

## PTA Fundraising Policies and Guidelines

- 1) This document will be presented for approval to the PTA Executive Board and the PTA General Membership. Any amendments to this policy must be voted on and approved by same.
- 2) All funds raised will be distributed by PTA budgeting rules per PTA bylaws.
- 3) There are two main sources of fundraising:
  - a) **The Annual Campaign.** The annual campaign is directed towards supplementing the school with equipment and materials. Parents are asked to contribute funds directly to the PTA. All funds are turned over to the school and purchase decisions will be made by the school's administration. The PTA will facilitate the process, but will hold no decision making role in the process. Examples of needs funded are shown in Exhibit A.
  - b) **Summer Reading Program.** The PTA's operating needs are met through various other fundraisers, primarily the summer reading program. Examples of needs funded are shown in Exhibit A.
  - c) All additional fundraisers must be approved and conducted in accordance with this policy.
- 4) It is the intention of the PTA to minimize the need to collect money for supplies, events and other needs outside of fundraisers. Fundraising should cover all budgeted expenses for items OR budgeted expenses should be adjusted to meet the funds raised. There will be exceptions to this guideline including:
  - a) Purely social events. Attendees will be charged fees to cover costs of the event. This includes parent only events and whole family events.
  - b) Overnight field trips. Parents will be expected to cover the costs of such trips. The PTA may assist with scholarships for students who cannot cover the cost.
  - c) Clubs. Participants may be charged a fee to participate in any after school clubs.
- 5) Teachers and staff will be discouraged from asking parents to make significant individual or group donations of money or in-kind gifts to their classroom. Teacher and staff needs should be submitted to the school administration to ensure equitable distribution of funds and to encourage parents to contribute to approved fundraisers that benefit the entire school. This guideline does **not** apply to small supply needs for classroom parties or projects or standard school supplies.
- 6) All additional fundraisers must be approved by PTA Exec Board and school administration. In addition, all fundraisers must be conducted in accordance with applicable CMS policies and applicable PTA policies. The following procedures will be followed:
  - a) The PTA Executive Board will consider new fundraising ideas at its regularly scheduled meetings. All proposals must be submitted in writing no later than two weeks prior to these meetings and two months in advance of the proposed event.
  - b) Parent-owned and local businesses, such as restaurants and stores, will be allowed to sponsor events with a certain percentage of proceeds benefitting the school pursuant to the following:
    - i) Only one sponsored event every other month will be permitted. Requests and events will be treated on a rotating basis.
    - ii) The business must obtain CMS and PTA approval of flyer or advertisement sent home with students (i.e. through take-home folders).
    - iii) The PTA will advertise the event through normal channels. Businesses will not be permitted to send flyers or advertisements home with students except as specifically provided above.
    - iv) No business shall be permitted to sponsor more than two events per year.
    - v) Priority will be given to parent-owned businesses over non parent-owned businesses.
    - vi) Priority will be given to fundraisers that have a secondary benefit to the school, students or parents (such as a book fair where families are able to purchase books for the school).

- vii) Priority will be given to events the PTA Executive Board estimates to generate the most revenue for the school.
- 7) Programs which involve a percentage of retail sales proceeds being remitted to the PTA that do not require any active efforts on the PTA's part (such as Harris Teeter VIC cards, Lands End sales, etc.) are generally accepted and are not considered fundraisers for purposes of this policy.
  - 8) Programs and initiatives which generate income for the PTA, but are conducted primarily as a service to the school (such as spirit wear sales, student directory advertising, and student yearbook sales) are not considered fundraisers for purposes of this policy.
  - 9) Donated or at-cost goods given for PTA events (such as food donated for a social event or prizes donated for a raffle) are not considered fundraisers for the purposes of this policy. Businesses making contributions of this kind may be recognized or thanked by the PTA as deemed appropriate by the PTA Executive Board. Recognition will be limited to inclusion on flyers regarding the events and other existing PTA communications media. PTA will not allow separate advertisements to be sent home with students as trade or payments for goods contributed.

## **Exhibit A**

### **Equipment and Materials (funded by Annual Campaign with priorities set by school administration)**

This includes classroom, school and curriculum needs not covered by CMS (both durable and consumable). Some examples are:

- Additional technology such as SMART Boards, computers, printers, headsets
- Additional staff development/training
- Additional Media Center resources such as books, videos, etc.
- Supplemental curriculum and instructional materials for classrooms and special areas
- Subscriptions to instructional websites or software licenses for instructional software
- Supplemental office supplies for teachers and staff, including copy paper
- Building and grounds enhancements, such as playground equipment

### **PTA's Operating Budget (funded by summer reading program with priorities set by PTA)**

This includes all PTA committee budgets, other events and some re-occurring classroom needs. Some examples are:

- Staff Appreciation
- Grounds maintenance
- Field Trips
- Teacher Discretionary funds
- Weekly student newsletters (such as Scholastic News or Weekly Reader)
- Student field day
- Supplemental art supplies
- Support for musical programs
- Student recognition for AR and EOG testing
- Prospective parent events
- Administrative fees such as bank service charges, accountant's fees, PTA bonding insurance
- Maintenance of technology such as printer ink and SMART Board bulbs
- Health room supplies