Proposal: Sherwood Parent Society Funding Rubric

Step 1: Mandatory Gatekeeper Checks (Pass / Fail)

Before scoring a request, confirm it passes these basic rules. If it fails any check, decline or defer it immediately:

- **Rule Compliance:** Meets Alberta Education grant guidelines (if using the $500 ASCE grant), AGLC rules (if using casino funds), and school board policies.
- **Principal Approval:** The principal confirms the item or activity aligns with school operations, safety, and facility rules.
- **No Core Operational Replacement:** Does not pay for basic staffing, standard curriculum materials, or building maintenance covered by the school board.

Step 2: Evaluation Scoring Rubric (Max 20 Points)

Score each request from **1 to 4** across five criteria.

Criteria	4 Points (High)	3 Points (Moderate)	2 Points (Low)	1 Point (Minimal)
1. Student & Family Reach	Benefits all students/ families across the whole school	Benefits multiple grades or a large segment of families	Benefits a single grade or specific club/group	Benefits only a small handful of individuals
2. Alignment with Goals	Directly supports the School Development Plan or core parent engagement goals	Supports general wellness, community building, or enrichment	Loosely connected to school or council priorities	No clear link to school or council goals
3. Longevity & Value	Multi-year asset, reusable resource, or lasting community impact	Single-year program or major annual event	One-time consumable item or single short workshop	High cost for very brief or limited impact
4. Equity & Accessibility	Removes barriers; free and inclusive for all families regardless of income	Accessible to most students with minor accommodations	Requires extra fees, equipment, or travel from families	Excludes students who cannot pay or participate
5. Cost-Effectiveness	Strong value per student; includes quotes or co-funding/matching funds	Reasonable cost for the expected outcome	High cost relative to reach; no alternative quotes provided	Unjustified expense or duplicate of existing resources

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Step 3: Decision Thresholds

Use the total score (out of 20) to guide the council vote:

- **16 – 20 Points (Strong Approve):** High priority; fund in full if budget permits.
- **11 – 15 Points (Conditional / Partial Approve):** Worthwhile, but consider partial funding, requesting a second quote, or pairing with another funding bucket.
- **5 – 10 Points (Decline or Defer):** Low alignment or reach; decline or ask the applicant to revise the proposal.

Step 4: High-Cost & Equity Partial Funding Protocol

Trigger this step whenever a single request exceeds **10% of the annual budget ($_____+)** OR exceeds **$150 per participating student**.

1. Choose a Partial Funding Model

Instead of funding 100% of the sticker price, score the request on **Equity Impact** to determine which funding tier applies:

Funding Tier	Council Contribution Cap	How It Works (Best for Low-Income Equity)
Tier A: Universal Base + Needs Top-Up *(Recommended for Equity)*	**Up to 50% of total cost** + **100% hardship reserve**	Council covers a flat base subsidy for *every* student (lowering the fee for everyone) AND funds a confidential Principal's Hardship Pool to cover 100% of the remaining balance for low-income families.
Tier B: Fixed Per-Student Cap	**$100 – $150 max per student**	Council sets a hard annual ceiling per student for major off-site experiences. Families/school cover the difference, with confidential waivers available via the principal.
Tier C: Infrastructure / Fixed-Cost Only	**Up to 100% of fixed group costs**	Council pays only for non-student-specific overhead (e.g., charter buses, facility deposit, or equipment rentals), while per-person food/lodging is covered elsewhere.
Tier D: Matching Challenge	**1:1 Match up to a set cap**	Council matches funds raised through targeted grade-level fundraising, grants (e.g., EducationMatters / Parks Foundation), or school budget contributions.

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2. *Example Application: Grade 5 Outdoor School ($23,760 Total)*

- ***Total Cost:*** *$330 × 72 students =* ***$23,760*** *(30% of example ballpark $80,000 budget)*
- ***Rubric Reality Check:*** *High equity and milestone value, but single-grade reach (approx. 72 students) and high budget concentration.*

Recommended Council Motion (Using Tier A):

1. ***Universal Subsidy:*** *Council funds* ***$125 per student*** *($9,000 total) to bring the family fee down from $330 to $205.*
2. ***Equity Hardship Pool:*** *Council allocates an additional* ***$4,100*** *(covering 20 full remaining scholarships at $205 each) managed confidentially by the Principal so* ***zero students miss out due to cost****.*
3. ***Total Council Commitment: $13,100*** *(16% of annual budget instead of 30%), saving* ***$10,660*** *for school-wide initiatives while guaranteeing 100% student participation.*

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3. Guardrails for Large Requests ($8,000+)

- **Annual Budget Cap:** No single grade or event may consume more than **15%–20% ($12,000–$16,000)** of the annual budget unless it serves the entire school.
- **Confidentiality Rule:** Parent council/society members never see names of families accessing the hardship pool; the principal simply requests the dollar amount needed and returns unused scholarship funds to the general pool.
- **Co-Funding Requirement:** Requests over $10,000 must show at least one other funding attempt (e.g., school budget contribution, external grant, or student fundraising).