



Allocation Request Form

Quick Guide for School Staff

Mission: To develop resources and fund programs that inspire, promote, and support the academic achievement and cultural enrichment of all students.

Please submit approved Allocation Request Forms electronically (preferred) with any questions to:

WGHS Teacher and Principal Requests: WGHSrequests@willowglenfoundation.org

WGMS Principal Requests: WGMSrequests@willowglenfoundation.org

The Foundation is pleased to continue its support of education activities, student programs, staff training, and campus culture. Please reach out to us if you have any questions. The Foundation continues to focus on inspiring innovation, creative problem solving, collaboration, and compassion to support the long-term success of all students at Willow Glen Middle and High Schools.

Allocation Request Process

All Allocation Requests forms (AR) require pre-approval from your Principal, so please secure approval first. Electronic signatures are acceptable.

ARs under equal to or less than \$500 may be submitted to the Foundation's Allocations Committee anytime, and they are considered and approved on a rolling basis via email discussion by the Committee.

Requests in excess of \$500 should be submitted electronically (with principal approval) at least one week before the WGEF General Meeting. This enables the Allocations Committee time to contact you to receive additional information if needed, in order to make a full recommendation to the Foundation Board. ARs received later than one week before the board meeting will be held until the next board meeting.

Requests in excess of \$5,000 will be presented by the principal or requestor at a first Board meeting and approved at the next board meeting one month later. The presentation should include cost, benefits, supporting data such a quote and a demonstration, if applicable.

Please forward all approved ARs electronically to your Allocations Chair. Electronic submissions are the preferred method.

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Payment of approved ARs: The requestor may purchase item(s) directly or through the school, then submit receipts/invoices to your Allocations Chair. Alternatively, and the method preferred, is to request WGEF to purchase directly from the vendor. The Foundation is obligated to ensure that proper disbursements are in compliance with District Office Guidelines.

All Foundation General Meetings for 2024-2025 are held on the **FIRST WEDNESDAY** of each month. All school staff are welcome to attend. **To be considered at a meeting, Allocation Requests should be submitted by the last Wednesday of the previous month to allow for the Committee and Board Members to address any questions with the requestor(s).**