



# GUIDE

Dear PTA Volunteer,

I offer you my sincere appreciation for your involvement in Leander ISD's PTAs and PTSAs. You are among our most dedicated advocates, providing additional resources and funding to support learning at your child's campus. Through your commitment and support, our students' educational experiences are further strengthened.

PTAs and PTSAs are separate organizations from the school district and responsible for the compliance of the organization. LISD collaborated with current PTA board members to develop this ***PTA/PTSA Guide***. The goal of the Guide is to provide easier training and transitioning throughout the years by summarizing district policies and procedures that your organization will find beneficial when working with your campus and LISD.

PTAs and PTSAs make LISD a great place for students to learn, and we are thankful to have you as partners.

Thank you for joining LISD in leading students to a bright future.

Sincerely,

Dan Troxell, Ph.D.  
Superintendent of Schools  
Leander ISD

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## I. Role of PTA/PTSA in Leander ISD

While Parent Teacher Association (PTA) and Parent Teacher Student Association (PTSA) are independent organizations, to work on Leander ISD (LISD) campuses and with the district, these organizations should operate and function in a way consistent with the district's philosophy and objectives, within adopted LISD board policies, and in accordance with PTA/PTSA regulations as applicable.

### ***Basic Regulations Include:***

- Be voluntary and provide unified support for student activities of the school.
- Encourage involvement by all parents of students enrolled in the campus.
- Use school facilities only with prior approval of the principal or designee.
- Submit the name, address, and telephone number of all current officers to the Director of Community Services, Shannon Lombardo at [shannon.lombardo@leanderisd.org](mailto:shannon.lombardo@leanderisd.org).
- Comply with administrative regulations and LISD board policies when donating money or gifts to the district.
- Comply with [Texas PTA](#) and [National PTA](#) guidelines, [district policies](#), and federal and state tax laws.
- Complete volunteer paperwork each year. All PTA/PTSA board members and volunteers are required to complete a new volunteer application each year [English](#) | [Español](#)
- Follow all district [trademarking](#) and [advertising guidelines](#).

## II. Volunteer Requirements & Expectations

### ***Who MUST complete a volunteer application?***

Any parent or non-parent volunteer who may be unaccompanied at any time by an LISD employee, while at an approved school event. This includes, but is not limited to: one-time special guests, vendors, performers, speakers, field-day volunteers, trip chaperones, Watch DOGS, mentors, LISD employees serving outside their role in the district and cafeteria, library and office help.

### ***Maintain Student Confidentiality***

- FERPA: Family Educational Rights & Privacy Act protects the privacy of student records. A student record is defined as any document that contains information directly related to a student (i.e. discipline reports, attendance records, test scores, written student statements, grades, transcripts, meeting notes, SpEd/504 records, etc.).
- Volunteers should understand that the academic and personal information they know about a student should be shared only with the appropriate teachers and school staff and should not be shared with neighbors, friends or other parents.
- Unless otherwise specified, all communication with parents should be handled by the teacher or school staff.



## **Parent Information and Communications**

- As an LISD volunteer it is important to ensure that any parent and/or student information (including email addresses) you may be given access to, will be treated respectfully and confidentially. Therefore, please keep in mind that parent's personal email addresses may only be used to communicate on approved topics such as: notification of classroom events, upcoming school functions, school volunteer opportunities, etc. Volunteers should not send unauthorized or non-school related emails to parents' personal email addresses. This includes emails of a personal nature, emails that advertise or market non-school related items or activities, and emails discussing confidential information about another student, parent, or staff member.
- Please note that LISD must comply with privacy laws by ensuring that all staff members and volunteers who have access to confidential information ONLY use that information as authorized. Unauthorized use of confidential information, including parents' personal email addresses, can result in removal from the volunteer program

### **Additional Volunteer Guidelines**

- See [LISD Volunteer Handbook](#) or [Manual para Voluntarios](#)

## **III. Business & Financial Interests**

### **District Employee Roles in PTA**

Staff are not allowed to hold any LISD school PTA/booster club officer position that has a financial capacity. "Financial capacity" shall include the President, Vice-President, Treasurer, Fund-raising chair, and any other Booster member that serves on a Financial Review committee, acts as a check signer for the club, or any other function that involves the receipt and distribution of money. ~ 2017-2018 Employee Handbook

- *Employee is defined as EVERY person employed by LISD (e.g. crossing guards, teachers, cafeteria workers, transportation, faculty and staff.)*
- *With roles clearly defined, staff can collect money as part of an PTA/Booster Club event (i.e., ticket taking, snack bar.) Staff can count LISD fundraising money, following good financial controls (at least 2 people should always count money.) Staff should also clearly separate their role as an LISD employee from the work they do as a parent volunteer.*
- *Substitute teachers can hold an officer position with financial capacity, but are required to disclose this in writing to the HR/ Sub office.*

### **Raising Funds**

It is the policy of the district that funds received from PTA/PTSA fundraising activities will be used to benefit the student and school.

