

How might things look different in a Socially Distant World?

“Be open to ideas. It’s about listening to the community and realizing, ‘Oh, we hadn’t thought about that. Let’s try it!’”

Finances, Budgeting, and Fundraising

*****Make sure to always discuss your ideas and plans with your PTA Board, school administrator(s) & General Membership (when necessary) to make sure to have approval for all Fundraisers/programs/events and their logistics.***

RESHAPING THE PTA BUDGET TO REFLECT REALITIES OF COVID 19

Some basic recommendations:

1. Determine what are essential operating expenses for 2020-21, including but not limited to:
 - o insurance,
 - o corporate renewal,
 - o legal services such as accountant for audit/tax preparation,
 - o council dues
2. Determine what are on-going programmatic items you want to keep in the budget, even if they are not fulfilled this year, including but not limited to:
 - o student activities (each local unit/council will have a list that is applicable to the work being done),
 - o teacher appreciation,
 - o cultural arts,
 - o parent education,
3. Determine what are “realistic” fund-raising ideas for the year, virtual or “live”

What new expenses may be incurred as the result of COVID 19

1. Does the PTA need a subscription to an electronic platform that will allow them to conduct business? (i.e.-Zoom, GoToMeeting, WebEx)
2. Will the PTA need to mail items to families requiring additional funds in administration to cover those costs?
3. Will the PTA be asked for refunds on dues, etc. if parents elect to remove students from school and send them to private school?

Should local units prepare two budgets for the different scenarios?

IT is suggested to create one budget and include notes. Your association will approve the budget at the first association meeting and approve changes throughout the year, so there

will be ample opportunity to amend the budget as needed when circumstances change. With the current uncertainty, it is suggested you overestimate expenses and underestimate income when preparing your initial budget.

Is your local unit going to change how they are going to handle processing payments at a distance?

- Are you going paperless by using a fillable electronic PDF form such as Google Forms?
OR Are you going to be dropping off and collecting paper forms?
- How will you keep accurate records*?
 - Requesting reimbursement
 - Requesting checks
 - Making Payments
 - How are you going to process getting dual signatures?
 - Collecting receipts: Drop off, scan/upload and send to treasurer?
 - How will you track your expenses, payments, reimbursements, & deposits?
- Discuss your plan with your Treasurer and explain your process and make sure to explain the policy and procedures you will with your board members

**(For detailed information on these topics, how to handle them, & more, refer to the Leadership Resource Section of <http://IllinoisPTA.org> password EveryChild20)*

Remember that PTA funds shouldn't be used to purchase personal gifts or gift cards. The PTA board is responsible to ensure that PTA funds are spent on PTA purposes, and there is no way to ensure that gift cards are used for their intended purpose once they've been given out.

Suggestions for fundraising during financially difficult times:

1. Have and communicate a clear, immediately relevant purpose. Be specific about exactly why they are raising money, how they are serving families and children where they are right now, and how PTA is working to make the current situation better or easier for the community.
2. Consider using reserve funds to make the most of donations. If your PTA has reserve funds, this is a good time to put those to use, so that families feel that their current donations are being used to meet the growing needs of the community.
3. Be aware of fundraising costs. Make sure there are not any hidden costs or charges that will eat up your bottom line.

Basic Types of Fundraising: *(Check with your Administration to make sure the online vendor meets any district requirements.)*

- Direct Donation (tax deductible with receipt)
 - Can be added to your MemberHub Store in small to larger increments
- Corporate Gift Matching
- Dine & Share
 - (you can incorporate a family scavenger hunt or other event in conjunction and have families post pictures on your social media)
- Food Trucks
 - (check with your Administration to get approval of where the truck can park, serve food, &/or any district or Safety guidelines you need to follow)
- Online Book Fair
 - Can you maximize any perks or free books as incentives, donations for classrooms, birthday books, etc.
- Virtual Walk-A-Thon
- Read-A-Thon
- Virtual Fun Run
- Fitness Challenge
- Game Night
- Gift card sales (sell prior to holidays, teacher appreciation, mother/father's day, etc.)
- Catalog sales
- Spirit wear- sell masks
 - (can you distribute items from a school pick up, can parents pick up at the vendor's location, or do all items need to be delivered directly to the purchaser?)

Fundraising Types (cont.)

- Sell Graduation Yard Signs
- Sell School Spirit Signs
- Catalog sales with direct mail delivery
- Go Fund me
- Crowdfunding
- Amazon SMILE
- Live Streamed Event/fundraiser
- Box Tops
- Movie party
- Virtual Gala or Un-Gala
- Virtual Talent Show
- Virtual Open Mic Night
- Host a Creative Virtual Marathon Fundraiser
- Virtual Cooking Lessons Fundraiser
- Virtual Paint or Craft Night Fundraiser
- Birthday Challenge Fundraiser
 - Members could challenge their followers to donate to your PTA in honor of their birthday

More Information on Types of Online Fundraising:

<https://www.soapboxengage.com/blog/1863-virtual-fundraising-ideas>

<https://www.wildapricot.com/blogs/newsblog/2020/04/21/online-fundraising#Crowdfunding>

Host an Online Auction: Reach out to local businesses for donations of vouchers, gift cards or other “to-be-used-in-the-future” items your families could use, then [host an event live](#) on an online conferencing platform

Silent Auction:

Some have used <http://32auctions.com> (some felt better than MemberHub based on feedback?) Start auctions on Monday ending on Thursday and families can pick up their winnings at the fun fair that evening.