

UNIVERSITY PLACE

School District

PTSA & Booster Club Handbook

A reference guide for all UPSD parent clubs'
board of directors



Prepared by the UPSD Business Office and
Athletic Director

University Place School District ADMINISTRATIVE PROCEDURE

School Support Organizations (PTSA, Booster Clubs, etc.)

Parent involvement is of the utmost importance in student success and participation in school support organizations is one vehicle for parent involvement. The term school support organization refers to parent-staff-student associations including but not limited to Parent Teacher Student Associations (PTSAs) and/or Booster Groups. The term school support organization does not refer to loosely formed groups of parents or individuals that informally support classroom or student activities. School support organizations are not governed by the district; however, they must follow certain board policies and administrative procedures, especially when fundraising, renting district facilities, giving donations, and involving students. Staff participation, cooperation, and support are encouraged in such recognized organizations.

PTSA Groups

An official PTSA group is a local, self-governing, non-profit (and usually tax exempt) membership association with its own set of bylaws, elected officers and membership. Principals shall maintain a current list of contact information for officers of PTSA groups.

Booster Groups

Booster groups are separate entities from the school and school district. They generally support and supplement the various academic, athletic, and activities programs offered in our schools. The booster club purpose is to enhance the program designed by the advisor or coach. Booster groups do not dictate curriculum, program structure, or personnel. The principal and advisor have final authority to determine the activities and actions of the booster group. Principals shall maintain a list of all booster groups operating at their school, including the school advisor for each group and current contact information for officers.

Employee Participation in Booster Groups

- Employees are all people who receive a paycheck from the University Place School District.
- Employees should only be involved on their personal (non-staff) time unless the employees' job responsibilities require service in an advisory capacity.
- Employees can be members, but not officers, in a booster club. They can not have check signing authority.
- Employees must not handle or secure funds generated by booster club fundraisers.
 - For example, employees can help with fundraisers, but should not collect money.
- Employees are not allowed to receive compensation directly from booster organizations.

Facility Use

School support organizations need principal (or designee) permission to meet on school premises during school hours. For school support organization activities before and after school, facilities, including the kitchens and athletic fields, are accessed through the district Facilities Use process.

Use of district equipment and/or materials (copiers, PE equipment, computers, paper, etc.) must be approved by the school principals. All costs must be reimbursed by the organization.

Fundraising

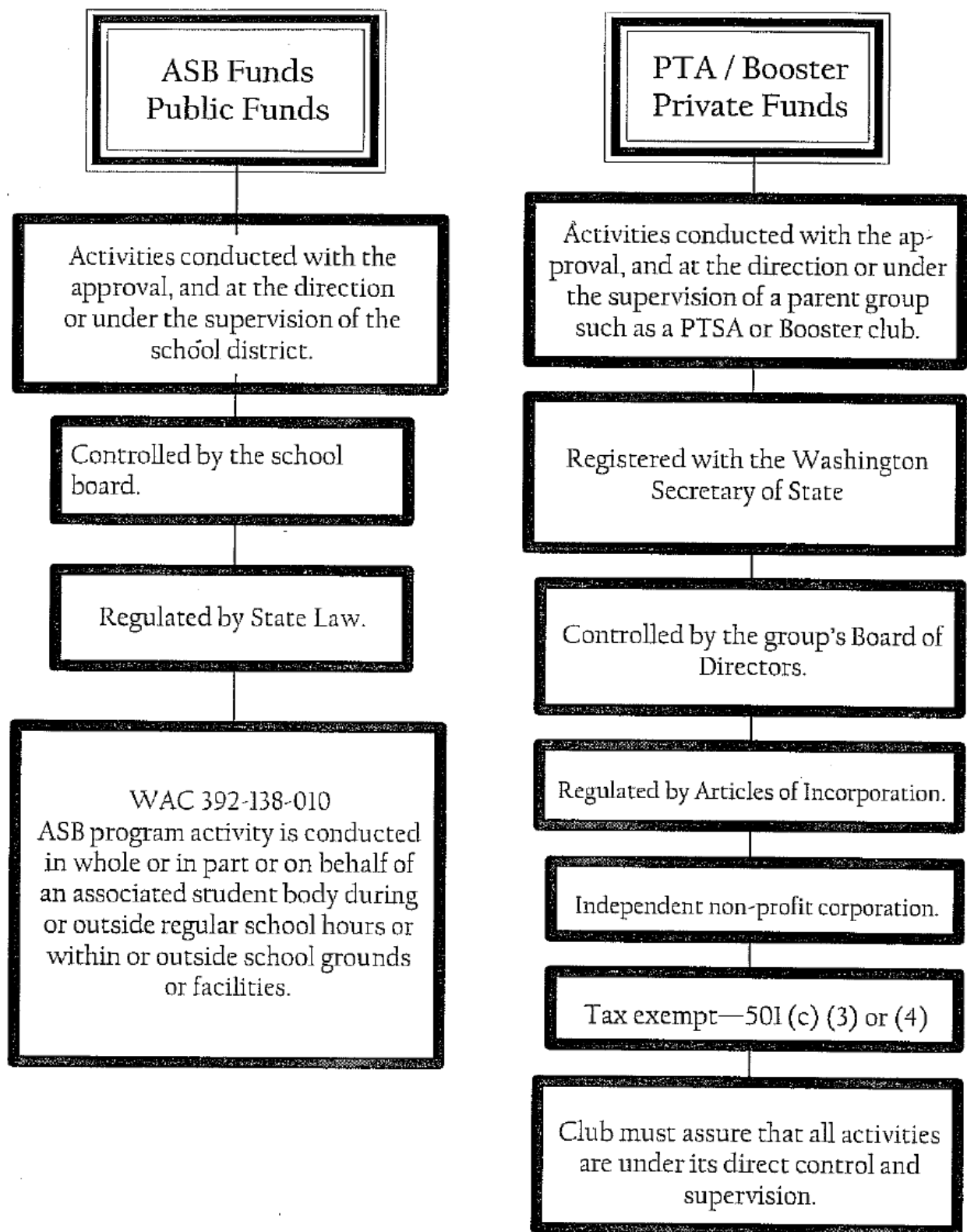
School support organizations can conduct fundraising activities to enhance the activity they are supporting and are subject to the following guidelines:

