



# Fundraising

2022- 2023



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# Importance of the Fundraising Position

It seems obvious why fundraising is important: to raise funds for needed items, services, and programs. Yet, raising funds has many other benefits beyond simply the obvious. Every movement needs momentum or fuel, and the successful fulfillment of the PTA mission often relies on the monies raised each year. So yes, fundraising can make a huge impact.

Fundraising by nonprofits should be creative. Creativity in fundraising efforts will ensure that PTAs have the financial resources they need to operate and provide the services they are committed to providing. In the normal process of selecting fundraising platforms, consider selecting several different types. Your options are vast, so don't limit yourself to these examples; however, PTAs across the country often use these - all kinds of "a-thons," silent auctions, painless fundraisers such as grocery store loyalty programs, restaurant spirit nights, catalog sales, and check-writing campaigns. In addition, financial resources can be found through grants offered by National and Texas PTA and community sponsorship programs. No matter where you get started, consider how you can go beyond the traditional way of asking for financial support.

Without a doubt, PTAs should always ask the following when they begin planning fundraisers:

- What is our mission?
- Why do we exist?
- Why do we need financial support?

Some PTAs call this position Ways and Means or Stewardship to point out that this role responsibly raises money as a means to an end.

# About PTA

**VISION** Every child's potential is a reality.

**MISSION** To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

## PURPOSES

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

## VALUES

- **Collaboration:** We will partner with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward achieving our association's strategic initiatives.

## PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- Standard 1: **Welcoming All Families into the School Community** Families are active participants in the life of the school and feel welcomed, valued, and connected to school staff and to what students are learning and doing in class.
- Standard 2: **Communicating Effectively** Families and school staff engage in regular, two-way, meaningful communication about student learning.
- Standard 3: **Supporting Student Success** Families and school staff continuously collaborate to support students' learning and healthy development both at home and school and have regular opportunities to strengthen their knowledge and skills effectively.
- Standard 4: **Speaking Up for Every Child** Families are empowered to advocate for their own and other children to ensure that students are treated fairly and have access to learning opportunities to support their success.
- Standard 5: **Sharing Power** Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborating with Community** Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



# Leadership Competencies

## Skills and Abilities Effective Leaders Demonstrate

Successful leaders are effective leaders. Think of some of the most effective PTA leaders you have worked with. They fill their PTA role well, but their leadership capacity goes beyond that. They have skills and abilities that allow them to step into various roles. They see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to improve continually.

Texas PTA has identified a set of competencies effective leaders demonstrate. Current and potential leaders can use these skills and abilities to help them improve their leadership and by Local or Council PTA nominating committees to recruit, nominate, and elect effective leaders. These competencies also drive our Full Circle Leadership Development program.

This list is by no means exhaustive. Rather, it is representative of the qualities PTA leaders demonstrate in the work they do to make every child's potential a reality.

Competencies	Descriptions
Self-Awareness	An individual's ability to assess their own strengths and weaknesses
Vision	Demonstrates a clear understanding of the future and how to get there
Relationship Building	Develops trust, mutual respect, and values diversity
Critical Thinking	Obtains all the relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions
Time & Resource Management	Effectively prioritizes and manages resources to accomplish goals of group or project
Motivation	Demonstrates and promotes interest and enthusiasm
Empathy	Expresses verbal and nonverbal recognition of feelings, needs, and concerns of others
Creativity	Sees and thinks of new ideas, alternatives, and ways to do things
Communication	Listens actively and conveys information clearly, concisely and accurately in both writing and speech
Collaboration	Works as a team to achieve a common purpose Puts service before self
Delegation	Shares responsibilities including guidance and follow up
Continuous Learning	Pursues development of skills and knowledge
Integrity	Doing the right thing when no one is watching
Initiative	Steps up unprompted or going above and beyond with excellence

# Diversity, Equity, & Inclusion Policy



This Policy has been developed by the Texas PTA Diversity, Equity and Inclusion Task Force, adopted by the Texas PTA Board of Directors (“Board”), and is intended to be consistent with the National PTA’s Diversity, Equity and Inclusion Policy. This Policy is also intended to further the commitment of Texas PTA to diversity, equity, and inclusion, which is: To continually be a voice for all children by reflecting diversity and being inclusive in our membership, leadership, program content, advocacy, training, partnerships, and communications.

We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

**Effective Date:** This policy was adopted as of April 19, 2021, shall be reviewed by the Board every two years, and shall remain in effect until amended or replaced in its entirety as a result of action by the Board.

**Scope:** This policy shall apply as guidance to Texas PTA, all constituent divisions (Local PTAs and other divisions, including Council PTAs), and their respective members.

**Definitions:** For the purpose of this policy:

- *Diversity* is the representation of, and respect for, people from different backgrounds and identities—including but not limited to race, culture, religion, socio-economic status, age, geographic area, sexual orientation, and gender identification, language, approaches to learning, diagnoses, or exceptionalities impacting learning or access to learning, and physical appearance. It also involves bringing different ideas, perspectives, lived experiences, talents, values, and worldviews to the table to represent the broad variety of children, caregivers, educators, and communities within the PTA family.
- *Equity* provides fairness and access to resources, opportunities, and outcomes so that all communities get what they need to be engaged and successful. This moves beyond an “equal across the board” approach to
  - a) Recognizing and addressing bias and privilege.
  - b) Understand and attend to specific individual and community needs, providing additional resources to those with greater needs.
- *Inclusion* is actions, behaviors, and social norms that strive to ensure all people feel they are safe, welcomed, and that they belong. This means putting diversity into action with skill and intentionality, striving to ensure everyone feels respected, supported, and valued—and can fully participate with equal voice and right to be heard. This includes actively seeking out voices that have been traditionally underrepresented and/or marginalized.

**Policy:** Texas PTA and its constituent divisions (Local PTAs and other divisions including Council PTAs) shall:

- Promote awareness, inclusion, and engagement of all diverse populations represented in the community and encourage all;
- Openly assess beliefs and practices to ensure inclusiveness, equity, and to guard against discrimination;
- Strive to ensure that the membership, leadership, programs, partnerships, and printed materials across Texas reflect the diversity of their communities;
- Communicate with families in their communities in languages which they understand, to the extent possible;
- Identify and address barriers that hinder inclusivity;
- Foster programs and practices that eliminate bias, prejudice, and misunderstanding;
- Advocate for funding, laws, and regulations that support programs, policies, and services that meet the health, safety, and educational needs of all student populations in Texas public schools; and
- Provide resources and training that develop a more diverse and inclusive group of Texas PTA members, leaders, and community.

