

Additional Region 4 ATPE Financial Assistance Request for Summit 2020

Name of Local: _____
 Date of Request: _____ / _____ / 2020
 Address of Local or Officer: _____

Print Name of Person Requesting: _____

Office Held: _____

Signature: _____

Phone Number: (_____) _____

Print Name of Additional Person Verifying Request: _____

Office Held: _____

Signature: _____

Amount of Funds in the Local's Savings Account: \$ _____

Amount rec'vd from State: \$ 0 Amount of local budget: \$ _____

Registration: \$150 x _____ (number of delegates) = \$ _____

Total Room Cost (at 4 people to a room) = + \$ _____

Summit Meals –

Membership Awards Luncheon: \$45 x _____ = + \$ _____

Travel: _____ miles at \$0.55 per mile = + \$ _____

Total cost (added from above) = \$ _____

Minus Region 4 Regular assistance* - \$ _____

Minus Local Summit Budget - \$ _____

Amount requested from Region 4: = \$ _____

*Region 4 regular assistance is based on the following formula: \$700 for the first voting delegate attending, plus \$180 for each additional voting delegate up to a maximum rebate of \$3,580 (17 voting delegates). This form is for requesting *additional* money beyond this regular assistance. **Regular assistance does not require a form.**

Required attachments checklist: _____ Local unit budget – Use attached budget worksheet
 _____ Current bank statement with checking and savings

Additional Region 4 ATPE Financial Assistance Request for Summit 2020

Important note: In order to receive the full amount of regular financial assistance as well as any additional money requested with this form, all registered voting delegates must sign in at both sessions of the House of Delegates as well as at the Region 4 Caucus. **Failure to do so will result in the appropriate prorating of these funds.**

This application for additional funds must be **postmarked on or before the 25th of May** and must include the required attachments (local budget and current bank statement). The Region 4 ATPE Executive Committee will review the application and make their decision. Allocation of financial assistance will be based on financial need and amount of funds available; it is for Region 4 ATPE Locals only.

Please send to: Sharon Dixon 5100 Allendale Rd. #505 Houston, TX 77017

For Region 4 Executive Committee Use Only

Date Received: ____ / ____ / 2020

Required Items Checklist:

_____ Does the local have a savings account?

_____ Did the local attach a budget? **

_____ Did the local attach the most recent bank statement? **

**** If either is not attached, then the application must be disqualified.**

_____ Application Approved

_____ Application Denied

\$ _____ Amount Awarded

_____ Check Number

Signature of First Region 4 ATPE Officer Approving: _____

Signature of Second Region 4 ATPE Officer Approving: _____

Page 2

ATPE Local Unit Budget Worksheet

Once you have finalized your local unit budget, keep track of spending using the Financial Reporting Workbook available in Leader Central.

Local Unit Name _____

Officer Name & Title _____

A. Current Financial Balances – Balances as of August 1. (Old money)

- 1. Checking accounts. \$ _____
- 2. Savings accounts. \$ _____
- 3. Credit union shares. \$ _____
- 4. Certificates of deposit. \$ _____
- 5. Other (Please identify). \$ _____
- (A) Total current financial balances** (old money). \$ _____

A

B. Anticipated Income (New money)

- 1. Local dues (Number of projected members x local dues per member). \$ _____
- 2. Estimated membership dues rebate from state office (3 percent of member dues for all categories of members). \$ _____
- 3. Fundraisers \$ _____
- 4. Interest income (e.g., amount earned on investment or savings). \$ _____
- 5. Assistance from the state office for summit travel and lodging \$ _____
- 6. Assistance from region (for summit and region convention, if available) \$ _____
- 7. Other \$ _____
- (B) Total anticipated income** (new money) \$ _____

B

(C) Total anticipated income. **(A + B)** \$ _____
 (old money + new money) = C

C

D. Anticipated Expenses

- 1. Summit registration, hotel & travel. \$ _____
- 2. Region convention registration & travel. \$ _____
- 3. New-teacher orientation/member recruitment (promo items, door prizes, table décor). \$ _____
- 4. Campus rep/officer recruitment and retention (campus rep meeting, gifts, promo items). \$ _____
- 5. Member communication (meetings, door prizes, newsletters, postage). \$ _____
- 6. Optional activities (Local unit publicity, political involvement, awards, donations, scholarships, school board relations). \$ _____
- 7. Other \$ _____
- (D) Total anticipated Expenses.** \$ _____

D

E. Anticipated Balance at End of Year (C - D). \$ _____
 (Total Anticipated Income – Total Anticipated Expenses) = E

E