Livingtree – Principal Quick Start Guide

Crowdfunding is the practice of funding a project or idea by raising small amounts of money from a large number of people, typically via the Internet. The following guidelines relate to Austin ISD campuses and the utilization of crowdfunding services to obtain resources.

**WHO CAN CREATE FUNDRAISING CAMPAIGNS?**

**Schools**
Every Austin ISD school has its own Livingtree account for crowdfunding, communications, volunteer sign up and events. The principal at each school is the owner of the account and has full responsibility for the crowdfunding campaigns. Austin ISD teachers have login access to their campus page and can create individual fundraising campaigns. The principal may add additional authorized users, including bookkeepers and teacher sponsors for school clubs. All school-based crowdfunding campaigns must first be approved by the school principal before the campaign is published on the Livingtree site.

**PTAs**
Because PTAs and schools often work closely on crowdfunding efforts, the district has authorized one PTA account per school. PTAs have their own login credentials, can create crowdfunding campaigns and events, manage donor lists, create volunteer opportunities and market fundraising campaigns. Funds raised are directly deposited into the PTA’s PayPal account. All school-based crowdfunding campaigns must first be approved by the school principal before the campaign is published on the Livingtree site.

**APPROVAL FLOW**

1. **Principal**
2. **Bookkeepers**
3. **PTAs**
4. **Teacher**
5. **Club Representative**
APPROVAL PROCESS OVERVIEW

School Based Crowdfunding Campaigns
Campaigns follow a two-step approval process:
1. Bookkeeper review – Once a teacher or club representative creates a campaign, the bookkeeper assigns the appropriate accounting code. The bookkeeper then notifies the principal that the campaign is ready for his/her approval.
2. School principal review – Once the school principal approves the campaign, the campaign will be published on the school’s Livingtree page.

PTA Crowdfunding Campaigns
Campaigns follow a one-step approval process:
1. School principal review – PTA campaigns will automatically be sent to the school principal for approval before they are published on the school’s Livingtree page.

APPROVAL STEPS

As the principal of your school, you are the manager of your school’s Livingtree account. All crowdfunding campaigns made by your staff or by your school’s PTA will be reviewed by you.

As the reviewer, you may take the following actions:
1. Edit – If you decide the campaign needs changes, select the edit button. Your suggestions will be noted in the chat notes and will be sent to the campaign creator. Once the campaign creator makes the suggested edits, their campaign will automatically be re-submitted for your review.
2. Reject – Permanently reject the campaign if you do not want the campaign to be published.
3. Approve – Approve the campaign if it needs no edits, meets your campus’ objectives and goals and has your approval. Once it is approved, the campaign will be published on Livingtree’s site.

PAYMENT PROCESS

District Process
The process for receiving donations was created in conjunction with the Austin ISD Finance Department. All Livingtree donations will be processed monthly through Austin ISD’s PayPal account and are associated with a general campus account. Once the money is received in AISD Treasury, funds are transferred to the corresponding general campus account with a note reminding the bookkeeper of the accounting code information (i.e. 3rd Grade Activity Fund). Tax receipts acknowledging the donation will automatically be sent to donors via email.

PTA Process
Donations made to PTA-sponsored campaigns will be processed through the individual PTA’s PayPal account.
GETTING STARTED

Crowdfunding Video
Several resources exist on the Livingtree website to help schools create and implement successful fundraising campaigns. The following video provides a general overview of crowdfunding using Livingtree: https://intercom.help/livingtree/en/articles/2054929-video-campaign-creation-walkthrough

STEP-BY-STEP INSTRUCTIONS

Log into Livingtree
- Go to learn.livingtree.com and click on the Log In button at the top of the page. Enter your email address and password.
- If this is your first time using Livingtree, click on Forgot Password. You will receive an email to your Austin ISD email address with a link to reset your password.
- If your Austin ISD email address is not registered with Livingtree, please contact Ryan O’Donnell at ryan.odonnell@austinisd.org to start a new account. **Do not create your own account!**

View Campaigns Waiting for Review
When campaigns are submitted for review, you will see a message at the top of every page of your account that says Pending Actions for Your Review, Click Here. You will also receive an email alerting you of the status of pending campaigns. Select Click Here to view all the campaigns that have been submitted for review.

Click on the campaign name to be taken directly to a draft of the campaign. To take action, click the green chat bubble to open a window. You may leave notes and either approve or reject the campaign. All notes pertaining to the campaign will be saved for review.
If the campaign is approved by the principal, it will automatically be published on the campus’ Livingtree site.

**VIEW REPORTS**

View reports in Livingtree
Click on Fundraising in the left-hand column and click on Reporting in the top right.

You will now be directed to the crowdfunding reporting section.
The main page will display the total number of payments, total donation amount, average donation amount, total number of campaigns, total number of donors, and total percentage of goal amount raised, along with a list of all of donations.

Use the dropdown menu to customize the crowdfunding report. Users can create reports based on campaign name, dues, events, or time frame.

All Livingtree reports can be exported as either as an Excel file or as a PDF by using the export buttons at the top of the chart. Use the Excel file to sort the list as necessary.

Need help? Email support@livingtree.com or call (512) 957-2313 (extension #2) for additional support using the Livingtree platform.