- Principals should approve in advance any fundraising activity conducted on their campus.
- Staff may not plan, manage, or operate fundraisers.
- Money shall not be stored on school property.
- Fundraiser events must be clearly advertised as the school support organization's activities.
- Fundraising activities must be kept apart and clearly designated from school fundraising activities.
- Donations from fundraising activities can be accepted by the school and should be used for their intended purpose.
- If students participate in the fundraising activity, it must be voluntary, infrequent, and not during instructional time. Students should not organize, manage, or operate a school support organization fundraising activity. Students should not wear school uniforms to fundraising activities.

Separate Entity

- School support organizations must be registered with the Secretary of State and obtain their own tax identification number from the Internal Revenue Service. Annually provide the following to the school principal or office coordinator:
 - Articles of Incorporation from Secretary of State and proof of current registration
 - Copy of IRS non-profit corporation registration
 - Insurance Certificate
 - List of current officers
 - Facilities use agreement if using school facilities
 - Proof of health cards (if food is sold)
- School support organizations checks and bank accounts must clearly identify them as a separate entity from the school district.
- School support organizations may not use the district tax identification number.
- School support organizations cannot use the school address for correspondence or deliveries. A separate address and phone number are necessary for all activities.

ASB vs. PTA/BOOSTER



Annually:

Provide the School Office Coordinator:

- Articles of Incorporation from Secretary of State and proof of current registration
- Copy of IRS non-profit corporation registration
- Insurance Certificate
- List of current officers
- Facilities use agreement if using school facilities
- Proof of health cards (if food is sold)

Is it ASB or PTSA/Booster?

Money is deposited in the ASB account if:

- Students or staff handles cash receipting.
- The school district or school's name is used alone.
- The fund-raising is conducted on or off school property. The school stores & inventories items for resale.
- The fund-raising is done with the approval of the school board or their designees.
- School district personnel are involved during staff time.
- Money is to be used for Cultural, Athletic, Recreational, or Social purposes only (non-curricular).
- It's done with approval of school board or designees.

Parent group (PTSA, Booster, etc.) activities involving money must:

- Have their club name prominently printed on all promotional materials.
- Be planned, managed and operated solely by members of the parent group and with group funds.
- Not keep money on school grounds, not allow school staff to receive money, district employees are not signers on booster club checking accounts, not keep in school safe or bank account.
- Can not use the school address for correspondence or deliveries.
- Use funds to promote the health, welfare, safety and education of children and youth.
- Have parent group board members sign all contracts &/or vendor agreements.

Facilities and Equipment Use: Parent groups must have a facilities use form to use district facilities. Use of the district equipment, including copiers, must be coordinated with school personnel and the district reimbursed for any costs.

Fundraising



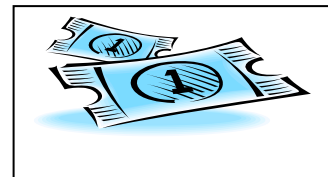
- Gambling activities such as Bingo, raffles, carnivals, etc. have very specific laws and limits. See section “On Gambling”.
- Best practices recommend money be deposited DAILY into parent-group’s bank account.
- Raffle tickets may be sold by students IF raffle is supervised and managed by an adult. Only adults may purchase tickets.
- No fundraiser may compete with district food service programs. *School stores located in/near cafeterias may not sell food items during meal periods.*
- Coordinate fundraiser schedules with your school principal. Use the district calendar to avoid conflicts.
- Contributions (both money and goods) made directly to the school must be submitted with a **UPSD Monetary Donation/ Hold Harmless Form** found on the district website under District Services/Business Services/Forms.
- Coordinate all fundraisers with your principal when students are involved or UPSD facilities are being used. Possible types of fundraiser—not all inclusive:
 - Sales of goods
 - Car washes, rummage sales, pancake breakfasts, spaghetti dinners (must meet Pierce County Health Department requirements)
 - Carnivals when organized and supervised by school or recognized parent group.
 - Skating and bowling parties w/adequate supervision and liability protection
 - Band-a-thons, bike-a-thons, and walk-a-thons
 - Sports games if liability insurance for both participants and facilities is included in contract
 - Talent, variety, musical, and drama productions
 - Donations
 - Check district Activity Matrix for allowable activities

