of the April PTO meeting
- During the meeting all attendees will add their name and whether or not they are a PTO member to the chat, as usual
- A member of the elections committee will validate PTO members during the course of the meeting
- The Survey Monkey link will be opened at the beginning of the meeting and shared at the meeting.
  - It is a requirement of the by-laws that you be in attendance and a current PTO member to vote.
- Ballots will be kept confidential to all except the Corresponding Secretary, who is responsible for tallying the votes.
- The survey link will be closed at the end of the standard PTO meeting however the Zoom meeting will remain active while we validate membership and tally votes. We will announce results as we have them available.

All Board Members

- Attend meetings.
- Attend and help with PTO functions and events.
- Represent the school and its PTO in a positive and professional manner.
- Oversee and guide their assigned committee chairs, initiatives, etc. and ensure that tasks are completed. Report to the board on the standing of all assigned committees and/or initiatives.

The Role of the President

- Length of Term: 2 years (May 2021 - May 2023)
- Preside at all scheduled General PTO Meetings and Executive Board meetings.
- Recruit, place, and organize all chairpersons of standing and special committees
- Delegate appropriate duties to the elected officers.
- Exercise contract-signing authority for the Palm Valley Academy PTO.
- Serve as the official representative of the PTO at meetings outside of the organization, authorized to act on behalf of the PTO.
- Be an ex officio member of committees except the Nominating Committee.
- Coordinate the work of the officers and committees of the PTO so the objectives for the year may be accomplished.
- Specific committee oversight includes, but is not limited to: Volunteer Coordinator, Partners in Education, Membership, Hospitality, Apparel, 1st Day of School Supplies/Folders, Bobcat Bolt, Gala.
- Perform duties required to effectively plan for, operate, delegate, measure, develop, and achieve the goals and objectives of the PTO.
- Co-sign or initial all Palm Valley Academy PTO checks with treasurer.
- Work with Treasurer to review monthly reconciliation and Quickbooks reports.
- Meet with the Palm Valley Academy Principal and serve as liaison between the PTO and school leaders.
- If co-presidents are elected, responsibilities of section 2 will be split among co-presidents as they deem fit.
- While you will have committee oversight responsibilities, the first year of the two-year term will be under the guidance of the 2nd year term President to allow for learning curve.

Special 2021 Role: 2nd Year President

- Length of Term: 1 year (May 2021 - May 2022)
- ***Due to rezoning, the 2nd year President slot will be vacated for 2021-2022; and the remaining 1-year term needs to be filled. This position is intended to be the trainer for the 2-year term open position, so extensive knowledge and experience is necessary. This individual will be responsible for all elements listed above plus have the following qualifications:*
- Minimum of 1 year of experience in a chair, committee, or board position in the PVA PTO

The Role of the Upper School, VP

- Length of Term: 1 year (May 2021- May 2022)
- Assist the President.
- Perform the duties of the president if the co-presidents are absent.
- Oversee development and coordination of PTO activities focused on and associated with the Upper School.
- Help guide the activities and communications for the middle school. Serve as liaison to the middle school teachers.
- Oversee and guide assigned committee chairs, initiatives, etc. and ensure that tasks are completed. Report to the board on the standing of all assigned committees and/or initiatives.
- Specific committee oversight includes: Bobcat Brigade, Color Run, two upper school dances, including 8th grade dance, and Spring Fun Fest.
- This position does not mandate nor guarantee the need to be President next year.

The Role of the Lower School, VP

- Length of Term: 1 year (May 2021- May 2022)
- Assist the president.
- Oversee development and coordination of PTO activities focused on and associated with the Lower School.
- Oversee and guide assigned committee chairs, initiatives, etc. and ensure that tasks are completed. Report to the board on the standing of all assigned committees and/or initiatives.
- Specific committee oversight includes: Bobcat Bolt, Teacher Appreciation, Book Fair, Fall Family Night, 5th Grade Celebration.
- This position does not mandate nor guarantee the need to be President next year.

The Role of Corresponding Secretary

- Length of Term: 1 year (May 2021- May 2022)
- Create, coordinate and execute communication plan for members which can include, but is not limited to, methods such as broadcast emails, social media, PTO newsletter, etc.
- Create, coordinate and execute communication plan for general school population which can include, but is not limited to, methods such as the school newsletter, school messenger system, school flyer distribution system, school marquee (if approved), local media, bulletin boards, social media, PTO webpage, etc.
- Oversee and guide all communication related to social media, webmaster, press parent, etc. to ensure the communication plan is executed. (NOTE: There is a separate webmaster. This position collaborates with the webmaster.)

The Role of Recording Secretary

- Length of Term: 1 year (May 2021- May 2022)
- Record the minutes of all General PTO Meetings, distribute them to the other board members in a timely fashion for review and approval to post. Once approved, send meeting minutes to webmaster for posting on the PTO site.
- Keep records of Executive Board meetings and make sure records are available upon the request of any Member.
- Act as custodian of PTO records, maintaining a permanent file of all minutes, agenda, reports, the charter, the by-laws and any correspondence.
- Conduct the correspondence of the PTO as requested.
- Perform such other duties as many be delegated to him/her by the President and/or the Executive Board.

The Role of Treasurer

- Length of Term: 2 years (July 2021 - June 2023)
- Lead the annual budget development process.
- Be responsible for the timely deposit of PTO funds.
- Be responsible for the maintenance of the books of accounts and records.
- Keep a full and accurate account of the receipts and expenditures.
- Make disbursements in accordance with the approved budget or financial expenditures:
- Make available a financial statement at all General PTO Meetings and at other times when requested by the Executive Board.
- Provided monthly reconciliation and Quickbooks reports at the Board meetings.
- File annual IRS return required for 501(c) (3) groups.
- Renew the PTO incorporation with the state.
- Strictly adhere to the guidelines and protocols that govern the St Johns County school district with respect to all aspects of the handling of funds and audits.
- Follow any specific guidelines set forth in the Palm Valley Academy PTO Standing Rules.
- Perform such other duties as may be delegated to him/her.

Special 2021 Role: 2nd Year Treasurer

- Length of Term: 1 year (July 2021 - June 2022)
- ***The current 2nd year treasurer slot has been vacated with a year remaining in the term, so nominations are being taken to fill this final year commitment. This individual is intended to be the trainer for the 2-year term open position and will be responsible for all of the elements listed above plus have the following qualifications:*
- Minimum of 1 year of experience in a chair, committee, or board position in the PVA PTO
- Working knowledge of or desire to learn Quickbooks

Election and Transition Timeline

- Nominations open – February 1st
- Initial nominations announced – March 8th PTO meeting
- Nominations closed – April 12th
- Vote – April 12th PTO meeting
- Transition of Knowledge Begins – April 13th
- New board officially begins duties – May 1st
- Old board officially concludes term - May 31st