



Best Practices for a Positive Working Relationship between Foundations & PTAs

- Meet over the summer to coordinate calendars & discuss fundraising (High Schools should include major booster club presidents in this meeting)
- Have a liaison to each other's Board of Directors who attends board meetings
- Principal (or his/her designee) a member of Foundation's Board (already a member of PTA's Executive Committee)
- Share vision/mission with each other
- Develop a marketing campaign to differentiate message & mission to parents. Send communication out on a pre-approved schedule and use various sources - newsletters, websites, social media, school news shows, hard copy flyers, etc. that reminds school community of missions of both entities.
- Collaborate on planning and promoting school-wide events. However, do not commingle funds from activities that occur at same event.
- Leaders of both organizations should develop an "elevator speech" so they are prepared to answer the question "Why should I support both?" or "How are you different?"
- Remember that everyone is there to serve the children

Frequently Asked Questions.

1. What are educational foundations?

Foundations are non-profit organizations dedicated to providing or enhancing educational opportunities that otherwise would not be a part of the instructional

program. They are separate legal entities from the school and the PTA with their own mission statement.

2. Why is there a need for foundations at schools?

In a time of continued austerity cuts at the state level coupled with lower local property tax collections, many schools have decided to establish foundations in order to have additional funding beyond that provided by school systems and PTAs in order to provide students with the tools and resources the local school leadership team wishes to provide.

PTAs are not fundraising organizations; they are legal entities focused on making every child's potential a reality through advocacy efforts, family engagement programs, enrichment activities, health & wellness programs, community engagement, among other things. PTAs raise funds to implement those programs in a given school year.

An educational foundation has greater flexibility on how to allocate its funds, and therefore is able to make purchases that not only fill gaps where school system tax dollars fall short, but also help to fulfill the vision and mission of the school.

3. How are foundations established?

Like any other nonprofit, foundations become incorporated with the Georgia Secretary of State (filing fees are app. \$200) and obtain 501c3 status with the IRS (filing fees app. \$850). Bylaws are drafted and passed as well. Many start-up foundations work with an attorney to complete the application process.

In Cobb County, foundations can choose to be organized under the [Cobb Schools Foundation](#) where for a small annual management fee, the Foundation provides insurance, record keeping, tax filing and other administrative functions.

Information for the **Paulding Education Foundation** can be found here:
<http://www.pauldingeducationfoundation.com/>

Information for the **Douglas County Public Education Trust** can be found here:
<http://douglaspubliceducationtrust.org/>

Information for the Marietta City Schools Foundation can be found here:
<http://mariettaschoolsfoundation.com/wp/>

4. What is the difference in fundraising and spending?

Foundations can fundraise for longer-term projects whereas PTAs spend most of their budgets in the same school year. Foundations are not bound by PTA spending guidelines that preclude PTAs from funding certain items like teachers' salaries. Each

PTA member has a say in which programs the PTA chooses to implement for the year. Foundation Boards identify goals and priorities and vote to support specific projects.

5. Can our school do one fundraiser and split the money between the PTA & Foundation?

Both nonprofits are highly encouraged to discuss this with their tax advisor. As a general rule, this arrangement is discouraged because of questions as to which entity the person made the tax-deductible donation, what the contribution was supporting or directed toward and tracking the funds.

6. Can PTAs make a contribution to Foundations?

Generally speaking, PTAs do not raise money or make contributions to other nonprofits. However, if a school Foundation is involved in a capital campaign for a specific item(s) that is in line with PTA's mission and vision, the PTA can make a contribution from an approved budget.

7. Can PTA officers serve on the Foundation's Board?

It is encouraged that each organization has a liaison to the other that is a Board position. It is not recommended that a PTA officer also serve as an officer with the Foundation. This can create confusion among parents and the school community, particular when it comes to fundraising.

8. How long should a capital campaign last?

It is recommended that a Foundation's capital campaign (the typical source of funds for an educational foundation) last 2-3 weeks. Going longer than that risks burn out among your volunteers and your audience tuning your message out. If you have not met your goal at that time, the Board should vote on how to proceed. Some options may be bringing back the campaign after the winter break, hosting other smaller types of fundraisers (spirit nights, sale of promotional items, writing grants) or organizing a different "big" event later in the school year. Being specific about how campaign funds will be used (e.g., science lab, technology, new playground) will help with messaging.