*Texas PTA first adopted a Cultural Diversity and Inclusion policy on July 26, 2012*

# Getting Started

It can't be said enough - the primary emphasis in PTA must be focused on promoting the PTA mission, vision, and purposes, not on fundraising. It's all in how fundraising is done that is important. Mission-driven fundraising is key!

Every PTA should begin the year with specific goals aligned with the school's and principal's goals before deciding the funds needed to accomplish these tasks and which fundraisers will work best.

Fundraising events must reflect the high principles of the association, be educational, social, or have recreational value. Be careful to avoid parent burnout. Too many fundraisers may drive away members. With fundraising, less can be more.

Fundraisers are never conducted to raise money for which no use has been planned. The most successful fundraisers are those where the PTA members and the school community understand why the funds are being raised. Consider including a list of programs and other projects the PTA has planned for the year, but don't limit the funds raised to only a specific program or project to avoid issues if not enough or if too many are raised.

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. Some examples include walk-a-thons (a healthy lifestyle program that raises money for the PTA) and a fall carnival (a community event that generally also includes a fundraising component through ticket sales). Check with other groups on campus or other PTAs in your area to see what fundraisers they are doing to not compete with one another. Products and timing need to be considered.

## Primary Duties of a Fundraising Chair

- Complete all required PTA training and appropriate fundraising training.
- Consider completing all treasurer training as well.
- Establish a Plan of Work.
- Work with the treasurer to ensure the PTA has purchased appropriate insurance.
- Coordinate and work with a committee.
- Research and determine fundraisers for the PTA.
- Comply with local, state, and federal laws and school district rules regarding fundraisers.
- Verify that the executive board has approved and the president has signed any contract or agreement for fundraisers.
- If a fundraiser is initially approved as a general fundraiser budget line, ensure membership approves the actual fundraiser before commitment. This can be done through a budget amendment clarifying the fundraiser description or a separate vote.
- Work with the executive board to declare tax-free days and communicate sales tax information clearly to the treasurer when making deposits.
- Ensure that all money is counted by at least two people and verified, utilizing a Deposit Form. Submit to the treasurer as soon as possible.
- Ensure all fundraising-related bills are paid by completing a Funds Request Form and submitting the associated receipts or invoices to the treasurer.
- Report all income, expenses, and profit from the fundraising event to the executive board and the association immediately following the activity at the meeting.





# Plan of Work

**Officer/Chairman**

**Name:** \_\_\_\_\_

**Position:**

Fundraising \_\_\_\_\_

**Year:** \_\_\_\_\_

**Reproduce as needed for the appropriate number of goals.**

Responsibilities/ Duties:	Research and present fundraisers for approval. Oversee fundraisers.	Committee Members:	Members are selected by the chair with approval from the executive board.
Goal:	To hold successful fundraisers to provide funds for the PTA's planned activities.	Evaluation Process:	Profitability and value of fundraisers.

Specific Action Steps	Start Date	Completion Date	Budget
Research fundraisers to assist in deciding on the best fundraisers for the PTA.	July	Ongoing	\$0
Present fundraisers to the executive board and membership for approval. If initially approved as a general fundraiser budget line, ensure membership approves actual fundraiser before commitment.	Ongoing		Varies. Ensure both expected income and expenses are included in the budget.
Oversee fundraisers; ensure all deposits are made, expenses paid, insurance obtained, and merchandise distributed (if applicable).	Ongoing		\$0
Present results of fundraisers to executive board and membership.	Ongoing		\$0
Monitor committees' expenditures and provide committee chairs with updates on budget status.	Ongoing		\$0

<b>Resources:</b>	Fundraising Resource Guide, Treasurer Resource Guide, Texas PTA Field Service Representative, Council PTA (if applicable), National PTA, and Texas PTA website.
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# Fundraising Fundamentals

## Why Funds Are Needed

PTA funds are used to promote PTA purposes. Money must be raised ethically, recorded accurately, and spent wisely. The following are some functions for which funds should be budgeted.

- Leadership training
- Insurance
- PTA administration
- Advocacy, programs, and parent education
- Expenditures of all committee chairs
- Awards
- Other activities your PTA membership approves.

## Questions To Ask

When setting fundraising goals, consider the following:

- Did you carry over more money than usual from the prior year?
- Have your PTA program plans changed?
- Revisit your mission and purpose.
- How much do you need to fundraise?
- Be sure to loop in your membership to amend the budget if fundraising plans change.

When planning a fundraiser, ask the following questions:

- Does it adhere to the PTA vision, mission, and purposes?
- Does it conform to the noncommercial, nonsectarian, and nonpartisan policies outlined in the PTA bylaws?
- Will it create goodwill for the PTA?
- Will it provide the revenue to help meet the PTA's goals?
- Do you need to collect sales tax, or can tax-free days be used?
- Do the contracts for the products cover who is responsible for damages or unclaimed goods?
- Does your insurance cover what may come up during the fundraiser?
- Is the PTA using volunteers, or does it have to pay or contract workers?
- Is it ethical?
- Is there a cost for using a facility? Are there special restrictions for the facility?
- How long is the event going to last?
- Are there local, state, or federal laws that apply?
- Is the company a recognized fundraising company? How long have they been in business? Ask for and check references.
- Does the company have a local sales representative?
- Is the fundraising company knowledgeable about fundraising and sales tax issues?
- Have complaints been filed with the Better Business Bureau or Texas PTA for a company you are considering??

## 3-to-1 Guideline

It is recommended that PTAs use the three programs to one fundraiser guideline when planning the year's activities. For every fundraising activity, Texas PTA recommends three programs or service projects.

## Relationship of Members/Students to Fundraisers

When planning fundraisers, there are a few important guidelines regarding member and student participation:

- The executive board shall use caution when considering a PTA member's business for a fundraiser. At a minimum, Texas PTA recommends the PTA receive two additional bids for consideration in addition to the members' bid. For more information, see the Confidentiality, Ethics, and Conflict of Interest Agreement;
- PTA executive boards select and approve fundraisers to preclude any potential "conflict of interest;"
- Children must never be placed in a position of risk to further any fundraising project;
- The primary emphasis of PTA focuses upon the promotion of the Purposes, not upon fundraising;
- PTAs should refrain from organizing and participating in any fundraising activity that may require a child to go door-to-door without adult supervision; and

- Award programs, if at all possible, thank and award all families for their help and participation, not just a few “top sellers.”

