

## Key Role – Fundraising Chairman

- Works with a committee, appointed by the president, to plan and organize fundraising activities
- Focuses on raising the amount of funds needed to meet the unit's budget
- Presents reports on proposed fundraising activities at board and association meetings for approval

## Getting Started

**Preparation** – Review files and materials from last term to better understand the scope of your new position. Learn more about:

- PTA financial policies, procedures and best practices
- *Insurance and Loss Prevention Guide*

It's also worthwhile to talk to last term's chairman to get advice and tips about your new role.

**Schedule Meeting** – Soon after election, meet with the fundraising committee to create a plan for the upcoming year. Assess what worked best in the past and what might be changed or introduced as a fundraiser.

Delegate tasks to committee members such as publicity, donations and volunteer recruitment for fundraising events.

## How Tos

Units engage in a wide variety of fundraising efforts to finance PTA programs and activities to:

- Promote family engagement in school to support student success
- Meet the interests, needs and resources of the school community

Many PTAs fund academic enrichment programs such as field trips or after-school art, drama, music, math and reading programs. Other PTAs support health programs, safety and physical education.

**Fundraising Options** – There is a broad range of options for PTA fundraisers. They include organizing product sales, providing services, promoting 'Give Back' programs, soliciting pledges and applying for grants.

When you create a fundraising plan, consider what format might work best: an in-person activity or a virtual fundraiser. Think about the duration of a fundraiser and if an ongoing activity or short-term event is a good fit.

Keep in mind that PTAs should use the 3-to-1 Rule. For every fundraiser, PTAs organize three, non-fundraising activities to grow family engagement and home-school partnerships.

In selecting a fundraiser, the committee should also ensure that it:

- Creates goodwill for PTA
- Does not exploit students or involve door-to-door sales by students
- Involves no commercial or advertising obligations by the PTA as a nonprofit 501(c)(3) organization

Before identifying the best date/time for your fundraiser, look at PTA and school calendars to see what holidays and other activities are already scheduled.

**Examples** – Book Fair | Recycling | Holiday Boutique | Auction | Community Garage Sale | Spirit Wear Sale | Arts and Crafts Fair | Carnival | Valentine Grams | Plant and Flower Sale | Walk-A-Thon | Game Snack Bar

## PTA Policies and Fundraisers

The *California State PTA Toolkit* provides guidelines, best practices and tips for fundraising. When choosing a fundraiser, ensure that it complies with:

- PTA goals, policies and purposes as a 501(c)(3) nonprofit organization
- School district policies on facilities' use, equipment, safety, food services and nutrition
- State and local laws regulating charitable solicitations or sales and games of chance
- Requirements in the *Insurance Loss and Prevention Guide* on approved PTA activities

**Noncommercial Policy** – Fundraising efforts must support the goals of PTA and be related to the educational, charitable and philanthropic purposes as a tax-exempt, nonprofit organization.

This means that a PTA cannot promote or endorse products, services or businesses. And, the names of PTA officers cannot be used for commercial purposes.

When selling a commercial product, please include the following disclaimer in all publicity:

*"This is a PTA fundraiser. Distribution of this information does not imply endorsement by PTA."*

**Contracts** – Contracts with a vendor are always signed by two board members: the president and another

elected officer. Before signing a contract on behalf of your PTA:

- Get your association's approval and check that it is recorded in meeting minutes
- Verify that vendors are fully covered by their own liability insurance and Workers' Compensation and obtain a copy of their certificate of insurance
- Have vendors sign a Hold Harmless Agreement

With any contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and not the president as an individual. The signature on a written contract should read, "ABC PTA by Jane Smith, President and (name), officer."

In addition, as a PTA officer, never sign a Hold Harmless Agreement on behalf of your PTA. Signing such a contract naming the PTA responsible for all injury and damages may increase PTA's liability and the amount PTA might have to pay, if a claim occurs.

If you have questions about a contract, contact the PTA insurance broker to review it prior to signing.

#### **Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book and files to pass on to a successor
- Work together as a team to improve the lives of all children and their families

#### **Other Useful Information**

##### **California State PTA – [www.capta.org](http://www.capta.org)**

- PTA Leaders tab and more
- *California State PTA Toolkit*, Finance section
- *Insurance and Loss Prevention Guide* – Mailed annually to PTA presidents

##### **National PTA – [www.pta.org](http://www.pta.org)**

- PTA Leaders tab and more
- Back-to-School Kit

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