



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 association, be educational, social, or have recreational value.

TOP 10 THINGS TO KNOW FOR THIS POSITION

1. Use the 3 programs to 1 fundraiser guideline when planning.
2. 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.
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 reviewed 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 regarding fundraisers.
8. Determine if your insurance covers what may come up during a fundraiser.
9. Use caution when considering a PTA member's business for a fundraiser. Obtain 2 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 association at the meeting immediately following the activity.

KEY TRAININGS

- BASICS Boardmanship Resource Guide & Webinar**
- BASICS Fundraising Webinar**
- BASICS Fundraising Resource Guide**

Possible additional tools:

- BASICS Treasurer Resource Guide & Webinar**

IMPORTANT DATES AND DEADLINES

- **June/July:** Coordinate and work with a committee to research and determine fundraisers for the PTA. Attend the Texas PTA LAUNCH convention. Schedule any fundraisers, with membership approval, with the principal and the campus.
- **August:** Join your Local PTA. Develop a Plan of Work and submit it to the Executive Board for approval.
- **Throughout the Year:** Conduct fundraisers. Update Plan of Work with any new fundraiser.
- **April/May:** Ensure next year's budget reflects any fundraisers that must be planned over the summer.
- **May/June:** Meet with PTA President, Principal, and/or Counselor to determine fundraising wants and needs for the next school year.

KEEPING RECORDS AND PREPARING FOR SUCCESSION

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

Questions? Find more resources at txpta.org/fundraising. Contact your Council PTA or Field Service Representative. In addition, you can email treasurer@txpta.org or contact the Texas PTA State 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

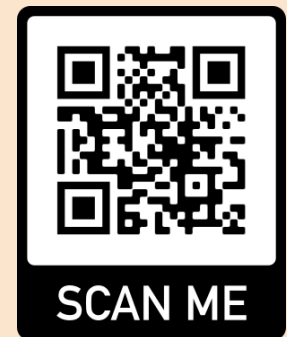
FINANCE

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/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 txpta.org/register-as-a-board-member .	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.

