

Welcome to the 2026 Utah PTA Leadership Convention

We will begin soon!



Fundraising Fundamentals: Creating a Roadmap for Success

Presenter:

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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
- administrators
- other stakeholders within the school community



This assessment typically involves gathering feedback through

- surveys
- Interviews
- focus groups

Sample needs assessments and guides can be found on 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

District Fundraising Policies

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



Review Fundraising Policies (Continued)

School Administration

- Principal approval
- School policies on advertising etc.

State and County Laws

- No commingling funds
- 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
 - 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 - Virtual Expo Hall is still available through Whova App
- 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 (languages/cultures, religious observances, income etc.)
- Manpower
- Cost to run the fundraiser
- Percentage of Profit (Aim for 40% or higher in 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 (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
- Phone calls/text messages
- 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.

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
 - 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?

Collaboration/Sharing

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 Teachers
- Utah PTA Battle of the Bands

Connect with us on social media

INSTAGRAM - @UtahPTA



X - @UtahPTAOneVoice



PINTEREST - Utah PTA



YOUTUBE - Utah PTA One Voice



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