



Fundraising



General Fundraising Guidelines

Fundraising is basically anything you need to fill out a form to order

Age Appropriate

Separate PTA/PTSA and School Fundraisers

3-1 Rule – 3 Programs for every 1 Fundraiser

Plan Ahead

Attend Florida PTA Conference July 21-24, 2022

Be Sure to Fall in School Guidelines

1

Have a Use of Facility Agreement with School

2

Get Principal's approval

3

Vendors will need to be County approved and have School board listed on insurance

Memberhub Fundraising



A-THONS



AUCTIONS



CROWDFUNDING



EVENTS



RAFFLES



SWEEPSTAKES



PRODUCT
FUNDRAISERS



FUNDRAISER
PRIZES



Tracking your Fundraising Expense

Keep a copy of any contracts signed.(President should be the one to sign)

Be sure to have original receipts

All income is counted by 2 people

All expenses review by 2 people and checks have 2 signers

Accurately record all income and expense for each fundraiser

Report fundraising expenses on your 990EZ or 990 form



When you would need a W-9

Form W-9
Request for Taxpayer Identification Number and Certification
Give Form to the requester. Do not send to the IRS.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

5 Address (number, street, and apt. or suite no.) See instructions.

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Part II Certification
Under penalties of perjury, I certify that:

Sign Here Signature of U.S. person Date

General Instructions
Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Cat. No. 10231X Form W-9 (Rev. 10-2018)

- Some places may require a W-9 when you are booking a spirit night or other activity. Once you provide a W-9, this becomes a donation from the business and not a fundraiser you need to record
- <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

Go Fund Me

Go Fund Me fundraisers are allowed but only if this is for a program or purchase that will benefit the whole school

Restrict the funds if amount is not met and you need to roll over

You cannot use this for an individual.

<https://floridapta.org/media/2020/08/GoFundMe-INFO-NATIONAL-PTA.pdf>

Contact Us Any Time

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