



California State
PTA[®]
everychild.one voice.

**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

BASICS





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)

MONEY HANDLING

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 completed

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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