Oakridge Middle School PTO 2022-2023 September 8, 2022

1. Call to Order – Quorum
   * + 1. Michelle Mullman – President
       2. Stephanie Feldman – Treasurer
       3. Jaime Hamlin- Secretary
       4. Chrissy Beard – VP
       5. tbd– Teacher GLR
       6. April Varga – Teacher Representative 6th
       7. tbd – Teacher Representative 7th
       8. tbd - Teacher Representative 8th
       9. Ronna Smith – Principal
       10. Dede Brownlee – Parent GLR 6
       11. Jaesen Petretta– Parent GLR 7
       12. Jennifer Seidner– Parent GLR 8
2. Attendee Roll Call & Introductions
3. Notice of Meeting: 8:03am Thursday September 8, 2022
4. Approval of minutes from August 2nd meeting – not needed
5. **New Business:**

1. Calendar Review

* 7th and 8th Grade Curriculum Night
* October 4th: Fall PTO Meeting/Coffee (principal lead, safety discussion, election support)
* Silent Auction Event – October
* October - Parent – Teachers Bash Event (to be discussed)
* October – Dinner and Manners Event (to be discussed)
* October – Spirit Night Dinner (to be discussed)

2. Committee and Board Roles

* Committee Needs Discussion – Sign Up Genius is Up and Need to Add School Volunteer Needs
* Teacher Reps – April Varga (6th)
* Parent Reps – Vote in Dede Brownlee, Jaesen Petretta, Jennifer Seidner

3. Teacher Wishlist Discussion – Process and Budget

4. School Spirit Store Update

* Updates
* Staff T-Shirt Design Discussion, Staff Logo Discussion, Current Styles in Larger Sizes for Adults

5. Financials Review

* Prelim Budget Review
* Spending Request Process
  + Request from Mr. Howell: Cross Country Entry Fees for upcoming tournaments
* By-Law discussion
* Banking Discussion
* Business Sponsorship Needs and Banner Update

6. Updates

1. *Fall Festival and Silent Auction– discussion above*
2. *Winter Walk-a-thon – n/a*
3. *Holiday House – n/a*
4. *PTO Enrichment – Odyssey, LEGO (need to meet with Club Coordinator)*
5. *School Spirit Store and Inventory - above*
6. *Kindness Korner - n/a*
7. *Amazon Smile – n/a*
8. *Staff Appreciation – n/a*
9. *Bulldog Sponsors – Advertisements, Banners, Sponsors, Spirit Nights*
10. *Communication – website, newsletters, emails*

6. Open Discussion

7. Next Steps Review & Adjournment

Note: Each Agenda item will first be discussed by Board of Directors only. Comments/Questions will be taken, *during Open Discussion* (limit 3 minutes each) after agenda items have been voted on by board.

