



GUIDE



Superintendent's Message

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 compliance with state and national guidelines. LISD collaborated with current PTA board members to develop this helpful *PTA/PTSA Guide*. The goal of the guide is to facilitate training and transitioning by summarizing district policies and procedures. It is my hope that your organization will find it especially 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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Highlighted Text

New language added or change to a policy

I. Role of PTA/PTSA in Leander ISD

While the 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 Relations, Shannon Lombardo at 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 a NEW [online volunteer application](#) each year. (All PTA/PTSA board members and volunteers)
- Follow all district [trademark/licensing](#) 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 certify that there are no legal restrictions to access their child, or regarding any student or employee at Leander ISD. If any legal restriction is put in place, the volunteer understands they must notify the principal at their assigned campus and Shannon Lombardo, LISD Director of Community Relations.
- 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](#)

III. Business & Financial Interests

District Employee Roles in PTA

Employees 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, Fundraising 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. ~ [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.) Employees should also clearly separate their role as an LISD employee from the work they do as a parent volunteer. **Employees should not take full control, deposit or take off premise PTA/Booster club event funds.**
- Substitute teachers can hold an officer position with financial capacity but are required to disclose this in writing to the HR/ Sub office.

Fundraising Activities

It is the policy of the district that funds received from PTA/PTSA fundraising activities* is used to benefit the student and school in an appropriate way.

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.

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 **4 weeks** prior to the event. Both the principal and the office of Financial Services must approve the fundraiser.

- Submit all fundraisers to **the campus** for approval, including but not limited to concessions, spirit items, tournaments, etc. **The campus** will forward them to the district for review and approval. PTAs should contact their campus for approval status on fundraising requests.
- Sponsorship Packages with benefits to the sponsor are considered fundraisers. Be sure your sponsorship package has been reviewed and approved by your principal, as well as by School Community Relations, prior to submitting your fundraising request form to avoid any conflicts with district policy of other advertising guidelines. Sponsorship packages should be reviewed each year.
- A "fundraiser" is any activity that RAISES FUNDS. When in doubt, please contact your campus PRIOR TO implementing an activity. (This includes ONLINE spirit sales or other online revenue generating activities, including crowd funding sources like GoFundMe.)

IRS Regulations

The Internal Revenue Service (IRS) prohibits tax-exempt organizations from **requiring** people to participate in fundraisers. Likewise, PTA/PTSA's may not require an amount be "donated" in lieu of participating in the fundraiser. People **may choose** whether to participate in a fundraiser and may choose whether 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 end of the project/event.
8. Conduct an annual financial reconciliation of the books.

Food Fundraisers and Restaurant “Spirit Nights”

- 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](#)
- Restaurants/businesses that include promotion of alcohol in their name and/or logo should alter their name and/or logo to adhere to Board Policy on Advertising. (ex: BJ’s Brewhouse needs to provide a logo that does not include “brewhouse” in the logo nor in other promotional language.)

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.

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 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.

Sponsorship Banners

District policy and advertising guidelines do not permit the display of sponsorship banners or other advertising signage (including other printed materials such as posters, flyers, banners, etc.) within campus hallways or other student areas without prior authorization from district administration. Advertising banners are only authorized in certain locations as coordinated through School Community Relations. (Ex: Sponsorship banners with business names and logos are not allowed to be hung up on district owned property without authorization, to include hallways, classrooms, gyms, front offices and other areas.)

Flyers

District criteria state that 501(c)(3) tax-exempt organizations may submit flyers via [Peachjar](#), which will be reviewed by our School and Community Relations Department.

- All such approved flyers are reviewed for electronic distribution through the district's agreement with Peachjar. 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.)

Tips when creating flyers, sponsorship packages or other solicitation letters, include:

- WHO is coordinating the event, and BE SPECIFIC
- WHAT is the event for (ex: is hosting a summer dance clinic for dancers' grades K-6)
- WHEN is the event (ex: Saturday, July 31)
- WHERE is the event (at Cedar Park High School, 2150 Cypress Creek Road)
- WHY is the event being held (ex: to raise funds for 2018-2019 dance competition fees)
- A contact phone number and/or email address for interested participants should they have questions.
- A disclaimer at the bottom that says your eflyer has been reviewed and approved for distribution. (This is "best practice" whether you distribute via Peachjar or not.)
- A working website address for the PTA that might include additional information if someone is looking for more details or to verify legitimacy of the program.

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.)
- Leander ISD exempted booster and PTA organization from licensing fees

For details, please refer to the LISD [Trademark/Licensing](#)

Raffles/Bingo

The school district is prohibited by Texas law from sponsoring or conducting any raffle or bingo game conducted for raising money. However, there is a state Charitable Raffle Enabling Act (and 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.

Per GKB local board policy, no raffles, bingo, or other games of chance may be advertised, held on district property, or tickets sold on district property. Therefore, a raffle cannot be promoted with district resources (i.e. no posters/flyers on campuses, on district owed websites, nor via Peachjar.)

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 — must be submitted to the Financial Services Department with the proper forms. 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. When there is a technology equipment refresh in the District, all devices (donated and/or district provided) are considered when determining campus technology needs.

District Board Policy [GE \(LOCAL\)](#)

Before engaging in fundraising or soliciting gifts, an organization or group shall notify the principal or other appropriate administrator identified in administrative regulations. [See [CDC\(LOCAL\)](#) for District acceptance of gifts and solicitations]

Business Summary

- Complete the [PTA/Booster Fundraising Permission Form](#) and turn into campus principal or designee for approval at least 4 weeks 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.

IV. District Facilities & Services

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 organizations and booster organizations, and other parent groups, shall organize, fundraise or solicit donations, and function in a way that is consistent with the District's philosophy and objectives, Board policies, District administrative regulations, applicable UIL or other governing association guidelines, and financial and audit regulations.

Before engaging in fundraising or soliciting gifts, an organization or group shall notify the principal or other appropriate administrator identified in administrative regulations. [See also [CDC](#) for District acceptance of gifts and solicitations]

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](#).

Rentals: Fundraisers Using District Facilities/Property

When a district facility/property is used for a fundraiser on a non-school day or after hours, the organization will be invoiced for custodial costs. If a third-party vendor is used for fundraising, facility use fees and personnel costs will be incurred. More information on [Facility Rentals](#)

Michelle Wilson, Facilities Coordinator - michelle.wilson@leanderisd.org 512-570-0604

Ruth Hisle, Facilities Specialist - ruth.hisle@leanderisd.org 512-570-0609

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 Business Services, Rhonda Fuston at 512-570-0069
 - To reserve facilities, contact the campus administrative assistant.

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. 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 monthly, and the invoice can be paid by check made payable to Leander ISD.

Additional [Training Resource](#)

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.

VI. 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 512-570-0029

Advertising/Trademark & Licensing

Laura Weiss
Marketing Specialist
laura.weiss@leanderisd.org 512-570-0030

Facilities Use

Michelle Wilson
Facilities Coordinator
michelle.wilson@leanderisd.org 512-570-0604

Fundraising

Rhonda Fuston
Financial Services
rhonda.fuston@leanderisd.org 512-570-0069

Nutrition Policy

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