## Planning

- **Create a calendar of activities.** The time-tested way to figure out what needs to be done by when is to work backward from the day of the fundraiser. List all of the steps. Create an actual calendar once you have worked out what needs to be done. Make sure to list the date the task will begin and the date the task will end.
- **Define committees and assign leaders.** Remember, one person is not a committee. Invite people to join your committee. Sub-committees might be formed to plan, handle meals or refreshments, decorations, awards, and gather auction items or donations. Schedule regular committee meetings, allowing everyone to report their progress and any difficulties they may be facing.
- **Plan the promotion and publicity.** Promotions are advertising you arrange or pay for yourself, such as posters and invitations. Publicity is media reporting. Promoting your fundraiser tells your members and supporters about it. Your newsletter, morning announcements, and website should generate excitement about the fundraising months in advance, mentioning the date, location, and contact person for more information or volunteer opportunities. Consider placing announcements in the local newspaper, the school website, and on social media (ex: Facebook, Twitter, Instagram, Pinterest, etc.).

## Legal Implications

There are three main legal implications for fundraising activities:

- **Product liability** – PTAs should always be concerned when a fundraiser involves selling a product. These concerns vary depending on the product.
- **Personal injury claims** – Personal injury claims are the second most common legal concern. Remember, anyone can become injured during a fundraiser, and they could hold the PTA responsible.
- **Contract issues** – PTAs should secure contracts when a third party is involved with its fundraisers. Like any legal document, these agreements are binding on the PTA and could result in legal liability if those agreements are not fulfilled. For example, if a PTA signs a contract that states a minimum amount of items must be purchased to receive a percentage of the sales, the PTA may be required to purchase those items with PTA funds if the minimum amount is not sold. Any contract entered into by a PTA should be examined thoroughly by a person knowledgeable in contract law who can advise the PTA concerning its obligations. Contracts require executive board approval and are signed by the president.

PTAs should always purchase insurance to cover any liability the PTA may encounter. The PTA should review its insurance policy to determine whether product liability, personal injury, or contract claims arising from fundraising events would be covered. While the personal injury is typically covered in a general liability insurance policy, product liability claims and claims arising from contractual obligations may not be covered.

# Fundraising Ideas

## Donations

- Corporate sponsorships Parent/PTA member donation drive (often called No Hassle Fundraiser, greenbacks)
- Mile/pounds of pennies, pennies for...

## Food Sales (Check School District Policies)

- After-school snacks: pickles, cupcakes, sno-cones
- Bake sales; bake sale on election day (if school is polling site)
- Breakfast tacos
- Candy bars
- Community dinners: spaghetti, Mexican, Barbeque
- Concession stands at school/PTA events like movie nights, dances or sports events
- Take home dinners

## Non-Food Sales

- Book Fair/Used Book Fair
- Brochure sales: candy, gift-wrap, cookie tins
- Family portraits
- Greeting cards and stationery
- Holiday-grams: flowers, candy, notes
- Magazine subscriptions
- Personalize items with students' names
- Plants, poinsettias, seeds, flowers, mulch
- Santa's workshops
- School supplies/school store
- School spirit items: shoestrings in school colors, stadium cushions, t-shirts, water bottles,

## Carnivals

- Craft Fair
- Fall Festival/Carnival
- Field Day Fun
- Fun Day
- Halloween Carnival
- Kids Around the World
- Spring Carnival

## Project/Event/Program Fundraisers

- Art/game night
- Auctions: live, silent, online
- Bingo (refer to the Bingo section)
- Grants
- Raffles (refer to the Raffles section)
- Recycling: printer cartridges, cans, paper, clothing
- Rebate programs: BoxTops4Education, Labels for Education
- Retail or restaurant night (where PTA receives a percent of proceeds)
- Store reward programs

## Healthy Food Fundraisers

- Fruit
- Healthy cookbooks
- Healthy vending machines
- Herb garden kits
- Nuts and trail mix
- Smoothies
- Spices

## Active Fundraisers

- Bike-a-thon, bowl-a-thon, skate-a-thon, walk-a-thon
- Family obstacle course
- Fun walks or runs
- Golf or tennis tournaments
- School dances
- Teacher-student competition

## Product Sales

Many PTAs choose to sell products to help raise funds for their PTA. Remember that students should never be asked to sell to strangers. Your PTA may decide to purchase and sell a product directly or may choose to hire a third-party fundraising company. Examples of direct product selling would include spirit wear sales or concession sales. Catalog sales and book fairs are two common sales in which a fundraising company is involved. Many items that PTAs sell are taxable to the purchaser. To ensure your PTA is collecting sales tax correctly, please see the Treasurer's Resource Guide and consult with your PTA's treasurer.

Suppose your PTA chooses to use a third-party fundraising company. The following should be considered when selecting a fundraising company:

- **Reputation** - Look for a company with an established reputation working with schools and parent organizations. Talk with other schools in the area to find out any information regarding the company being considered. Check if complaints are filed with the Better Business Bureau or on social media sites.
- **References** – Ask the fundraising company for references. The fundraising company should not have a problem supplying a list of references.
- **Profit Margin** – Profitability is another important consideration when choosing a fundraising company. Each company determines the profit margin it will offer to the PTA; these margins can vary greatly from company to company. Look for companies that offer a high percentage. Remember that fees for handling charges, shipping, and other expenses can take away from profits. Make sure to factor in these expenses when making your considerations.
- **Customer Service** – Good fundraising companies give support throughout the entire process of the fundraiser. Pay close attention to the level of customer service that is received. How easy is it to get in touch with someone when help is needed? Is the company representative helpful? You want someone who will provide fast and reliable answers to questions. Most fundraising companies assign specific sales agents. This agent will provide customer service throughout the entire fundraiser. Make sure that this is a service that your fundraising company offers.
- **Knowledge** - Is the fundraising company knowledgeable about fundraising and sales tax issues?
- **Licensing** – Make sure that the company is a licensed business in the area it claims to be located. Look for an affiliation with the Association of Fund-Raising Distributors and Suppliers (AFRDS)
- **Products** – Look for providers that offer many different types of fundraisers, then work with the same company each time you plan a fundraiser. Make sure the products offered are of high quality and available at a price that most of your parents, teachers, and community would be likely to buy.