**PLANNING DISCUSSION NOTES** *Submitted by Michelle Mullman, President*

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| **ITEMS** | **SUMMARY** | **NEXT STEPS** |
| **CALENDAR REVIEW**  **2022-2022** | * Board Meetings – 1st Tuesday of Month at 8:00am – on site * SEPTEMBER:   + Fridays: Spirit Wear Sales   + Kick off Enrichment Programs (Odyssey and First Lego League, Pickleball) * OCTOBER:   + Fridays: Spirit Wear Sales   + Oct 4: Fall PTO Meeting   + Oct 24: Silent Auction Kicks Off   + Oct 28: Silent Auction Ends * NOVEMBER:   + Fridays: Spirit Wear Sales   + Family Dinner Night Out – Sponsorship Night   + PTO Community Volunteering Day Out   + PTO Giving Tree Launch * DECEMBER:   + Holiday House Event   + PTO Giving Tree   + Staff Appreciation Event * JANUARY:   + Fridays: Spirit Store * FEBRUARY:   + Fridays: Spirit Store   + Walk A Thon   + PTO WINTER Coffee for Parents Virtual and In Person (AM)   + Staff Appreciation – Souper Bowl * MARCH:   + Fridays: Spirit Store   + Walk A Thon Prize Distribution and Event   + Family Dinner Night Out   + Community Volunteer Event * APRIL:   + Fridays: Spirit Store   + PTO Planning   + 8th Grade Formal – Dinner and Dance * MAY:   + Fridays: Spirit Store   + Staff Appreciation Event   + 8th Grade Celebration Events   + End of Year Celebrations by grade | Finalize Dates and Update Website |
| **FUN PTO IDEAS** | * Everblades Night – Winter * Fall Festival Family Night – October (Homecoming Theme) * Winter Ball - Dance * Spirit Nights (Dinner) * Defy / Rollerskating / Golf – Winter Walk A Thon Prize and School Spirit Night * Silent Auction Prizes * Talent Show Night? * Community Volunteering Events * 8th Grade SUN N FUN? Off Campus Celebration? * 8th Grade Graduation Event? | * Discussion |
| **BUDGET, SPENDING REQUEST DESIGN** | * Discuss Budget for year (approach to look at adjusted budget each month) * Process for approvals of spending requests:   + Budget to include amount for each grade level, overall clubs and teams, music/theatre/PE   + Every request from staff must begin by discussion with Admin.   + Next Step is to submit request via PTO website. Request will include links to items seeking for purchase   + PTO receives and will reach out to Ronna for approval and discussion if needed   + Once approved, board will need to approve for requests of $200 (by-laws need to review) | * Create approval page on PTO Website * Communicate to Staff |
| **FINANCIALS**  **JULY – AUGUST 2022** | * August starting Balance: $37,567 * Aug Expenses: $20,478 * Aug Revenue: $14,716 * Balance estimate will be in start: September $30,999   ***Estimated***   * Expenses in September 2022: $10,000 * Sales in September: $5,000 | * Publish financials on website |
| **VOLUNTEER COMMITTEES / PTO Board Members** | * Holiday House & Spirit Store – Michelle, Jaime, Chrissy, Jen S, Rob S * Staff Appreciation Events – Jaime (+) * Business Sponsorships – Michelle (+) * Fall Fun Event – (++) * Fall Fundraiser – Michelle, Stephanie, Jaime, Chrissy, (+) * Winter Walk A Thon - Michelle, Stephanie, Jaime, Chrissy, (+) * 6th Grade Reps – Dede Brownlee, TBD * 7th Grade Reps – Jaesen Petretta, TBD * 8th Grade Reps – Jennifer Seidner, TBD * Enrichment Coaches - TBD * Community Events – TBD | * Add more volunteer needs to Sign Up Genius (school specific needs) * Reach out to volunteers to organize teams * Create deliverables * Michelle to begin reaching on 9/8 |
| **Event: Parent-Teacher-Student BASH** | * Purpose is to draw attention to the upcoming elections of school board * Encourage parents to vote * Show Bulldog Spirit * Ideas include: Friday morning Bulldog Cheer after school in courtyard and balconies before bell rings. Parents invited to come to campus and join/stay in cars and honk for their support * PTO to hand out stickers to kids (student design) to remind parents to vote * PTO to provide info in newsletters and at Oct 4th Parent Meeting |  |
| **TEACHER WISHLISTS** | * Complete wishlist collection by 9/10/2022 (April and Ronna collecting wishlists) * PTO to begin shopping on 9/9/2022 ($100 for classroom teacher, $50 for student support, $200 for PE/Music/Theatre) * Add links to PTO website and communicate to parents | * Complete Wishlist Links Collection * Shopping – complete by 9/30/2022 |

