PTA EVENT & ACTIVITY PLANNING GUIDELINES

Thank you for volunteering your time and talent!!

The Whittier PTA is a volunteer-run 501(c)(3) organization under the authority of the Illinois PTA, a branch of the National PTA. Our non-profit status allows us the ability to fundraise and receive tax exemptions in order to fulfill our mission. All funds raised directly support the events, programs and services we organize for teachers, students and families.

See below for guidelines to aid your planning. Please reach out to our Principal and Executive Board if you have any questions. Thank you!

★ Working with the Principal and the Executive Board ★

The Principal and Executive Board depend on your expertise to make our PTA successful! We look forward to working collaboratively with all committees.

Here are some areas that need to be reviewed by the Principal and Board:

- Event Date: Please provide as soon as possible (with broad details, if available). **HERE** is a list of date and time considerations for scheduling an event. *For daytime events*: make sure to check if there are any assemblies, field trips, gifted/accelerated math pull-outs, etc.
- Event Details: Including location, cost, etc. Event flyers need to be reviewed prior to distribution.

★ Communicating Events and Activities ★

Below are the ways to 'get the word out' about your activity/event.

Please read the PTA Promotional Guidelines (**HERE**), which details why we are unable to promote, market or recruit for private businesses or other non-profit organizations. This includes within our newsletter/facebook, flyer distribution, as well as hosting other organizations at our events.

1. Whittier Weekly PTA Newsletter: submit your information **HERE**. Information will also be included in the PTA section of the Principal's What's-up at Whittier Newsletter.
    - We ask that all committees please send info to the Newsletter, as not everyone is on Facebook. This will ensure all families and teachers know about your activity/event!
2. Facebook: Post your information on the Whittier Facebook Page.
3. Flyers (for Student Backpacks): The PTA has a budget for committees to distribute paper copies/flyers. Color and black-and-white copies are the same price/sheet. The process for making copies in the Whittier front office can be found **HERE**.

★ Financial Forms & Reimbursements ★

HERE is a broad overview (see "How To: PTA Expenses and You"). Somethings to note:

- All volunteers must use the tax exempt when purchasing anything for PTA events (see link to website above). Please check your budget and ensure you have the funds.
- Please submit receipts promptly. Questions? Contact treasurer@whittierschoolpta.org

★ Frequency of Fundraisers ★

The Whittier PTA has 2 main fundraisers in Fall and Spring, with 'Experiences' connected to each of these events. In order for our PTA to maintain its non-profit 501(c)3 status, we need to balance our mission-based events/offerings with fundraising efforts. If our focus becomes revenue (functioning more like a for-profit) - we are no longer serving our mission and could jeopardize our non-profit standing with the IRS. More info is available on the IL PTA website: "Appropriate Use of PTA Funds".

- *Note: All communications/marketing of Experiences must state "Whittier [Fall/Spring] Experiences, in support of the [Fall/Spring] Fundraiser".*

★ Guidelines for Fall/Spring Fundraising Events ★

Our fall and spring events are meant to be community building through fundraising. Attendance/participation of Whittier's students, parents and families weighs equally as important as the funds raised. **Whittier PTA is extremely grateful to volunteers like you, as our school has been INCREDIBLY successful over the years with these 2 annual fundraising efforts!**

★ Ensuring All Families and Students Feel Welcome ★

The Whittier PTA aims for events to be as inclusive and accessible as possible. So that all students and family structures feel welcome, Whittier PTA hosts family events that are neither gender nor relationship-specific. We urge committee chairs to carefully consider the diverse needs of families and students when planning events, aligning with National PTA's mission, as well as school guidelines. Please reach out to your Executive Board about lowering financial barriers, if your event has a fee.

★ Online Payment Platforms ★

It's true - online payment platforms like Zelle and Venmo have made exchanging money much easier in the modern age! Unfortunately, most of these methods are not compliant with regulations for non-profit organizations. Their use by the Whittier PTA could result in our 501(c)(3) license being revoked. For more info, please review National PTAs "Online Payment Dos and Don'ts for PTAs".

★ Givebacks (formerly Memberhub) Platform ★

To make e-commerce, payment and fundraising easier, the Whittier PTA transitioned to Memberhub (now Givebacks) in 2022. This platform is endorsed by the IL PTA. We encourage fundraising committees to use Givebacks when possible. Please check in with the Executive Board prior to choosing a different platform, as the Treasurer will need to confirm its non-profit compliance and review the use/transaction fees.

HERE is a link to Givebacks Fundraising training, it is flexible, free and open to all volunteers!

★ IL PTA Policy on Fundraising, Events and Alcohol ★

HERE is a link to "Illinois PTA Policy on Fundraising and Alcohol".
Areas to note:

- Alcohol cannot be present at an event on school property
- Children cannot be present at an event with alcohol
- Alcohol cannot be purchased with PTA funds