## Contracts

More and more fundraising companies are asking for written contracts. A contract protects you, the association, and the fundraising company by having all major decisions in writing. With a contractual agreement, all parties assume responsibility for complying with the terms, but the PTA also begins the fundraising project with a clear understanding of who handles what. Here are some things to look for when reviewing a fundraising contract:

- Double-check all the numbers. Are the costs, percentages, etc., the same as those you agreed on?
- Are all of the desired services included? (For example, kick-off presentations, incentive programs, tallying, packing, and shipping.) Is it clear that the company covers the cost of these services?
- Are the approved promotional materials listed? (Take-home brochures, display kits, sample packs, etc.)
- Are payment and product delivery dates included and consistent with your verbal agreement? If any payment is required before the delivery of all merchandise, be sure you have thoroughly checked out the financial status and ethics of the company. Check references with at least two other organizations that have done business with the vendor.
- Is there a clause covering the procedure for handling damaged, unsold, or returned merchandise?
- Ensure the contract is an agreement between two organizations, not two individuals. As the fundraising VP/chair, you should not sign any contracts. You should provide them to the executive board for approval. After that approval, the president will sign. Executive Board approval is reflected in the executive board meeting minutes. When signing contracts, the signer adds their title after their name to show they are signing for the PTA and not as individuals.
- Signers on the written contract should appear as follows:

Jane Doe Fundraising  
(Fundraising Company Name)

By: \_\_\_\_\_

(Company's Representative)

ABC Elementary School PTA

(PTA Name)

By: \_\_\_\_\_

(PTA President)

- A variety of insurance policies are available to vendors to protect themselves and your PTA against injuries and accidents resulting from use of their products. Other policies also provide proof of coverage for claims under the Deceptive Trade Practices Act. If you have concerns, consider requesting proof of coverage from your selected vendor before doing business.

### Rewards and Rebates

Another popular fundraiser involves rewards and rebates from national and local businesses. These types of fundraisers usually require little time and investment from the participants. Examples are Amazon Smile, the Benefit app, BoxTops4Education, and the Safeway/Randalls grocery stores. Check out company websites for more information. Ensure that the company allows PTAs, rather than schools, to participate.

### Community Building/Fun Fundraisers

As fundraisers ideally serve more than one purpose, consider fundraisers that build your community and help your students and families have fun together. Here are some ideas:

- **Art Class:** Find a talented artist (painter, sculptor, crafter) from your community willing to volunteer their time to teach. Promote your class online and encourage community members to register and pay a fee. Make sure each participant has the tools and supplies.
- **Car Decals:** Can be customized for graduates, school spirit, PTSA membership recognition & more. Promotes class and school spirit all year!
- **Carnival/Fair:** Great way to promote community. Remember, any contracts with your carnival should be signed only by the President. Review what your insurance policy covers regarding this type of event.
- **Cooking Class:** Find a talented chef from your community willing to volunteer their teaching time. Promote your class online and encourage community members to register and pay a fee. Ensure each participant has the required ingredients (either by sending out a grocery list or providing pre-made kits).
- **Dance-a-Thon:** Promotes wellness while raising funds. This can be simple. Advertise, get registrations, provide t-shirts, and have a "famous" DJ (mascot, principal, custodian) play music/dance at a common time. Can partner with a vendor to market and collect pledges and money.
- **Flocking:** Purchase 10 pink (or school color) plastic flamingos. Pick 10 yards in your community to be the lucky 1st recipients. For \$10, the flamingos are removed; for \$15 moved to the lawn of choice. It could also do throughout the year to recognize birthdays. Could offer HS students service hours to help move around.
- **Food Truck Event:** Could be spread out in a school parking lot or neighborhood park. Consider accepting pre-orders. It could run in conjunction with a membership drive. Food trucks give a portion of the profit to PTA for hosting.
- **Read-a-Thon:** Event, usually with a time limit, where students set a goal they would like to reach (4 books, 1500 pages). Can collect pledges based on a student meeting the goal. Can partner with a vendor.
- **Restaurant Night:** Partner with restaurants in your community. A small portion of proceeds goes to PTA, and the percentage of proceeds varies by restaurant. Invite HS mascot, cheer, etc., to wave to families in the pickup line.
- **Run/Walk-a-Thon:** Promotes wellness while raising funds. It can be simple. Advertise, get registrations, provide t-shirts and walk/run at a common time. Can partner with a vendor to market and collect pledges and money.
- **Snow Cone Event:** Snowcone companies offer percentages of proceeds from events. Invite a snow cone truck to the neighborhood park, culdesac, etc. Some franchises offer home delivery with pre-orders.
- **Spirit Wear/T-Shirt Sale:** Sold through a website or paper forms. You can typically double your money. Consider doing pre-orders only to limit excess inventory.
- **Sponsor-a-Day Donation:** Allow families to sponsor a day on the school calendar. May pick a birthday or other significant date. Highlight family on social media, announcements, marquee, etc.

- **Yard Signs:** Can be customized for graduates, school spirit, PTSA membership recognition & more. Promotes class and school spirit all year!

## **Auctions**

Many PTAs run successful auctions as a fundraiser. The key to holding an auction is to ensure it is part of a fun event welcoming to all members and those in the community. Your auction can be a silent auction, live auction, or both. Some things to keep in mind to ensure you have a successful night:

1. Establish your auction rules and ensure all the participants know the rules in advance (bidding open and close times, pre-event bidding, do you have to be present to win, the timeframe in which the customer pays, etc.)
2. Determine whether you will conduct the auction or partner with a third party.
3. Reach out to your principal for intangible items (a day in the library, a game with the principal during lunch, a parking spot at band concerts, hallway naming for a year, etc.).
4. Reach out to local businesses for gift cards and physical items. Popular items include jewelry, pest control services, massages, and tutoring.
5. Request items from online vendors by searching "donation request XXX" (where XXX is your city or area, or state) to find options. Advanced planning is key! Reach out to state sports teams, colleges, etc.
6. Work with donors and your committee to collect items for themed gift baskets.
7. Market your items. If doing an in-person auction, appealingly, display your items on covered tables considering traffic flow. If doing an online auction, photograph and upload your items. If applicable, share detailed descriptions of each item and include a redemption timeline.
  - Include the fair market value of each item on the bid sheet and a starting bid and bidding increments. Consider including an "ALL SALES ARE FINAL" disclaimer. We have seen companies go out of business and then want to give the PTA to give them their back.
  - Ensure you know the expiration date for any certificates or services, and ensure they are advertised.
  - Do not set out actual gift cards or certificates unless wrapped up in a basket or included with a bigger item. You can have a copy of the gift card or certificate out to display but keep the original in a safe place until check out.
8. If items in the auction are taxable, consider using one of the PTA's two tax-free days for the auction. If a tax-free day is not established, the PTA must collect and remit sales tax on all taxable items. For more information on this, consult the Treasurer's Resource Guide and your PTA's treasurer.
9. Determine if you are going to accept credit cards. Consider having two check-out lines – one for cash or check and one for credit cards. Ensure your membership has voted to authorize e-commerce transactions and that all payments go directly to a PTA account.
10. Don't forget to thank your donors, bidders, and volunteers! See the Donors and Sponsorships section for more information on IRS requirements for donor acknowledgment.

