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| <b>PSD<br/>ASB<br/>PROCEDURES<br/>MANUAL</b> | <b>OUTSIDE SCHOOL SUPPORT<br/>PTA/PTSA/PTO ACTIVITES</b> | <b>REVISED<br/>3/09</b> |
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## **INTRODUCTION**

Parent support groups such as PTA/PTSA and PTO, in cooperation with the school administrative staff, are very helpful, needed, and can be an enriching component to the school climate. Encouragement to involve parents comes from the local school board and the superintendent. Their volunteer involvement provides added resources for both students and staff.

PTA and PTSA are proprietary names and are registered service marks. (This is the same legal status as a trademark, but is the designation used for services). Groups may only use “PTA/PTSA” if they are registered with the National Congress of Parents and Teachers and the Washington State PTA. PTOs are not part of the National Congress of Parents and Teachers or the Washington State PTA.

A PTA or PTO is not a “school-related organization.” Each PTA and PTO is a local, self-governing, nonprofit (and usually, tax-exempt) membership association with their own set of bylaws, elected officers and membership. PTAs and PTOs pass an annual budget and are subject to the Articles of Incorporation and the Bylaws, but PTAs are also subject to the Washington State PTA to which they pay membership dues. PTOs also have membership dues, but usually they remain at the local PTO level. PTAs and PTOs are encouraged to obtain 501 (C) 3 status and must carry liability insurance.

Washington State PTA offers assistance to local units. Publications such as *Washington State PTA Money Matters* and *PTA and the Law* outline the requirements for the proper handling of PTA funds and how PTAs operate. PTOs can also benefit from these publications as they help direct volunteer organizations with state and federal rules which affect private, nonprofit, tax-exempt organizations.

Staff participation, cooperation and support of PTAs and PTOs are encouraged. However, employees are discouraged from holding an official position or having signature authority with a PTA or PTO due to potential conflicts of interest. (RCW 42.23)

If the PTA or PTO holds a fundraising activity at a school, on or off school district property, or involving students, **and** is conducted at the **direction or under the supervision of the PTA or PTO**, the money belongs to the PTA or PTO. See the Washington State PTA publication, *PTA and the Law*, for further clarification.

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## **PROCEDURES**

In order for these funds to belong to the PTA or PTO, **the entire activity must have been conducted at the direction and/or supervision of the PTA or PTO.** This means that the PTA or PTO must be clearly in charge of the activity, including advertising the activity.

To determine if the PTA or PTO directed or supervised the activity, **all** of the following criteria are used:

1. If there was a contract involved, **the PTA or PTO must have signed the contract in accordance with their bylaws.** If someone else (i.e., a school district representative) signed the contract, then the activity is not a PTA or PTO activity.
2. The PTA or PTO must have been involved in the creation and planning of the activity, as well as the implementation, operation and management of the activity. It must also:
  - provide the majority of manpower for the activity through its volunteer members;
  - have a properly structured committee for the activity; and
  - provide insurance for the activity.
3. School district employees should be involved only on their own personal (non staff) time unless the employee's job description requires them to serve in an advisory capacity.
4. The activity must follow PTA or PTO guidelines which may include:
  - approval by the PTA or PTO membership or Executive board; and
  - being a part of their budget.
5. A facility use permit may be required by the school district, in accordance with district policy.
6. Moneys collected from the fundraising activity are not to be counted by school district employees, held in a district facility or school safe, or be deposited into a district bank account. Instead, money is to be counted by the designated PTA/PTO representative in accordance with its rules. It must be deposited into a separate bank account which is operated solely by the PTA or PTO.
7. When students are asked to participate in a PTA or PTO fundraiser, it must be clearly advertised that the activity is a PTA or PTO event. Students are discouraged from collecting money for the PTA or PTO. A contract between the PTA or PTO and the ASB is advisable when students are asked to work a PTA or PTO event, because it clearly defines the responsibility and distribution of the funds.
8. By Washington State PTA rules, local PTA chapters are not allowed to sponsor student athletic contests.

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**If the activity does not meet the above criteria, then it is not a PTA or PTO activity and the money raised at the activity does not belong to the PTA or the PTO.**

**Donations:**

PTAs and PTOs making a donation to a school should contact the building Principal to determine district policies and guidelines governing donations. Per School Board Policy, donations exceeding \$5,000 must be approved by the board.

**Use of District Copiers:**

**The use of district copiers by a PTA or PTO organization shall be reimbursed back to the District at the rate posted on the annual fee schedule (per copy charge).**

**Non Profit Bulk Mailings:**

Usually PTA local units and councils can qualify for a special, reduced non-profit bulk mailing permit. They would do this with the post office where their mailings will be made. The special bulk rate authorization cannot be rented, delegated or loaned to another organization. The special permit indicia is stamped in the upper right hand corner.

The school district can also have a special non-profit bulk mailing permit that is used by the local schools and Administrative departments, and this may not be loaned to the PTA or any other organization. Newsletters to parents/guardians, if paid by either the school district or the PTA, may include PTA or PTO information.

If a PTA council holds a non-profit bulk mailing permit, in addition to the district holding a non-profit bulk mailing permit, the school newsletter may include the dues membership envelope, but they cannot include commercial advertising.

For further information about postal regulations, please contact the U.S. Postal Service. They may be contacted at [www.usps.com](http://www.usps.com).