



# 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 renew their [LISD online volunteer application](#) each year.
- 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.

### ***Name Badges***

- Approved volunteers are required to wear their printed volunteer name badge – at all times while volunteering.
- Volunteers will immediately be recognized as a district-approved person whose specific purpose is to assist staff and students in an important role within the school's education team.
- To print your badge:
  1. **Log in** as a "Returning Volunteer" via the [LISD Volunteer Page](#).
  2. **Click "Print Badge"** to see a small image window of your tag. Click *Print Badge* to print. (*If no image appears on first try, close and repeat.*)
  3. **Bring your printed name badge** to your campus to receive a badge holder.

### ***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.

### ***Additional Volunteer Guidelines***

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

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

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

*Employees* are not allowed to hold any LISD school PTA/booster officer position that has a financial capacity. "Financial capacity" shall include President, Vice President, Treasurer, fundraising chair, check signer or any other function that involves the receipt and distribution of money. ~2016-17 LISD Employee Handbook pg. 49

1. *Employee* is defined as EVERY person employed by LISD (substitutes, crossing guards, teachers, cafeteria workers, transportation, faculty and staff.)
2. With roles clearly defined, employees are allowed to collect money as part of an LISD fundraiser (i.e., ticket taking, snack bar.) Employees are allowed to count LISD fundraising money, following good financial controls (at least 2 people should always count money.) Employees should also clearly separate their role as an LISD employee from the work they do as a parent volunteer.

### ***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 audit 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 [Non-Food Ways to Raise Funds](#)

## **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 district administration (either through Athletics or SCR) prior to launching.

## **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 LISD website. Paper flyers are prohibited from being physically distributed to campuses, including Wednesday Folders, unless approved as a special cause by the principal, but it is generally discouraged.

## **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 Licensing Program helps protect our booster/PTA groups 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.
- LISD exempted booster and PTA sales from the revenue portion, waiving the district's 75% share. Booster RETAIL sales only contribute to the legal cost of administering the program at a rate of 25% of 10% (\$0.25 on a \$10 item.)
  - Public Retail (Blue Tag) 10%
  - Student groups/ PTA/PTSA's (Yellow Tag) 25% of 10%
  - For official use only (Red Tags) No Charge

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](#)

### **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/PTSAs must follow [trademarking guidelines and licensing rules](#) sited on the Leander ISD website.
- Visit the [Sabre Trademark & Licensing](#) website for more information.

## **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 contact, [Tiffany Meehan](mailto:tiffany.meehan@leanderisd.org) at [tiffany.meehan@leanderisd.org](mailto:tiffany.meehan@leanderisd.org) or 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](#) GE (Local)  
[LISD PTA/Booster Fundraising Permission Request](#)  
[LISD Multiple Fundraiser Request Form](#)  
[Volunteer Handbook](#)  
[LISD Schools](#)

### Contact List

#### Volunteers

Shannon Lombardo  
Director of 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

Tiffany Meehan  
Activity Fund/Fundraiser  
[tiffany.meehan@leanderisd.org](mailto:tiffany.meehan@leanderisd.org) 512-570-0420

#### Nutrition Policy

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