## **Commercial Co-Venturing**

Commercial co-venturing is when a business advertises a cooperative fundraising effort. A portion of their sales will be forwarded to the PTA as a gift. The size of the gift is determined by how successful the business is in selling its product or service. An example of this might be that an insurance agent agrees to pay your PTA a certain amount for each family who signs up with them.

Given PTA's non-commercial policy, passive is the only appropriate role in such a venture. The PTA must refrain from active promotion or marketing of the business's products or services and do no more than inform members of the agreement. Structure agreements so as not to appear as an endorsement of a product or company. If this is not possible, the PTA should choose to not participate.

## **Individual Donors**

Direct donation drives can be a time-efficient and cost-effective way to raise the additional funds your PTA needs. Offering a single, direct fundraiser may work well in communities experiencing "giving fatigue" from too many events.

#### Tips:

- Highlight your fundraising goal and suggested amount or a range of donation options per donor. Consider calculating a price per child your PTA needs to fund your year. This gives the families a clear picture of what they need, and they might be more likely to give.
- Provide a list of the many programs your PTA has planned for the year that the donation will help support (e.g., PTA parent engagement programs, library books, playground equipment, drug prevention activities, school dances, etc.).
- Provide an incentive by listing donors on the PTA website according to their giving levels (e.g., platinum, gold, silver, bronze).
- Throw in a promise not to ask them to sell or buy anything the rest of the year if your PTA can meet their donation goal.
- Make it easy by offering an online giving option.
- Double your impact by asking families to explore whether their employers will match donations.
- Some donors will need a tax acknowledgment for tax deduction purposes. Even if not needed, donors may appreciate a reminder of their donations at the end of the calendar year. Work with the treasurer to ensure donors are properly thanked and any receipts needed or requested are provided. See the tax acknowledgment for donors and sponsors section below for more details.
- Consider writing a personal thank you note to those families that give over a certain amount. For example, your PTA might want to thank families for a single \$100 or more donation.

Increasing your fundraising in small increments is bundling or asking families for a round-up. Here are examples of these:

- **Bundling**
  - Example 1 - \$20 = PTA membership (\$7 value) + PTA members-only t-shirt (\$8 cost) + Donation (\$5)
  - Example 2 - \$25 = PTA membership (\$7 value) + School yard sign (\$8 cost) + Donation (\$10)
- **Rounding Up**
  - Example - \$10 for \$7 membership + \$3 donation

#### Sponsorships/Partnerships

PTAs may offer PTA sponsorships or partnerships in return for intangible benefits. For example, for a \$250 sponsorship, a PTA may include a company's logo and name in its monthly newsletter, a banner on the school fence, and a post on its social media site. PTAs often provide tiers of sponsorships based on donation levels. The guidelines for sponsorships mirror the noncommercial policy and co-venturing guidelines.

Many PTAs run very successful sponsorship fundraising campaigns. Here are some things to consider:

1. Determine the benefits and price of sponsorship packages. Benefits may include social media shout-outs, sponsor banners on campus, including names in the newsletter and/or meeting agenda, etc. Consider general and event-specific sponsorships.
2. **Structure agreements so as not to appear as an endorsement of a product or company.** Rather than posting to buy their merchandise, mention the company and its support of your PTA.
3. Decide whether to require cash or allow an in-kind donation (t-shirts, food, etc.) to pay for a sponsorship.
4. Consider the optics of who sponsors your PTA. Verify that their business is not in conflict with the PTA mission.
5. Solicit sponsors at the end of the prior fiscal year to have them in place for next year's budget.
6. Ask community members, businesses, and/or parents to become PTA sponsors.
7. Email and call potential sponsors. Market opportunity on social media. Ask your local business association to include your sponsorship opportunity in their newsletter publication.
8. Consider forming a partnership with your sponsors. Invite them to your PTA events, ask them to volunteer, and keep them informed of PTA news.
9. **Ensure your PTA's role is a passive one.** Share the company name and thank them for their support rather than mentioning that a company is your exclusive partner.
10. Live up to your end of the sponsorship agreement, and be sure your sponsor knows when you do.



Getting corporate sponsorship can be as simple as encouraging executive board members to ask their employers to buy a table's worth of tickets for an annual dinner event. Other times, you will want to look for major sponsorships, such as offering to make a company the lead name on your event.

### ***Thanking Sponsors***

Thank yous must be limited to an expression of thanks and can list identifying information for the sponsor. The expression cannot request that people patronize the sponsor or buy its products; otherwise, the sponsorship payment will be subject to federal income tax.

Here are some ideas for thanking sponsors:

- Placing posters throughout the school thanking the sponsor
- Hanging banners at the sponsored event
- Hanging banners around the school
- Placing a thank you in the PTA newsletter
- Use social media to thank the sponsor (Facebook, Twitter)
- Place a thank you on the PTA website
- Place a thank you on the school marquee
- Thank you notes or letters from students in their place of business. Student artwork could be displayed with the notes.

### ***Tax Acknowledgement for Donors and Sponsors***

In addition to the above thank you ideas; the PTA should provide an acknowledgment in the following situations:

- **For a cash donation of more than \$250**, the PTA must provide an acknowledgment that includes:
  - The PTA's name;
  - The amount of money donated;
  - The date of the contribution; and
  - A statement that no goods or services were received in return for the contribution.
- **Donors may also request an acknowledgment for smaller donations**, particularly if they are made in cash (rather than by check). The same acknowledgment is required if a volunteer wants to claim a deduction for PTA-related expenses.
- **If goods or services are provided in exchange for a donation of more than \$75**, the PTA must provide a receipt to the donor that states the amount of the payment, a description of the goods/services provided, and a good-faith estimate of their value.
- **If a contributor donates something other than money (e.g., in-kind goods)**, the donor must obtain Form 8283 and have the PTA sign it to acknowledge the donation. Your PTA may want to remind them to use this form as a service to donors.