Fundraising projects for parental groups shall be:

- For the educational benefit of the students, coordinated through the principal.
- For projects identified in the current approved budget and not for the sake of raising money.

- In connection with the established goals and philosophies of the district, campus PTA/PTSA as well as state and national PTA guidelines.
- The use of individual accounts for members of district groups or clubs is prohibited by the IRS.

\*Submit all fundraisers to the campus principal or designee for approval, including concessions, spirit items, tournaments, etc. The campus will forward them to the district for final approval.

### **IRS Regulations**

The Internal Revenue Service (IRS) prohibits tax-exempt organizations from **requiring** people to participate in fundraisers. Likewise, PTA/PTSAs may not require an amount be “donated” in lieu of participating in the fundraiser. People **may choose** whether or not to participate in a fundraiser and may choose whether or not to donate to the local PTA/PTSA. If a person decides not to participate, that person cannot be excluded from having the opportunity to benefit from the fundraiser and cannot be penalized in any way for choosing not to participate in the fundraiser. Furthermore, benefits given by a tax-exempt organization **cannot** be based on participation in a fundraiser or based on revenues raised individually. Therefore, regardless if a person participates in a fundraiser and regardless of the amount of revenue generated, that person cannot be denied the opportunity to receive an equal benefit.

### **Ways to Protect Your Organization against Embezzlement**

1. Money should never be kept at an officer’s home.
2. Two people should always count the money, and both should sign the receipt verifying the amount.
3. Two signatures should be required on all checks.
4. Have a member who does not have check-signing authority review the bank statement monthly before giving it to the treasurer. This person is looking for red flags including: checks showing up in non-sequential order, checks made out to cash, cash withdrawals, checks written out to non-approved vendors, checks written for non-approved expenses, and checks written out to individuals.
5. Never sign a blank check or a check made out to "cash."
6. Money should be deposited into the organization's bank account daily, even if a project/event is ongoing.
7. The treasurer should arrange to deposit the money in the bank as soon as possible, or at a minimum at the conclusion of the project/event.
8. Conduct an annual financial reconciliation of the books.

### **Campus/District Approval**

PTA/PTSA’s desiring to conduct a fundraising activity for a school program shall submit the completed [PTA/Booster Fundraising Permission Request Form](#) or the [Multiple Fundraiser Request Form](#) (also found in the resource section) to the principal or designee at least 10 business days prior to the event. Both the principal and the office of Business Services must approve the fundraiser.

## **Food Fundraisers**

- All food fundraisers must meet the [Texas Department of Agriculture Competitive Food](#) Nutritional Standards.
- Additional resources regarding competitive foods are located [here](#).
- Please check with your campus before committing to any sales of food or concessions.
- Ideas for [Healthy Fundraising](#)

## **Advertisement and Sponsorship**

The district manages all advertising at its facilities. PTA/PTSAs should not agree to any form of advertising at LISD facilities, including political campaign signage or materials.

### **So, what is the difference between a sponsorship and advertisement?**

According to the IRS, a qualified **sponsorship** is “any payment made by a person engaged in a trade or business for which the person will receive no substantial benefit other than the use or acknowledgement of the business name, logo, or product lines in connection with the organization’s activities.” For instance, if a nonprofit organization simply acknowledges the sponsor’s name, logo, and/or slogan, then the nonprofit organization would not have to pay tax on the income.

The IRS describes **advertising** as other activities that “promote” the sponsor’s products or services which include:

1. Messages containing qualitative or comparative language, price information or other indications of savings or value
2. Endorsements
3. Inducements to purchase sell or use the products or services.

Any and all advertising that promotes LISD schools, programs, campuses or other LISD assets must go through the School and Community Relations Department. If you are unsure whether or not your activity falls under ADVERTISING or SPONSORSHIPS, please contact School and Community Relations. If you are seeking SPONSORS, this might be considered a FUNDRAISER, in which case you need to submit the appropriate fundraising request forms to your campus principal or designee who will submit them to the district for final approval.

ANNUAL SPONSORSHIP PACKAGES should be reviewed by School and Community Relations prior to launching. Your fundraising request form submission will not be approved without this review.

