



VIRGINIA PTA ANNUAL MEETING

Training Day

June 5 | Chester, VA



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PRESENTATION SPEAKER



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Creating Sustainable Community Support for Your PTA

- Welcome & Introductions
- How to Prepare for Fundraising
- Setting Up the Ask
- Having a Powerful Conversation
- Making the “Ask”
- Follow Up & Deliverables
- Stewardship
- Review & Questions

Introductions

1

Name

2

City or County

PTA Name (Elementary, Middle School or High School?)

3

Have you ever made an ask for a financial gift to support a non-profit?



GOAL: To help PTA leaders develop strategic fundraising and sponsorship practices that align with the mission and community goals. Participants will learn how to identify potential partners, communicate impact, cultivate donor relationships, and create sustainable support systems for PTA programs and events.

The Donor Cultivation Cycle

A five-step process to find, engage, and retain new donors.



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Types of Sponsors & Donors

1 In Kind Donations

2 Individual Donors/Sponsorship

3 Organizational (Business) Sponsors/Partners/Donors

How do you start?

Prospecting/Identifying

WARM LEADS! 

Who Has Supported PTA in the Past?

- Previous Donors are captive & more aware—warm calls and clearly similar interests
- Research Records (Treasurer can assist)
 - Ask Principal, Administration
 - If no records, good reason to start keeping records & track solicitation activity (Excel/Google Docs Easy Access)

How do you start?

Prospecting/Identifying

COLD LEADS! 

- Look hyper local (neighborhood around school)
- Be curious! Don't be afraid to ask questions of parents
- Research similar organizations and review their donor lists (Online & at Events)
- Attend PTA Conference & Visit Vendor Hall!

ASK YOURSELF

- Who in your Community would want to reach your organization's membership, client base, leadership?
- What mutual benefits can you articulate?

Qualification

- Know Your Prospect—Research
 - Type of Business (non profit/for profit, franchise?)
 - Leadership—Decision Makers
 - Marketing Needs (what do they currently do?)
 - Introduction Lead? Determining the best way to create a connection
 - What have they supported in the past?
 - How do they like to be “asked”?

Be Prepared

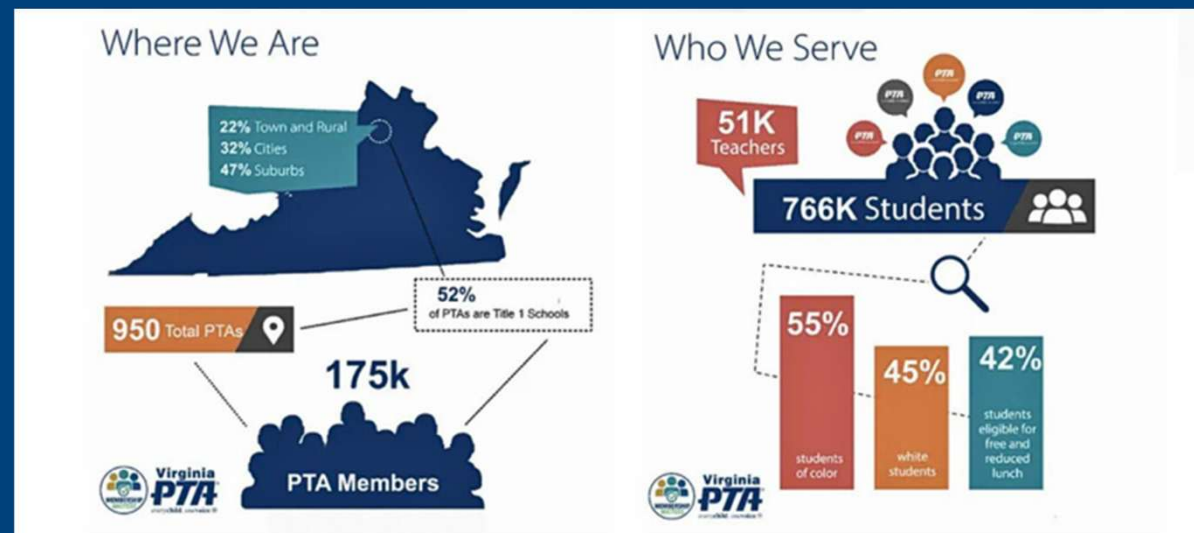
Create a Worksheet (Excel/Google Doc) to Track Prospects (be sure to include any past history/support)

