

PEP ONE FUND FUNDRAISING DEFINITION SUBCOMMITTEE:

Recommendations to PEP & PTAs

The fundraising definitions subcommittee met to discuss ground rules for what activities should count as “fundraising” where the money raised should be transferred to the One Fund at year’s end. After attempts to inventory all the different activities involving a school PTA where money is given or collected, the committee realized that it would be inappropriate for a centralized small group to set down precise yes/no rules for specific events. The mission of PEP is to create a community where we are all committed to equitable educational experiences at every school in the District *and* we preserve the independence and problem-solving expertise at each PTA.

To that end, the Fundraising Definition Subcommittee recommends a Code of Best Practices and Considerations for determining whether income generated by any specific activity stays within the school that generated the income or should be transferred to the One Fund account by the PTA. Here is a list of best practices and considerations:

1. Remember that One Fund represents a change in how we think about PTA fundraising. PTAs are no longer fundraising “just in time.” PTAs will start the school year with an on-hand fixed amount to spend and will plan activities accordingly. During that school year, PTAs will raise money to support next year’s activities.
2. A PTA’s spending budget for the year is fixed at the beginning of the school year. Money raised in the current school year will not be used to increase the budget or spending for the current year. New money raised through any mechanism for general PTA operations goes to the One Fund to be distributed for the next school year.
 - a. *Example:* If a PTA has an unexpected loss in the community and wants to spend money on a memorial project, the PTA can vote to redirect funds from the current budget or make a plan to include that activity in the next year’s budget. The PTA can and should

remind families and donors that their giving is what makes it possible for the PTA to do activities like the memorial project.

- b. Example:* 5th grade graduation is a predictable event that should be included in the original budget set at the beginning of each year. PTAs can encourage general donations around the time of 5th grade graduation; those donations would go to One Fund at year's end.
- 3. If a PTA is receiving money to cover costs of a particular event ("pass-through" funds), the money should not be used to increase or replace funds in the original budget set at the beginning of the year.
 - a. Example:* if the PTA is organizing a field trip or yearbook and collecting money from families to pay the actual cost of the field trip or yearbook, the money collected is used to pay for each student's participation.
 - i. If parents contribute extra money to cover the costs of other students who may need assistance, the extra money can be used to cover costs to ensure full participation.
 - ii. If there is additional money after paying the total cost of the field trip or yearbook for all students, that extra money would count as fundraising and go to One Fund at year's end.
- 4. If a PTA is collecting money to replace individualized teacher/staff gift giving, then the PTA can redistribute whatever amount is collected to make gifts to teachers/staff in an equitable manner. That money should not be used to increase general PTA spending for the current school year. If more money is collected than is needed for the equitable gift plan, then the extra funds would go to One Fund.
 - a. Example:* A PTA could solicit donations for a pot of money to be given out to all teachers/staff during teacher appreciation week. If the PTA collects and then equitably gives out 100% of funds collected for that event, that is a pass-through event and funds would not go to One Fund.
 - b. Example:* Teacher appreciation week activities are a predictable event that should be included in the original budget set at the beginning of the year. PTAs can encourage general donations around the time of

teacher appreciation week; those donations would go to One Fund at year's end.

5. If a student group wants PTA support to raise funds for a student-led gift/event (e.g. graduating class gift), the PTA should ask: is this a gift/event that increases inequities within your school or across the district community? Or is this a gift/event that increases student leadership in creating community and equity (e.g. service project)?
6. PTAs should work to create events and traditions at the school that include the whole community in the event, and should use those events as an opportunity to ask families with the capacity to contribute at the level they can afford so that your PTA can continue these efforts in the future. (Models like this exist now in the philanthropic world - public radio is open to all for free, but relies heavily on people with capacity to contribute by "paying it forward" so that public radio can continue.)
7. If a PTA is feeling unsure whether an activity promotes equity or whether a use of funds is true to the one community fundraising spirit of One Fund, the PTA should consult with its own PEP Representatives and can ask to consult with the Development Committee of One Fund. These "equity check-ins" can contribute to the community-wide dialogue about the larger PEP project, and offer reference points as we collectively build our capacity for thinking and acting equitably.
8. PTAs should discuss One Fund and the equitable district-wide approach to fundraising with their principals, staff, and teachers to encourage a culture of district-wide equity and discourage efforts to fundraise in ways that only benefit one building or one classroom or exacerbate inequities in the academic experiences across District 65.