

Working with (PTA)
Business Partners...

A Business Partner can be:

any company / business

(large or small, corporate or privately owned)

that makes an in-kind (goods or services) or monetary donation, or a business that sends volunteers to participate in events or activities, as a mentor or volunteer.

Is there already a PTA
"Business Partners" Board
Position or Committee?

Or, does your Board want
to institute one?
(Find the right person!)

Who is the "Business
Partners Liaison" designated
for your school?

Communicate & Coordinate
(as necessary)
with this person.

- Ask for a Procedure Book
- If there isn't one-
start one today!

Get Approval

- Confirm with PTA President / Exec. Committee - What can you "promise" or offer the businesses?
Ex. internet ad & / or web-link for a certain "donation", Name on a banner, logo in a newsletter,... Other opportunities your school offers?

Follow the rules!

- The main rule is: PTAs are not allowed to “endorse” a business.
- A PTA can Thank, show as sponsor, encourage an event, etc.

PTA Memberships vs. Donations

- **Confirm** (with your President & Treasurer or Exec. Board if necessary) -how your PTA handles Business Partner "Memberships" vs. donations.
- If possible- try to include a PTA membership for each monetary donation.*Remember Memberships must be in a person's name- not a business name.

Communication is vital!

Make sure:

- Everyone is aware that you are coordinating Business Partners specifically for the PTA; especially the front office personnel.
- They should have your email address and phone number in case a business approaches them.
- Ask office personnel for names of parents at the school who own businesses! Contact these parents.

Report your partnerships

- If you are a Board Member / Committee Chair- you should be reporting your Business Partner Activities at Board Meetings
- Remind the Board to contact you...
- Or- Ask other Board Members to let you know if they intend to "ask a Business for something" (donation, volunteer, etc.)

Try not to "double-dip"

- Make sure you don't have 2 or 3 Board members or teachers asking a business for various things.
- Ideally- business should have ONE or Two contacts at the school (two PTA Committee members contact info.)

**Be Professional:
Write, Receipt, Record,
Invite, Thank**

Create a Contract

- Create a printed "agreement" that the business can fill out.
- Include: the commitment, dates, and contact information (also name of Principal and PTA President)
- Ask Manager to sign at the bottom & attach their business card.

A "leave-behind"

- Always have something you can leave for the business owner / Manager...
i.e. a printed note, short letter, flyer, agreement, calendar, business card (PTA).
- Always ask for their card & make sure you have an email address.
- Ask "who should I speak with regarding...a partnership with a school?"

Write out your request:

Email is okay, but in-person is best.

- Use or create letterhead. Write a simple letter- describe your school, students, & families in a sentence or two.
- Explain your event or need (be sure to include the date).
- List benefits that you can offer the business
- Try to allow at least 2 weeks notice- if not a month or more, depending on the request.

School Pride

- Be creative- there are no rules (sort of)! Why not go to your local frame shop and ask them if they would display students' art work in their frames on a particular wall?
- Don't be afraid to ask! When you go into a small business- either in your neighborhood or near the school- mention your school & PTA (always be positive!) and ask if the business would like to be involved. Ask to set up a time to talk about opportunities to "partner".
- Many franchises provide materials & ideas re: working with schools... the managers just don't have the time to act on them. Make it easy for them to say "yes". Ask local businesses if they would offer families a discount when customers show their PTA Membership card, then promote the discount on your website & at meetings, on Membership flyers, etc.

mutually beneficial "partnership"

- Business want to know "what's in it for me?"
- Create a list of ways schools & business can benefit each other. *
- Incentive Coupons
- Announce to school staff, & teachers
- Take photos

Invite:

- Business Partner representatives can be: PTA Members, serve on PTA Boards, serve on SAC Boards, attend general PTA meetings, and why not invite them to your events- either to just be there and observe- or actively participate (table / booth / percentage of sales contribution / food donation / volunteer)
- Make it a partnership incentive for them to receive an updated calendar of events & be included in reminder emails.

Remember DCPS Volunteer Requirements

- If a business member is volunteering or mentoring: make sure you provide them with a DCPS Volunteer Application

Send "Thank You"

- Thank the business – many opportunities
- *Hand written thank you note
 - *email if appropriate or small donation
 - *thank you letter that can be used as a donation receipt
 - *framed thank you letter for significant contribution- that can be displayed at the business.
 - *plaque
 - *Business Partner of the Year recognition
- Check DCPS for Business Partner Award Opportunities

Keep records.

- Keep a current basic list of every business that contributes in some way & the value of that product or service- will be helpful to you in the future.
- Use it as a reference for next year or pass it on to the next Business Partners Coordinator.
- Provide Businesses with **receipts** for goods, services donations, etc. (include discounts)

Keep in touch!

- Don't work with your business only once.
- Don't work with your business only once. ;) Be loyal. Try to work with them throughout the year. (And check back next year)
- Communicate often. Tell your friends and PTA members to mention the school when they are at that business - and to thank them for the school support. (Be sure to tell the Principal & PTA Pres. about businesses that support your school.) Make it a lasting relationship. Keep your contact info. updated.

Good luck & go get 'em!

- "Working with Business Partners" Class taught by Kimberley Sheldon, DCC PTA Board 2013
- My contact info.: KSheldon.PTA@att.net
Feel free to email to "discuss" specific ideas or to have a hard-copy emailed.