Create a Timeline (work backwards from deadlines/event dates/print deadlines)

- Their Timeline versus Yours (FY vs. CY)
- Identify Your Target List
- Start way earlier than you think you need to! Corporate budgets are often set a year ahead.
- Track calls; Record Next Steps & Notes (for future volunteers and yourself)
- Committee Work (Communication is Key)

Be Prepared

- Print Materials ?
 - Information on PTA (Statistics)
 - Information on Event
 - Official “Ask” Letter or Proposal
 - Have W-9 Available
- Decide on Sponsor/Donor Events



Exercise

Group 1: Create a list of reasons why you feel donors should give to your PTA

- One List for Businesses
- One list for Individuals (think Grandparents, Community Members)

Group 2: Create a unique approach to presenting the mission and programs of the PTA

- They can be items that could be mailed/hand delivered and/or used in a meeting

Solicitation: The Ask

Getting in the Door

- Identify someone who can open the door for you to avoid a “Cold Call”
- How do they prefer to be contacted?
- Do any formal documents need to be completed? Grant Application, Online Request?
- Email, In Person or Via Phone/Zoom

Solicitation: The Conversation

The Conversation

- Be passionate about the Organization
 - Share How and Why Your Involved (Children's Names, Grade Levels)
 - Discuss your Favorite PTA Activity
 - Discuss how the PTA has helped you personally and how you have observed others being helped
- Be knowledgeable about the PTA's mission, programs, outcomes, future goals
 - Provide specific examples
 - Always know you can "find the answer" and circle back—creates an excuse to follow up
- Be ready to respond to reactions, criticism, questions and resistance
 - Be flexible:
 - Timing
 - How Donor Works
 - Their Needs
 - Accessing Level

Solicitation: The Ask

- Know what you're going to ask for, BUT be flexible, listen to the organization's needs and signs that there is a possibility to go higher
- Be Specific about what you need and where the money will be used (General v. Specific)
- It's okay to "float ideas" and make it a conversation
 - Provides organization ownership of the idea
- Customizing the Proposal (not all cookie cutter/be flexible)
- Before leaving nail down timing for the final decision and how to complete follow up

Follow Up!!!

- Send a thank you note within 24 hours (handwritten...)
- Summarize key points of the meeting
 - Restate the specific ask/needs
 - Include any information that was requested
- Keep following up till you receive an answer (today's world)

No.....

- It's not a personal rejection
- No may mean different things (understand and ask questions to understand which one)
 - Not now
 - Not for that amount
 - Not for this event
 - Changing priorities
 - Timing is wrong (budget is maxed)
- If No, be sure to ask why and what can do differently for the future
- Make sure to note tracking document with the “No” and the Why

Remember

- Always remain positive! The mission of the PTA should be your motivating factor.
- Don't get frustrated.
- Most people value that you “made an ask” rather than feel bothered by it
- Follow Up, follow up, follow up (typically it's not an organizations first priority)

Stewardship

DONOR STEWARDSHIP IDEAS BY GIVING LEVEL

NEW DONORS

- Create a welcome email series.
- Send regular updates about the impact of their gift.
- Invite them to follow your nonprofit on social media.
- Invite them to subscribe to your newsletter.

LOYAL DONORS

- Give them a personal thank-you call.
- Send regular program updates via email and direct mail.
- Invite donors to giving societies or membership programs.

MAJOR DONORS

- Send personalized thank-you notes from beneficiaries.
- Share plans for the next stages of major projects.
- Invite major donors to personal tours, lunches, or dinners.

	\$1-\$499	\$500-\$2499	\$2500+
Thank You Email	X	X	X
Thank You Direct Mail		X	X
Donor Appreciation Event	X	X	X
Committee Request			X



THANK YOU

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