## **Flyers**

District criteria state that 501(c) (3) tax-exempt organizations may submit community flyers via [Peachjar](#), which will be reviewed by our School and Community Relations Department. All such approved flyers are electronically sent out to parents and will be posted on the Peachjar page for each school the eflyer was posted with, until after the event/activity has passed. Paper flyers are prohibited from being physically distributed to campuses, including Wednesday Folders. A limited number of paper copies may be provided in the campus front office to aid in distribution (Contact SCR if you have questions or special circumstances with a flyer.)

## **District Trademarking and Licensing Agreement**

The district has entered into a trademarking licensing agreement regarding the use of its school names, logos, and other identifying marks **for our high school campuses**. The Trademark and Licensing Program helps protect from trademark infringement and from unlicensed competitors. When a licensing program is implemented, groups typically see their sales and their profits increase as demand for officially licensed school merchandise increases and the number of licensed vendors is limited.

- The program will require that all items sold by any non-district entity must include a hangtag/sticker that identifies the item as legitimate and an authorized user of LISD's identifying marks. This includes online stores that provide merchandizing options for spirit wear items. The district's program administrator is K12 Licensing (formerly LRG Prep.) More information on our T&L program will be posted and updated on the LISD website throughout the year.
- As an update to the T&L program for the 2017-2018 school year, LISD will continue to exempt booster and PTA sales from the revenue portion, but has also exempted any related hangtag/sticker fees that had been required in the past. **\*\*\* LISD Booster Clubs and PTA's do not have to seek permission to use licensed logos and marks for their fundraising merchandise.**

Training has been, and will continue to be, provided by the district to its booster and PTA groups as the program matures. Specific questions can be referred to the office of School/Community Relations.

## **Raffles/Bingo**

The school district is prohibited by Texas law from sponsoring or conducting any raffle or bingo game conducted for the purpose of raising money. However, there is a state Charitable Raffle Enabling Act (and also one for bingo) that allows organizations that support schools to conduct raffles under certain conditions. A raffle is any activity that involves awarding a prize — anything of value from a cake, to a car, to one or more people who have purchased a ticket.

The Charitable Raffle Enabling Act, effective January 1, 1990, permits “qualified organizations” to hold up to two raffles per calendar year, with certain specified restrictions.

**A “qualified organization” is a nonprofit organization that has existed for at least three preceding years, during which it has had a governing body duly elected by its members and is exempt from federal income tax under Section 501(c)(3), Internal Revenue Code; does not distribute any of its income to its members, officers or governing body; does not devote a substantial part of its activities to attempting to influence legislation; and does not participate in any political campaign.**

The language of the law is very technical. If you are considering holding a raffle to benefit an organization, you should check the [statutes](#) to be sure your group qualifies.

Any raffles or bingo games held on district property must be clearly advertised as PTA/PTSA event and not a Leander ISD program event; for example: Cox Elementary PTA and not just Cox Elementary.

While you may hold a casino night as a service to our students, you may not hold a casino night as a fundraiser. This is restricted by the State of Texas. [FAQ](#)

### **Logos and Other Campus Marks**

Leander ISD elementary and middle school campuses are not a part of the Trademark and Licensing program. However, names, logos and other campus “marks” are still considered one of our greatest assets. It is important to our branding of the district and our schools to maintain positive use of our marks across all of our supporting organizations. Therefore, the district encourages our boosters and PTAs to use approved school logos for their spirit merchandise and other school-related projects/items. School administration (principal or designee) should review and approve all uses of the logo prior to production and/or distribution to insure quality use and consistent branding for their school. (Example: If you are doing a spirit shirt for students or staff, use the approved school logo. Be sure your principal has approved the design and logo use PRIOR TO production.)

School logos are NOT approved to be used for PTA branding and communications without the organization’s name included. (For instance: Reed Elementary Road Runner logo could be used for the PTA website, but it needs to include CLEAR LANGUAGE that the website is Reed Elementary PTA.) If your PTA wants to create a separate logo for their organization, this is acceptable. But the school logo/mascot should be used for all SCHOOL spirit merchandise and other related projects that are supporting the school, students or staff where branding would be important.

For additional questions or clarifications on logo/mascot use, contact your Principal and/or SCR.

### **Donations**

Any expenditure for direct operating expenses — example: furniture or equipment — may be submitted to their campus. Checks must be made payable to Leander ISD.

### **Inventory**

Items purchased for or donated to the district/campus with PTA funds (such as furniture, equipment or technology) will become property of Leander ISD. Any device on campus (donated or district provided) is used to determine technology needs when there is an equipment refresh.

