WELCOME AND THANK YOU FOR JOINING US!
FUNDRAISING: FROM BASICS TO BEYOND
What we are covering today?

✔ Basics
✔ Rules
✔ Types of Fundraisers
✔ Idea Sharing and Brainstorming
PTA’s **PRIMARY MISSION** does not include fundraising.

PTAs raise funds to fund programs and projects.
A fundraising project must:

1. Support the goals of the PTA
2. Be related to purposes of PTA as a tax-exempt organization
3. Be program driven
Guidelines

✔ Check the insurance guide for Green, Yellow or Red light activities.
✔ Approval by the Principal and Executive Board
✔ Approval by your Association
✔ Place it on your school calendar.

✔ Check PTA toolkit for forms and proper procedures
✔ Get all proper forms from those involved in the fundraiser
✔ Recruit Volunteers
✔ Thank people
RULES
Fundraising rules

- All fundraising must be approved by various groups
- Insurance
- Get votes recorded in the minutes!
- Expenses and Income
- 3 to 1 Rule from the IRS.
- Alcohol
- Sponsorship vs Endorsement
- Non Commercial
- Signing Contracts
- Raffles
- Money handling procedures
Insurance

Association Insurance Management (AIM)

E-mail: capta@aim-companies.com

Telephone: (800) 876-4044 or (214) 360-0801
Hold Harmless Agreements

PTA must obtain a Hold Harmless Agreement and Evidence of Insurance from each vendor, concessionaire, or service provider it uses.
THE 3 TO 1 RULE!
The IRS suggests that for every one fundraiser you hold, you have three Programs/Family Engagement type events for your families.
ALCOHOL AT PTA SPONSORED EVENTS
Serving Alcohol at Events

Alcohol is allowed at events, off campus, as long as PTA does not sell or actually serve the drinks. It must be done by those at the venue!
Alcohol in Auction Baskets

Allowed as long as you acquire a permit from the ABC (Alcohol Beverage Control)

Available at abc.ca.gov

Form # 221
SPONSORSHIPS VS ENDORSEMENTS & NONCOMMERCIAL POLICY
Sponsorship is okay,
Advertising is not
Recognizing support is okay,
Endorsement is not
“The name of the PTA or the names of PTA officers cannot be used in conjunctions with commercial activities, including the promotion of goods and services.”

Per CAPTA Tool Kit
CONTRACTS
Contracts

approved by the membership BEFORE being signed by two elected officers, one of which must be the president
How to sign a contract:

ABC PTA by Jane Doe, President 2020-2021
RAFFLES VS OPPORTUNITY DRAWINGS
Opportunity drawings versus raffles

Opportunity drawing
- every attendee has a chance
- no purchase necessary

Raffle
- participants BUY a chance to win
- yearly permit needed from AG (Form NRP-1)
-Report must be made with the AG’s office (Form NRP-2)
Guidelines for handling money

✔ Make a game plan with the treasurer
✔ Two people always count money
  ✔ They cannot be related by blood, marriage or live in the same household
✔ Count in a safe and secure place
✔ Fill out proper paperwork or next best thing
✔ Secure money once counting is competed
TYPES OF FUNDRAISERS
Basic types of fundraisers:

- Asking for donations/direct solicitation
- Providing an experience/ events
- Selling a product
- Indirect fundraisers
- Grants and Scholarships
Asking for donations

• Direct Donations from parents
• Donations from corporations
• Coin drives
Providing an experience/event

usually more work … however

• more fun and can build community

• if you are lucky, it becomes a tradition
Selling a product

Things to consider:
  reputable company?
  ratio of receipts to profit?
how many volunteers hours needed?
is product offered by others in area?
  is item in line with PTA’s values?
vendor packed individual orders
Indirect fundraisers

- recycling programs
- Box Tops for Education
- shopping programs
- offers from local merchants
- restaurant nights
Grant Writing

• Have a plan
• Research the grant
• How will you accomplish your goal
• Searching for Grants:
  keywords: Public school, Grant, California, city, county, subject matter
IDEA SHARING
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31st District Fundraising Chairs

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California State PTA (2018)
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