Sample acknowledgment letters/donation receipts may be found at [txpta.org/treasurer](http://txpta.org/treasurer). PTAs are required by IRS disclosure rules to inform prospective donors about how their contributions are legally tax-deductible.

### ***Projects/Events***

PTAs can sponsor projects and events, such as after-graduation lock-ins, after-prom lock-ins, grade-level banquets, etc., as long as proper procedures are followed.

These types of events should be run via the PTA committee structure. Each PTA annual event includes a standing committee, a detailed plan of work approved by the executive board, and a line item in the budget. Suppose the project or event occurs only once, as in the case of a campus anniversary or rededication ceremony. In that case, the executive board creates a special committee with a line item in the budget.

Any income from these PTA-sponsored projects/events (ticket sales, donations, etc.) is considered PTA income and should be deposited to a PTA bank account. The PTA budget and financial reports should contain income and expense line items for these projects/events. The PTA should retain insurance (liability and fidelity bond, accidental medical, officers' liability) for these projects/events to be covered. The school district's insurance does not cover the PTA.

PTA funds, including these project/event funds, may not be used to benefit an individual. Individual benefits must be considered whenever prizes are offered to attendees. Small nominal prizes may be provided to

participants (for example, a gift basket with coupons, first aid kits donated by a local hospital, a toothbrush, toothpaste, a 99-cent laundry bag, and/or promotional items from local businesses or PTA).

## Grants

Grant funds can support PTAs in running a program or making a program accessible to all students. Unlike most donations, grants are typically linked to a particular project. To receive most grants, you will have to identify a need, develop a plan, and (if successful in obtaining a grant) be prepared to report back on how you used the money and what you achieved.

Tips for pursuing grant funding:

- Create a committee. Include a representative from your school or district who can help you find local school data or secure letters of support. Engage a parent with experience and interest in writing proposals.
- Match your need to a funder's interests. Be sure to send your application only to a funder who has indicated an interest in the type of project you're proposing. Lists of previously funded projects can be great sources of this information.
- Follow instructions! Most grantmakers are very specific about how they want to receive proposals. Be sure to follow all guidelines about the format, deadlines, the number of copies to submit, etc.
- If you get the grant, thank your funder. If possible, invite a representative of the funding organization to an assembly, school event, or a photo opportunity with the finished project.
- If you don't get a grant, ask why. Use any feedback you receive to strengthen future proposals.

Sources for PTA grants:

- National and Texas PTA offer grants and scholarships. See [PTA.org/awards](http://PTA.org/awards) and [txpta.org/awards-grants](http://txpta.org/awards-grants) for more information.
- Your local chamber of commerce is a good place to identify businesses in your area (or local offices for larger corporations) that may offer grants. Local retail and grocery chains often have grant programs for youth, family, or school projects.
- Private foundations are independent nonprofits that offer grants, usually keeping with set priority areas.
- Foundation grants can be competitive; you may have better luck with smaller, local foundations. The Foundation Center offers a wealth of information about finding and applying for foundation grants.

## Bingo

PTAs must consider all the regulations before committing to a bingo event and avoid participation unless they can assure complete compliance. Detailed rules may be obtained from the Texas Lottery Commission (TLC) Bingo Enabling Act, the Charitable Bingo Administrative Rules, and the Bingo Operations Manual found at [txbingo.org/export/sites/bingo/About\\_Us/Regulations\\_x\\_Statutes/index.html](http://txbingo.org/export/sites/bingo/About_Us/Regulations_x_Statutes/index.html). PTAs will also need to complete an Application for Temporary Bingo Occasions for Non-Licensed Organization if they decide to proceed with the process. *A license is still required even if the games are just for fun, where no entry fees are collected.*

The TLC must receive the application and all attachments at least 30 days before your first event. To obtain forms, visit the Texas Lottery Commission Charitable Bingo Forms page at [txbingo.org/export/sites/bingo/Forms/index.html](http://txbingo.org/export/sites/bingo/Forms/index.html). You may not advertise a Charitable Bingo before actually receiving your license.

## Raffles

Chapter 2002 of the Occupations Code, the Charitable Raffle Enabling Act, permits and regulates "raffles," which it defines as "the award of one or more prizes by chance at a single occasion among a single pool or group of persons who have paid or promised to pay a thing of value for a ticket that represents a chance to win a prize."

Raffles do not require a license. Local or Council PTAs must exist for at least three years before they can conduct a raffle. According to a Texas Attorney General, raffles are a legal activity for a PTA provided each of the following regulations is followed:

- Each ticket must have printed on it the name and address of the PTA, the name of an officer, the price of the ticket, and a description of each prize valued at \$10 or more. No prize may be valued at more than \$50,000.
- A PTA may hold no more than two raffles annually and only one at a time.

- Tickets may not be advertised statewide or through paid advertisements.
- A raffle prize may not be cash.
- The PTA must possess the prizes or post a bond for the full value with the county clerk.
- Only members of the sponsoring PTA, or their authorized representatives, may sell tickets. The PTA must complete a W2-G form to turn in to the IRS if the prize exceeds \$600. The winner or backup withholding must complete a W-9 at the rate of 31% must be collected by the PTA. Provided the prize value is less than \$5,000 and the recipient completes a W-9, the PTA is under no obligation to collect tax.
- No one may be compensated directly or indirectly for organizing or conducting a raffle or selling raffle tickets.

Although raffle prizes are often donated and not specifically purchased by a PTA, PTAs should be mindful of some prizes' perceptions and potential liability. For example, raffling alcohol, even at an off-campus event, may not be perceived to be in line with the mission and purpose of PTA.

Please see the Treasurer's Resource Guide for more information on PTA's IRS Group Exemption Ruling, Tax-free Days, Collecting and Reporting State Sales Tax, and a When to Collect Sales Tax table.

# Finance for Executive Board Members

## Financial Considerations

Every single executive board member should be knowledgeable about the financial responsibilities of the PTA. Below is basic information on finances that every executive board member needs to know. There is so much more involved in the everyday financial management of a PTA...these are the basics.

## Fiduciary Responsibility

The Internal Revenue Service (IRS) (as included on Form 990) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including executive board member “fiduciary duty.”

Executive board members have three fundamental fiduciary duties: a duty of care, a duty of loyalty, and a duty of obedience.