**MEETING DISCUSSION & NEXT STEPS** *Submitted by TBD, Secretary*

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| **ITEMS** | **SUMMARY** | **NEXT STEPS** | **APPROVAL NEEDED** |
| **Budget** | * The P&L I shared this morning did include wishlists funds per grade. This was $2,000 per year per grade. * Misc Wishlists for Other Teaching staff currently has $0 funding * Related Arts teams currently have $0 funding * The preliminary budget was approved by the board with the modifications to add wishlist not to exceed $7,000. * P&L per Stephanie Feldman is now in the attached document.     Please approve   * The preliminary budget was approved by the board with the modifications to add additional funding to 6th-7th-8th grade, staff support and related arts budget not to exceed $7,000. This funding will include wishlists for Related Art Teams, Staff Support Teams and will bump up the misc. spending for the grade level by $1500 each.   Please Note   * Wishlists - the budget currently cover Fall Spending with some potential left over for additional wishlist spending in the Spring. If our revenue sources are met the board can approve additional Spring Spending. However this is not in the budget as of now and therefore we are not making a committment to that one, yet. | * Approval Required by email for Budget * Preliminary budget was received during the meeting | **YES, Passed:**  *Motion made by*:  Michelle Mullman  1st approved:  Stephanie Feldman  2nd approved:  Ronna Smith  **YES, Passed:**  *Motion made by*: Michelle Mullman  1st approved:  Stephanie Feldman  2nd approved:  Ronna Smith |
| Spending Requests | * Mr. Howell’s spending request was approved by the board. Michelle to reach out for next steps. | * Confirm next steps with Mr. Howell | **YES, Passed:**  *Motion made by*: Chrissy Beard  1st approved:  Stephanie Feldman  2nd approved:  Michelle Mullman |
| **Other Financial** | * By - Laws to be sent to board. Further review at next board meeting with discussion on changes * Holding off on wishlist shopping until new bank is set up * ***PTO Approval Process*** - On PTO Website, a form will be added for any staff member to send a request to PTO. PTO will receive and forward to Ronna for her approval. Once approved, PTO will submit to board for approval. If the request is under $100 ??, President and Treasurer will align and approve. All other requests will require board sign-off. Even if requests is budgeted for, PTO board will be approving. Form will be available soon and link to be sent. | * By-Laws to be be emailed * Wishlist shopping start date TBD * PTO to set up Approval form online | n/a |
| **Business Sponsorship** | * Looking for a few good volunteers PLUS kicking off il Primo as our first big sponsor. Will put their ad in October newsletter. Looking for ads and banners. | * Need volunteers to run biz sponsorships | n/a |
| **Board Meetings and Parent Meetings** | * Email invite to be sent to board members * **October 4th Parent Meeting** - Zen Room - Ronna will be presenting | * Invites to be sent * PTO newsletter and social media to be sent out | n/a |
| **Fundraiser – Silent Auction** | October 24th - 28th  (1) Staff to begin collecting ideas for experiences  (2) PTO to begin requesting donations via newsletter and business community | * Info to be sent out next week in newsletter | n/a |
| **Middle School Bash Events** | * ***October (Friday Oct 11th 4:00 - 6:00)*** Middle School Bash after school Fall Festival Theme??   (1) il Primo pizza and waters served in cafeteria  (2) Games outside and in gym  (3) Music  (4) Sell candy and little items  (5) Tickets $10  (6) Volunteers needed to man the school  (7) Staff on campus to help (8) Limit tickets sold ??   * ***November (Friday Nov 4th 4:00 - 6:00)***   Middle School Bash after school - focus on Manners and Etiquette lesson for 30 minutes then fun!  (1) same as above  (2) add voting excitement ideas | * Alignment on dates * Volunteer needs and staffing to be secured * Logistics outline | n/a |
| **Get Out and Vote Campaign PTO Sponsored** | * PTO to sponsor Get Out and Vote campaign to bring awareness to election day. * PTO to run an online Canvas election (theme around Spirit Wear design OR something fun like Dunk a Teacher). * PTO to highlight election day info in all of the newsletters and donate get out an Vote stickers or buttons. | * Logisitics to be defined * Design of Vote Sticker or Button * Design of Canvas form * Social Media campaign | n/a |
| **Holiday House** | * need to discuss logistics, dates * Will PTO purchase items or hire a third party? | * Logistics to be discussed | n/a |
| **Staff Shirt** | * Ronna to send a design request for staff shirts. PTO will also ask teachers for special requests for sizes of current inventory. * Staff will order their sizes on the PTO website (and if color is a choice). | * Designs to be sent * Order process to be defined. | n/a |

**MEETING LOGISTIC NOTES 8/2/2022** *Minutes Submitted by*: Michelle Mullman

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| **ITEMS** | **SUMMARY** | **NEXT STEPS** | **APPROVALS** |
| * Call to Order | September 8, 2022 8:00AM  Web Ex / Oakridge Middle School | n/a | Michelle Mullman |
| * Attendee Roll Call | **Attendees:**  Michelle Mullman – President  Stephanie Feldman – Treasurer  Jaime Hamlin - VP  Chrissy Beard – Secretary  Ronna Smith – Principal  Dede Brownlee– GLR 6  Jaeson Petretta – GLR 7  Jennifer Seidner – GLR 8  April Varga – Teacher Representative 6th  tbd – Teacher Representative 7th  tbd - Teacher Representative 8th | n/a | n/a |
| * Notice of Meeting | **Meeting Called to Order at** 8:03am  **Quorum Present:** Yes | n/a | **YES, Passed:** |
| * Approval of minutes from last meeting | Waived the reading of the minutes from  August 2022 | * Upload the meeting notes to be available on PTO Website | **YES, Passed:** |
| * Open Discussion | * Next Meeting: October 4th, 2022 | n/a | End of Meeting at 9:33am. |

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