

RUNNING YOUR PTA WHEN SCHOOL IS CLOSED

PART 2: FUNDRAISING & UNUSED FUNDS

LEADERSHIP RESOURCES



Illinois PTA is continuing its efforts to support our PTAs and PTA Councils by answering questions you may have about running your PTA in this unprecedented situation. Our previous part of this ongoing series is here:

- [Part 1: Meetings & Elections](#)

If you have questions not addressed here, please contact your Region or District Director or e-mail info@illinoispta.org.

We can't do our planned spring fundraiser. How can we meet our budget?

The first thing to do is to take a good, hard look at your budget. With schools closed at least through early May and possibly through the end of the school year, are there events that won't be happening? Does avoiding the costs of those events bring your budget into balance by the end of the school year? Consider what other cuts you could make to your budget to bring it into balance.

If even with cuts, your PTA is still facing a budget shortfall, consider how a spring fundraiser might be received by your community. Many families are facing layoffs or cuts in hours or salary, and may not have the funds to support the PTA at this time. Others may be working longer hours in essential occupations and not have the time or energy to be involved in a fundraiser. Can your PTA find a way to scrape by until the end of the school year?

If your PTA decides it must have a fundraiser this spring, consider how you are going to collect funds when people are not meeting in person. Think about ways that your fundraiser can also help meet family needs, perhaps by yoga stretch-a-thon that students can do at home rather than your usual walk-a-thon. Pair your fundraiser with community needs by donating a portion of funds raised to another non-profit agency like your local food bank. Be honest with your membership—consider a direct donation drive for just the amount your PTA needs to balance its budget for the year.

We usually do a spring fundraiser. Should we still do one?

Remember, the IRS requires all non-profit organizations to spend their funds to further their mission as laid out in their budget. That means that your PTA should not be fundraising just to raise funds or because you always have a fundraiser in the spring, but to meet your budgeted needs. If your budget shows your PTA can make it to the end of the fiscal year with some carry over for next year because of canceled events or spending that is not occurring because school is not in session, consider not having your previously-scheduled fundraiser. Many families are struggling financially with the current situation, and even those that are financially okay are likely devoting a lot of energy to coping with all that is going on.

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We can't hold our spring events. What do we do with our extra funds?

Your PTA is a non-profit organization, but that doesn't mean that your PTA must spend its balance down to zero each year. The IRS just wants to ensure that your PTA is not raising funds continuously and not spending it on your mission, causing your bank balance to just grow and grow. There is no maximum percentage of your budget that can't be carried over to the following year, so consider saving the extra funds to get a start on next year. Perhaps your PTA will not need a fundraiser next fall because of that.

Our PTA/PTA Council usually makes a year-end purchase to support our school/school district. Can we still do this?

You can, but if this is unbudgeted spending, your PTA membership must vote on what to do with the money by amending your budget (see [Part 1: Meetings & Elections](#)). And while we are all sympathetic to the situation our schools and districts find themselves in as they struggle to continue to educate our children without having them at school, your PTA or PTA Council should be looking ahead to the next school year.

At this point, it is difficult to predict what the start of the next school year will look like. Will it start on time with kids actually going to school? Will families still be struggling with layoffs or job losses, or if they've gone back to work, with paying off debts accumulated while they were laid off? It is really hard to know what the fundraising situation will be for your PTA or PTA Council in the fall, so a more conservative approach to discretionary spending at the end of the year might be prudent.

If your PTA or PTA Council decides to make an end-of-year purchase and has amended your budget appropriately, consider working with your school or district to determine what sort of purchase would have the greatest benefit for those students who have struggled or are struggling the most with the current situation.

What do we do about next year's fundraising?

It is really difficult to know for certain what the beginning of the 2020-2021 school year will look like or where your families will be financially. As you lay out your calendar for the coming school year, consider placing some of your more expensive events later in the year to allow your PTA some flexibility in fundraising.

Also consider how your families may experience an event. If shelter-in-place and physical distancing requirements extend through much of the summer, people may be reluctant to gather in close proximity to others at your traditional fall carnival or dance. Such events may be better received later in the year.

Finally, consider fundraisers that will integrate with what your school is trying to teach your kids. Focus on healthy fundraisers like a walk-a-thon. Brainstorm now what sort of fundraising could be done if school doesn't open until the end of 2020 and your families are all still in their homes.