- The **duty of care** means that the executive board member actively participates, attends executive board meetings, is educated on the industry, provides strategic direction, and oversees the day-to-day operations of the PTA;
- The **duty of loyalty** requires the executive board member to operate in the interest of the local PTA and not to use the position to further personal agenda;
- The **duty of obedience** requires the executive board to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS. Obedience to governing documents requires a deep understanding of the operating documents (by-laws, rules, executive board manuals). Finally, obedience requires that the executive board not act outside the scope of the organization’s legal documents.

Fiduciary responsibility in a PTA means the executive board members act as trustees of the organization’s assets and must exercise due diligence to oversee that the organization is well-managed and that its financial situation remains sound. The executive board verifies that all filing requirements and tax obligations are completed. If theft, fraud, or embezzlement is suspected, a PTA must follow the Texas PTA Theft, Fraud, and Embezzlement policy.

## Budget Basics

The budget creates the framework for program management and overall administrative decisions. An approved budget must be in place at all times for expenditures to be made and fundraisers to be conducted. The budget for the following year is presented and adopted by the membership at the last membership meeting of the year. It is amended at the first membership meeting based upon approved Plans of Work submitted by the new executive board members. The members always approve expenses and income via the budget, which can be amended as needed.

## Payments

Payments are never made in cash, and blank checks are never issued. All payments must relate to an approved budget item and have a funds request form attached with a receipt and/or invoice. No other organization may pass its money through the PTA account to achieve tax-exempt status, and money can never be “turned over” to the school and/or principal to spend at their discretion.

## Deposits

All monies collected are turned over to the treasurer as soon as possible. At least two people count money simultaneously, and both counters and the treasurer each sign and keep a copy of the completed deposit form. The treasurer may be one of the two counters.

## Financial Reports

To keep people informed, a current financial report is presented at every regular executive board and membership meeting that covers the financials since the last meeting of that type. The financial report should include each budget line’s current period actuals, year-to-date actuals, and the approved budget amount. The verbal report should include the starting balance, total income, and total expenses for the current period, the change to sales tax and state/national dues liability during the current period, and the ending balance. As the funds belong to the members, they have the right to access the financial reports presented at membership meetings.

**Statement Reviews**

The president appoints a member, subject to the executive board's approval, who is not authorized to sign on the bank account to review each account statement. The statement reviewer utilizes the Texas PTA Statement Review by Non-Signer Form. The secretary presents the result of this review at the executive board meeting.

**Financial Reconciliation**

A financial reconciliation is performed: at the end of the fiscal year when any authorized check signer is added or deleted on any bank account; and at any time deemed necessary by the president or three (3) or more members. The president appoints the financial reconciliation committee consisting of not less than three (3) members who are not authorized signers, the current secretary, incoming treasurer, nor be related by blood or marriage or reside in the same household as the authorized signers or current secretary. The financial reconciliation committee report shall be adopted by a majority vote of the association at the regular membership meeting immediately following the financial reconciliation.

**Insurance**

It is in the PTA's best interest to cover the treasurer and all other persons authorized to handle money with an embezzlement (bond) policy and directors and officers liability insurance to cover losses through any fraudulent or dishonest act. Insurance premiums are budgeted as an expense line. For these policies to apply, account statements are regularly reviewed by a non-signer, and financial reconciliations occur at least annually.

For more details on financial procedures for your PTA, please visit [txpta.org/treasurer](http://txpta.org/treasurer).

# Keeping Records

Compiling and maintaining a complete record of your activities can help those PTA Leaders who follow behind you. Passing along important information to your successor gives them what they need to get started! New Leaders who access previously implemented PTA practices can more easily adjust and make needed changes. Additionally, a PTA should closely follow its records retention policy to be sure they are properly storing the records they need to maintain regulatory compliance.

## How to Compile Your Records

Ask yourself, “If I knew nothing about the job, could I do it with this information?” Depending on your position, you may need hard copy materials at your fingertips. If so, use a loose-leaf folder or binder with tabbed dividers. Other positions could easily keep their records electronically via cloud-based storage or a USB drive.

## Suggested Content

### *Bylaws/Standing Rules*

- A current, date-stamped copy of the PTA Bylaws and Standing Rules. Each year (after August 1), the parliamentarian should request a copy of your PTA's bylaws and standing rules from Texas PTA. They should be distributed to all executive board members and reviewed annually. Visit [www.txpta.org/bylaws](http://www.txpta.org/bylaws) for the request form and more information.

### *Rosters*

- Current roster of executive board members with their contact information
- Contact information for Texas PTA Field Service Representative, Council PTAs (if applicable), Texas PTA Board members with comparable responsibilities, the Texas PTA State Office
- Resources, and related agencies and organizations in the community relevant to your position

### *Items Related To Your Position (As Applicable)*

- Description and responsibilities of your position
- Current Texas PTA BASICS Resource Guide(s)
- Plan of Work approved by the executive board
- Reports prepared for meetings (executive board, membership, and committee)
- Financial records including approved budgets, detailed reports with copies of your PTA Funds Request Forms with receipts, and copies of all deposit forms that you have signed
- Promotional material, newsletter articles, evaluations, etc.
- Award applications submitted to Council, Texas, or National PTA
- Summary of your term, including recommendations for the following year

### *PTA Meetings*

- Agendas and approved minutes from each meeting
- Financial reports
- Relevant committee reports
- Information on upcoming events and programs sponsored by PTA at all levels
- Record of volunteer hours to be reported to the volunteer coordinator (if applicable)

# Standards of Continuing Affiliation



Each membership year, Local PTAs must meet **both** of the following requirements to attain Active Status with Texas PTA. The membership year begins on August 1.

1. Remit to Texas PTA state and national membership dues for at least 20 members.
2. Submit to Texas PTA the name and contact information (mailing address, phone number, and email address) of at least one current executive board member, preferably the president.

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Local PTAs must comply with **all** of the following standards to remain in Good Standing with Texas PTA. Local PTAs that do not maintain Good Standing will be subject to a Local PTA Retention Plan as described below.

1. Maintain Active Status with Texas PTA.<sup>1</sup> (see requirements above)
2. Report all additional members and remit state/national dues to Texas PTA each year.
3. Submit to Texas PTA the name and contact information for all additional executive board members within 15 days of election or appointment.<sup>2</sup>
4. Review Local PTA bylaws (and standing rules, if applicable) every three years and submit to Texas PTA for approval.<sup>3</sup>
5. Each year, within 60 days of fiscal year-end, electronically file and have accepted by the IRS the appropriate "Form 990 Return of Organization Exempt from Income Tax".