### **District Board Policy GE (Local)**

#### **PURCHASES FOR THE SCHOOL**

Before parent groups or other groups working with the school purchase equipment for the schools, including computer hardware and software, they shall notify the principal of their plans. In consultation with the superintendent or designee, the principal shall determine the type or brand of equipment to buy to ensure compatibility with current district equipment.

## **Business Summary**

- Complete the [PTA/Booster Fundraising Permission Form](#) and turn into campus principal or designee for approval at least 10 days before holding any fundraising activities.
- Do not require people to participate in a fundraising activity.
- Do not require a certain amount to be raised or sold per person.
- Leander ISD manages all advertising for its assets (facilities, programs, stadiums, etc.).
- All [community flyers](#) will be reviewed and distributed through our School/Community Relations Department utilizing an e-flyer resource, [Peachjar](#).
- Any high school retail items being sold by PTA/PTSA's must follow [trademarking guidelines and licensing rules](#) sited on the Leander ISD website.

## **IV. District Facilities & Services**

### ***Rentals***

LISD's mission is to provide facilities to accommodate our entire community - first to serve the students and youth by providing a quality educational environment and then to encourage and welcome our community to use the district facilities for educational, recreational, civic and cultural activities, when activities do not conflict with school use or with [LISD Board policy](#).

### **District Board Policy GE (Local)**

#### **RELATIONS WITH PARENT ORGANIZATIONS**

District-affiliated school-support or booster organizations shall organize and function in a way that is consistent with the district's philosophy and objectives, within adopted LISD board policies, in accordance with applicable UIL guidelines and financial and audit regulations (See also [CFD](#)).

#### **USE OF DISTRICT FACILITIES**

District-affiliated school-support or booster organizations may use district facilities with prior approval of the appropriate administrator. Other parent groups may use district facilities in accordance with LISD board policy [GKD](#).

### **Questions?**

**Michelle Wilson**, Facilities Coordinator

[michelle.wilson@leanderisd.org](mailto:michelle.wilson@leanderisd.org)

512-570-0604

**Ruth Hisle**, Facilities Specialist

[ruth.hisle@leanderisd.org](mailto:ruth.hisle@leanderisd.org)

512-570-0609

### ***Print Services***

The Document Production Center (DPC) is a district service center that provides high-quality printing and duplication services for our school district. These document services are also available for our parent and teacher organizations.

To verify an active account or set up a new one for your campus PTA/PTSA, contact **Colette Lau, LISD's Document Production Manager**, at [colette.lau@leanderisd.org](mailto:colette.lau@leanderisd.org). Once the account is set up, please communicate and pass along the campus username and log-in information each year as new board members fill positions.

A minimum of 48 hours is required for a basic black-and-white copy impression standard job. If multiple print jobs, notepads, business cards, booklets or posters are needed, please allow 4-5 business days for completion.

Completed jobs can be either picked up from the DPC (1900 Cougar Country | Cedar Park, 78613) or delivered to the campus front office.

Jobs will be billed on a monthly basis, and the invoice can be paid by check made payable to Leander ISD.

Additional [Training Resource](#)

### **Facilities Summary**

- In requesting the use of a small space/room for a local meeting on the campus, please contact the on-site campus administrative assistant for scheduling.
- If requesting a larger space or multiple rooms within a [school facility](#), the following must be complete:
  - A fundraising form for the event must be completed, approved by the campus principal (or designee), then submitted and approved through the Business Services Activity Fund/Fundraiser office at 512-570-0420
  - To reserve facilities, contact the campus administrative assistant.

## V. Notice of Non-Discrimination

*Leander Independent School District does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities and programs, including vocational programs in accordance with Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Education Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended.*

### Resources

[District Board Policy](#)  
[LISD PTA/Booster Fundraising Permission Request](#)  
[LISD Multiple Fundraiser Request Form](#)  
[Volunteer Handbook](#)  
[LISD Schools](#)

### Contact List

#### Volunteers

Shannon Lombardo  
Director, Community Relations  
[shannon.lombardo@leanderisd.org](mailto:shannon.lombardo@leanderisd.org) 512-570-0029

#### Advertising/Trademark & Licensing

Laura Weiss  
Marketing Specialist  
[laura.weiss@leanderisd.org](mailto:laura.weiss@leanderisd.org) 512-570-0030

#### Facilities Use

Michelle Wilson  
Facilities Coordinator  
[michelle.wilson@leanderisd.org](mailto:michelle.wilson@leanderisd.org) 512-570-0604

#### Fundraising

Activity Fund/Fundraiser  
512-570-0420

#### Nutrition Policy

[Texas Department of Agriculture](#) 512-463-7476