



# FUNDRAISING

The primary emphasis in PTA must be on promoting the PTA mission, vision, and purposes, not fundraising. It's all in how fundraising is done that is important. Mission-driven fundraising is key! Fundraising events must reflect the high principles of the PTA, be educational, social, or have recreational value.

## TOP 10 THINGS TO KNOW FOR THIS POSITION

1. Ensure a fundraiser adheres to the PTA vision, mission, and purposes and conforms to the noncommercial, nonsectarian, and nonpartisan policies outlined in the PTA bylaws.
2. Use the three programs to one fundraiser guideline when planning.
3. Fundraisers can be about more than making money for the PTA. They can also be a part of a program that supports students or parents.
4. Determine if you need to collect sales tax or if tax-free days can be used.
5. If working with a fundraising company, verify the company is highly rated and has been in business for a reasonable amount of time. Ensure they are knowledgeable about fundraising and sales tax issues.
6. Check the contract to determine who is responsible for damages or unclaimed goods. Ensure the executive board approves and the president signs the contract.
7. Comply with local, state, and federal laws and school district rules (if hosting on school property) regarding fundraisers.
8. Determine if your insurance covers losses or accidents that could occur during a fundraiser.
9. Use caution when considering a PTA member's business for a fundraiser. Obtain two additional bids for consideration in addition to the members' bid. See the Confidentiality, Ethics, and Conflict of Interest Agreement.
10. Report all income, expenses, and profit from the fundraising event to the executive board and the members at the meeting immediately following the activity.

## KEY TRAINING

- FOUNDATIONS: Essentials**  
An introductory course for new PTA leaders required once in their PTA service.
- Basics Boardmanship**  
Required online course for all executive board members.
- Basics Fundraising**  
Required online course for fundraising chairs.

### Key Resources

- Basics Boardmanship and Fundraising Resource Guide**  
Written resource guides provide more in-depth answers to questions you may have about serving as the fundraising chair

### Additional Resources

- Basics Treasurer Online Training**
- Basics Treasurer Resource Guide**

## IMPORTANT DATES AND DEADLINES

- **After Election:** Meet with the outgoing chair to learn what has worked well in the past. Meet with the new executive board to understand the needs of the PTA for the next school year.
- **June/July:** Coordinate and work with a committee to research and determine fundraisers for the PTA.
- **August:** Join your PTA. Develop a plan of work and submit it to the executive board for approval. Schedule membership-approved fundraisers with the principal and the campus.
- **Throughout the Year:** Conduct fundraisers. Update the executive board and membership after each fundraiser is held. If new fundraisers are added, obtain membership approval before beginning.
- **April/May:** Ensure next year's budget reflects any fundraisers that must be planned over the summer.

## KEEPING RECORDS AND PREPARING FOR SUCCESSION

Keep copies of fundraiser reports, receipts/invoices, contracts, committee feedback, etc., for your successor.

Questions? For more resources, visit [txpta.org/fundraising](https://txpta.org/fundraising); email [treasurer@txpta.org](mailto:treasurer@txpta.org); or contact your Council PTA, Field Service Representative, or the Texas PTA Office at 1-800-TALK-PTA.

# Quick Start Guide

*The Basics materials provide essential training for many PTA positions. This guide is just the beginning!*

## ABOUT PTA

The mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

*What this means: We engage, empower, and advocate to achieve our vision—every child's potential is a reality. Our mission statement guides us and should drive any significant decision. The funds we raise are used to support our mission.*

## WHAT IS PTA?

PTA is a 501c3, member-based association that advocates for the best interest of ALL children in many areas. It is self-governing and non-partisan. PTA advocates for or against issues but does not endorse any candidate or political party.

*What this means: You are a member of a nonprofit executive board and therefore have certain legal responsibilities. Executive board members have three fundamental fiduciary duties: the duty of care, duty of loyalty, and duty of obedience. Executive board members act as trustees of the PTA's assets and must exercise due diligence to oversee that the PTA is well-managed and that its financial situation remains sound. The executive board verifies that all filing requirements and tax obligations are completed.*

## OUR PURPOSE

- Welcoming families into the school community
- Communicating effectively
- Supporting student success
- Speaking up for every child
- Sharing power
- Collaborating with communities

## PTA STRUCTURE

Members  
 Local PTA (campus level)  
 Council PTA (district or community)  
 Texas PTA  
 National PTA

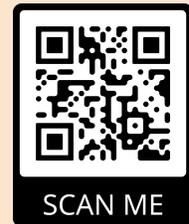
## FINANCE

### The Life Cycle of A Budget

- Elected/appointed executive board members create plans of work which include a budget detailing project-related expenses.
- PTA happens, and expenses occur.
- The executive board approves the plans of work, and the membership votes to adopt the budget plan. Financial reports are presented at each regular executive board and membership meeting. Financial reconciliation happens at the end of the year, and the membership receives the report at the first meeting of the next school year.

## TRAINING

Scan the code or visit [txpta.org/pta-training](https://txpta.org/pta-training) to learn more.



## GETTING STARTED

As a leader in PTA, there are a few things you need to do to start the year.

ONE	TWO	THREE	FOUR
First, join your local PTA! All executive board members must be PTA members.	Next, register with Texas PTA at <a href="https://txpta.org/register-as-a-board-member">txpta.org/register-as-a-board-member</a> .	Your local PTA secretary asks all executive board members to sign a Confidentiality, Ethics, and Conflict of Interest Agreement.	Your local PTA president asks all executive board members to create a plan of work, which begins the annual budget process.