On Gambling . . For your information

- Keep the school principal aware of all fundraising activities. Parent groups that are incorporated as a non-profit organization may host gambling activities without a license provided they:
 1. Have been organized and operating for at least 12 months before activity; and
 2. Can prove the organization has made progress toward their stated purpose during the 12 months before the activity; and
 3. Have at least fifteen voting members who elect the governing body.
- Each group may conduct no more than two gambling events each calendar year (Jan.- Dec.)
- Each event may last no more than 12 consecutive days, except for raffles which may last longer.
- Only group members who are not paid for their services, may manage or operate the activities.

- Gross revenue may not exceed \$5,000 in any calendar year. Your local police department must receive notice at least 5 days prior to the activity.
- Regarding Raffles:
 1. Tickets must all be sold for the same price (\$100 max per ticket).
 2. Tickets must be consecutively numbered with a duplicate stub.
 3. Tickets must be sold to persons 18 years old or older.
 4. Tickets must have clearly stated how much it costs, the date, time and location of the drawing, the name of the sponsor, a description of prizes, and whether ticket purchaser must be present to win.
 5. Retain all financial records regarding ticket sales and bank statements for at least three years.
 6. Have winning tickets drawn randomly from a receptacle to allow equal chance of winning.
 7. **Not award firearms. Only award alcohol at members-only raffles with permit from Liquor Control Board**

Go to "PTA & the Law" or <http://www.wsqc.wa.gov> for more information



Other Key Items

Contracts

- Any time someone is paid for service, you should have a Personal Services Contract signed. See UPSD or WA State PTA website for sample contracts.
- All contracts should be signed by a member of the Board of Directors, not a UPSD employee.
- UPSD employees **cannot** be paid by Booster Clubs. They MUST be paid through the district.
- Facility Use Forms must be completed for any group using a district building for an activity/event/fundraiser.
- A valid Certificate of Insurance and Additional Insured document is required prior to activity date for any business coming to work with students on site (i.e. a DJ or Chess4Life) or where the students go off-site.

Recommended Business Practices (State Auditor could ask for these).

- All disbursements of money need evidence of prior approval by at least two signatures in writing.
- Keep all source documents as back-up.
- Explain in writing all voids and refunds and when receipts don't match deposit.
- Never use White Out, pencil or scribble out anything. Periodically record inventory on stored items and equipment. Keep Bylaws, Constitution and Standing Rules current. See Record Retention Schedule in "PTA & The Law" document.

Risk Factors

- Food Handler Cards are required for all permanent locations (like concession stands) where unpackaged food is handled. For temporary locations (like fundraisers or special events) at least one person needs a card.
- Federal Law prohibits 501(c)3 non-profit groups from engaging in political candidate campaigning.
- Parent groups are not to sponsor/coordinate field trips. Donate funds to school with a designation of field trip use only.
- High Risk activities are discouraged and must be coordinated with your principal. Please review the Activity Matrix on the web: www.upsd.wednet.edu see District Services, Business Services, Activity Matrix

Resources...

Guidestar

Offers general, in-depth, and customized data services on almost 1 million U.S. nonprofits.

<http://www.guidestar.org/> or (800) 421-8656

Independent Sector

A coalition of leading non-profits, foundations, and corporations strengthening not-for-profit initiative, philanthropy, and citizen action.

<http://www.independentsector.org> or (202) 467-6100

Internal Revenue Service

See form 1023 for application and 990 to report income/expenses. <http://www.irs.gov/charities> or (253) 428-3518

Parent Booster USA

Dedicated to providing booster clubs throughout the USA with legal, tax and other non-profit assistance.

<http://www.parentbooster.org/> or (800)353-5616

Secretary of State

Washington State laws (WAC/RCWs) regarding charitable solicitation and trusts.

<http://www.secstate.wa.gov/charities/> or (360) 902-4151

Washington Interscholastic Activities Association

Check for athletic and activities rules.

<http://www.wiaa.com> or (866) 545-8638

Washington State PTSA

We are people of all ages improving the education, safety, and health of children. Join us in building a better world for children.

<http://www.wastatePTSA.org/> or (253) 565-2153

University Place School District Business Services Office

3717 Grandview Dr. W.,
University Place, WA 98467 (253)566-5600