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## **Local PTA Retention Plan (initiated when a Local PTA does not maintain Good Standing)**

**Notification:** Texas PTA will notify the PTA of the actions required to attain Good Standing. The PTA will have 30 days from the date of the notification to meet all Good Standing requirements to avoid moving into the Restriction Phase.\*

**Restriction:** While in the Restriction Phase, the PTA is not eligible for awards, programs, or grants administered by Texas PTA or National PTA. The PTA will have 30 days to meet all Good Standing requirements to avoid moving into the Restructure Phase.

**Restructure:** For PTAs that do not attain Good Standing following the Notification and Restriction Phases, Texas PTA may begin the process of restructuring the leadership of the PTA or revoking the PTA's charter. A PTA that signs an Action Plan may temporarily move into Intervention, giving them time to resolve any outstanding issues. The PTA will continue to be ineligible for awards, programs, and grants administered by Texas PTA and National PTA until Good Standing is achieved.

**Intervention:** Once in the Intervention Phase, Texas PTA will assign a support team to assist the PTA. If all Action Plan requirements are not resolved by the agreed-upon date, the PTA will be moved back into Restructure. *\*With cause, Texas PTA may place a Local PTA that has not met all Good Standing Requirements into the Intervention Phase early.*

1. *Active Status is used to determine eligibility in many Texas PTA programs and services. Please reference specific program eligibility requirements to ensure your PTAs participation.*
2. *PTAs submit executive board member information to Texas PTA electronically via the Texas PTA website.*
3. *Bylaws are submitted via the Bylaws Submission Form found on the Texas PTA website.*
4. *Proof of filing and acceptance is the Exempt Organization Business Master File issued regularly by the IRS.*



# Resources

Texas PTA believes that volunteer at-home accessibility to FOUNDATIONS Training is important. As such, training can be found at [txpta.org/courses](http://txpta.org/courses). Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong Local and Council PTAs.

## FOUNDATIONS Trainings:

1. **ESSENTIALS** is a high-level orientation to PTA that is taken online via the Texas PTA website at [www.txpta.org/training](http://www.txpta.org/training). It contains the mainstay information that every PTA Leader should know. Executive board members should take this training at least once in their PTA career. Leaders are encouraged to take Essentials (formerly titled Foundations Leader Orientation and Leadership Orientation Training) again whenever the training is updated.
2. **BASICS** contain detailed information to support PTA Leaders in their specific executive board position. Every executive board member must attend a BASICS course for their specific position at least once every two years. These training sessions are available on-demand via the Texas PTA website. Visit us online at [www.txpta.org/training](http://www.txpta.org/training) to register.
  - a. BASICS includes a workshop and companion Resource Guide, along with other supporting resources.
  - b. PTA Leaders can access the Resource Guides via the Texas PTA website or online store. Visit [www.txpta.org/local-pta-leaders](http://www.txpta.org/local-pta-leaders) to download free PDFs or [www.txpta.org/shop](http://www.txpta.org/shop) to purchase hard copies.
3. **SPOTLIGHTS** offers a short, in-depth review of some of the specific yet important topics and recurring PTA functions such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections. Spotlights are free and are not mandatory but offer vital insights on specific and timely topics.

Reminder: Both the ESSENTIALS and BASICS are mandatory for executive board members. Visit [www.txpta.org/training](http://www.txpta.org/training) to learn more!

## Newsletters and Alerts:

Texas PTA provides content-specific newsletters based on your PTA position. Please submit your information to Texas PTA each year. Registering as a Local PTA Leader will help ensure you receive important updates and position-specific newsletters! Visit [www.txpta.org/officer-intake](http://www.txpta.org/officer-intake) to access the form.

All executive board members are encouraged to closely follow Texas PTA legislative advocacy efforts by subscribing to Under the Dome, our advocacy newsletter. Sign up at [txpta.org/take-action](http://txpta.org/take-action).

## Leadership Development Resources:

Texas PTA training goes beyond the FOUNDATIONS by offering Leadership Development resources. The topics covered are the result of polling local and council PTA leaders across the state.

All PTA leaders are encouraged to go to [txpta.org/leadership](http://txpta.org/leadership) to discover what Extra Credit course they might like to take next to continue exploring their leadership development and investigate the Full Circle Leadership development program rolled out in March of 2022.



# Texas PTA Staff and Board Support

## **BOARD OF DIRECTORS** | [Contact Form](#)

The Texas PTA Board of Directors are your volunteer representatives at the state level. From the president to the secretary, Texas PTA Board can help answer your questions and address your individual needs. You can reach them at: <https://bit.ly/3zp81Es>.

## **COMMUNICATIONS** | [communications@txpta.org](mailto:communications@txpta.org)

The Communications team manages and produces all Texas PTA communications, including *The Voice* (our quarterly newsletter), specialized newsletters (advocacy, healthy lifestyles, arts in education, environmental awareness, membership, and field service), social media outlets, and the Texas PTA website. They also serve as Texas PTA's contact for all media inquiries.

## **FINANCE** | [finance@txpta.org](mailto:finance@txpta.org)

Texas PTA understands the responsibility of managing your member dollars. The Finance team is charged with monitoring Texas PTA resources according to the annual budget, as adopted by the Board of Directors.

Members of the Finance team are also available to support PTA leaders in their compliance with state and federal financial requirements, such as filing the annual 990 with the IRS and sales tax filings with the State Comptroller.

## **MEMBER SERVICES** | [memberservices@txpta.org](mailto:memberservices@txpta.org)

The Member Services team gives direct support to PTA leaders and members. They assist with member recruitment strategies, bylaws and standing rules, organizing PTAs, and general questions on leading and managing a PTA.

The Member Services team is responsible for developing recruiting resources that may be adapted for all levels of PTA – early childhood, elementary and secondary. Staff processes officer information, membership rosters and dues, and requests for copies of bylaws and standing rules. Staff also coordinates membership awards and the distribution of membership cards to Local PTAs.

## **PROGRAMS** | [programs@txpta.org](mailto:programs@txpta.org)

The Programs team is focused on connecting PTA members and leaders with the information they need to be successful and develop programs. Whether your PTA is registering for LAUNCH or requesting a Connect Program, the Programs team is available to assist you.

The Programs team is also your contact for student programs, such as Reflections, Camp Just Imagine, and Texas PTA's scholarship program.

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Texas PTA



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THIS ITEM IS FOR PTA USE ONLY