

# Welcome to 2025 Leadership Convention

This session will begin soon



# 5G - Fundraising Fundamentals: Creating a Roadmap for Success

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# Utah PTA Mission

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



*PTA's don't exist to fundraise, they fundraise to exist.*



*Creating the “perfect” fundraiser is going to look different for every school.*



**What is the definition of  
a successful fundraiser?**



# Getting Started: *Planning for your next fundraiser starts right now!*

End of Year to do:

- Evaluate the programs, activities and expenses for the year
  - What went well? What didn't go well?
  - What would you keep the same? What would you do differently?
  - Where did you actually spend your budget?
- Do a needs assessment
  - What programs and activities are of value to your school community?
  - What programs and activities need to be changed, replaced or eliminated?



# What is a Needs Assessment?

A needs assessment is a tool to help identify the needs, concerns, and priorities of:

- parents
- teachers
- students
- other stakeholders within the school community

This assessment typically involves gathering feedback through

- surveys
- Interviews
- focus groups
- etc.

Sample needs assessments and guides can be found on

[www.utahpta.org/needs-assessments](http://www.utahpta.org/needs-assessments)



# Create a Plan

As a board, determine your goals for the coming year using the information you have gathered.

1. Create a list of activities and programs you want for you PTA in the coming year.
2. Create a timeline/calendar
3. Create a budget including **all** potential expenses
4. Determine what funding you will need to raise
5. Evaluate if you plan is realistic and achievable



# Review Fundraising Policies

Bylaws, Standing Rules, Handbooks, & PTA Website

- How can funds be collected?
- [www.utahpta.org/fundraising-procedures](http://www.utahpta.org/fundraising-procedures)

District Fundraising Policies

- Number of Fundraisers allowed
- Approved Fundraising companies
- Other restrictions and/or policies (Ask your Region Support Committee Chair)

School Administration

- Principal approval
- School policies on advertising etc.

State and County Laws

- Drawings are allowed in Utah, Raffles are NOT.



# Look at All Sources of Income

- Fundraisers
- Memberships
- Donations
- Commercial Co-Venturing (Spirit Nights)
- Partnerships
- Grants
  - National PTA Grants [www.pta.org/home/run-your-pta/Awards-Grants](http://www.pta.org/home/run-your-pta/Awards-Grants)
  - Credit Unions
  - District Foundations
  - Other



# Types of Fundraisers

## Commercial Vendor Contracts

- Product or Service Sales designed by commercial company

## Donation Based Fundraisers

- Jog-a-thon
- Silent Auction

## Passive Fundraisers

- Receive a percentage of customer spending

## Design your own



# Fundraiser Idea Resources

- Convention Expo Hall (PTA trainings)
- Past PTA fundraisers
- District Approved Fundraiser list
- Other PTAs (Council Meetings, PTA Facebook pages)
- Givebacks
- Needs Assessment (Ask about fundraisers)
- Internet search (use caution)
- Local businesses
- School District Foundations



# Things to Keep in Mind

- Other organizations/clubs fundraising within the school
- Feeder School Systems
- Other Schools and organizations fundraising in the area (charter, private, community sports teams, etc.)
- Time of year
- Demographic makeup of school community
  - Different languages/cultures, religious observances, income etc.
- Manpower
- Cost to run the fundraiser
- Percentage of Profit (Aim for 40% or higher return)
- Prizes and rewards (Aim for award systems that reward the group as a whole not individuals)
- Carefully read over any contracts before signing
- [www.utahpta.org/fundraising-procedures](http://www.utahpta.org/fundraising-procedures) (Selection checklist)



# Advertising Your Fundraiser

- Advertise “Why” you are fundraising
  - Explain what your goals are for the year
  - Show how the funds raised will be used
  - Show the value of PTA
- Use multiple means of communication - Get the word out!
  - Flyers, newsletters, emails, social media, school website, school Marquee, phone calls, texts, drop off and pick up time.
  - Advertise at other school activities where possible.
- Accommodate cultural & language differences when advertising
- Make sure “PTA” is prominent on all advertising
- Give adequate time with advertising for everyone to be able to get involved.



# Getting the Community and Businesses involved

Give various opportunities for people to volunteer and help

- Online and in person sign ups
- Flyers sent home
- School communication

Talk to surrounding businesses about helping out

- Donating supplies, services, or funding
- Allowing advertising on property
- Remember to ask what you can do for them in return
- Businesses may request a copy of your exemption determination letter or 501 (c)3 letter. PTAs in good standing can request one by emailing [kids@utahpta.org](mailto:kids@utahpta.org).



# Running Your Fundraiser

- Have a Fundraiser chair
- When money is being collected:
  - Have everyone interacting with money sign the basic fiscal management form and the Ethics/Conflict of interest form
  - Plan for three people to count and deposit money daily
- Be clear on dates and deadlines to avoid confusion
- Always follow through on obligations
- Communicate what is happening throughout the process



# Show Appreciation After the Fundraiser

- Thank everyone who helped make your fundraiser a success:
  - volunteers, donors, businesses, school support staff, teachers, students, and parents.
- Consider a small gift or card for volunteers, donors and businesses.
- Show appreciation through all the same channels as you did your advertising.
- At the end of the year show appreciation again to those who helped and be sure to include pictures and an overview of how the funds were used throughout the year.



# Assess for Future success

- After your fundraiser, have a meeting with your board to discuss what went well and what could be improved with your fundraiser in the future.
- Create a procedure write up to go in your procedure book for future reference
  - [www.utahpta.org/procedure-books](http://www.utahpta.org/procedure-books)
  - Include all advertisements used, companies contacted, supplies purchased, a timeline, evaluation after completion, suggestion for next time, the itemized budget and any other documentation.



# Questions?



# Connect with us on social media



FACEBOOK

- Utah PTA
- Utah PTA Advocacy
- Utah PTA Super Secondary
- Utah PTA Excellent Elementary
- Utah PTA Treasurers
- Utah PTA Reflections
- Utah School Community Councils
- Utah PTA Battle of the Bands
- Utah PTA Teachers



# Connect with us on social media

INSTAGRAM - @UtahPTA



X - @UtahPTAOneVoice



PINTEREST - Utah PTA



YOUTUBE - Utah PTA One Voice



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