

Socorro Independent School District  
Fundraising Protocol for  
Parent Organizations



SOCORRO INDEPENDENT SCHOOL DISTRICT  
Parent **Volunteer** Program  
*Strengthening student success through volunteerism*

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# Volunteer Program Web Page

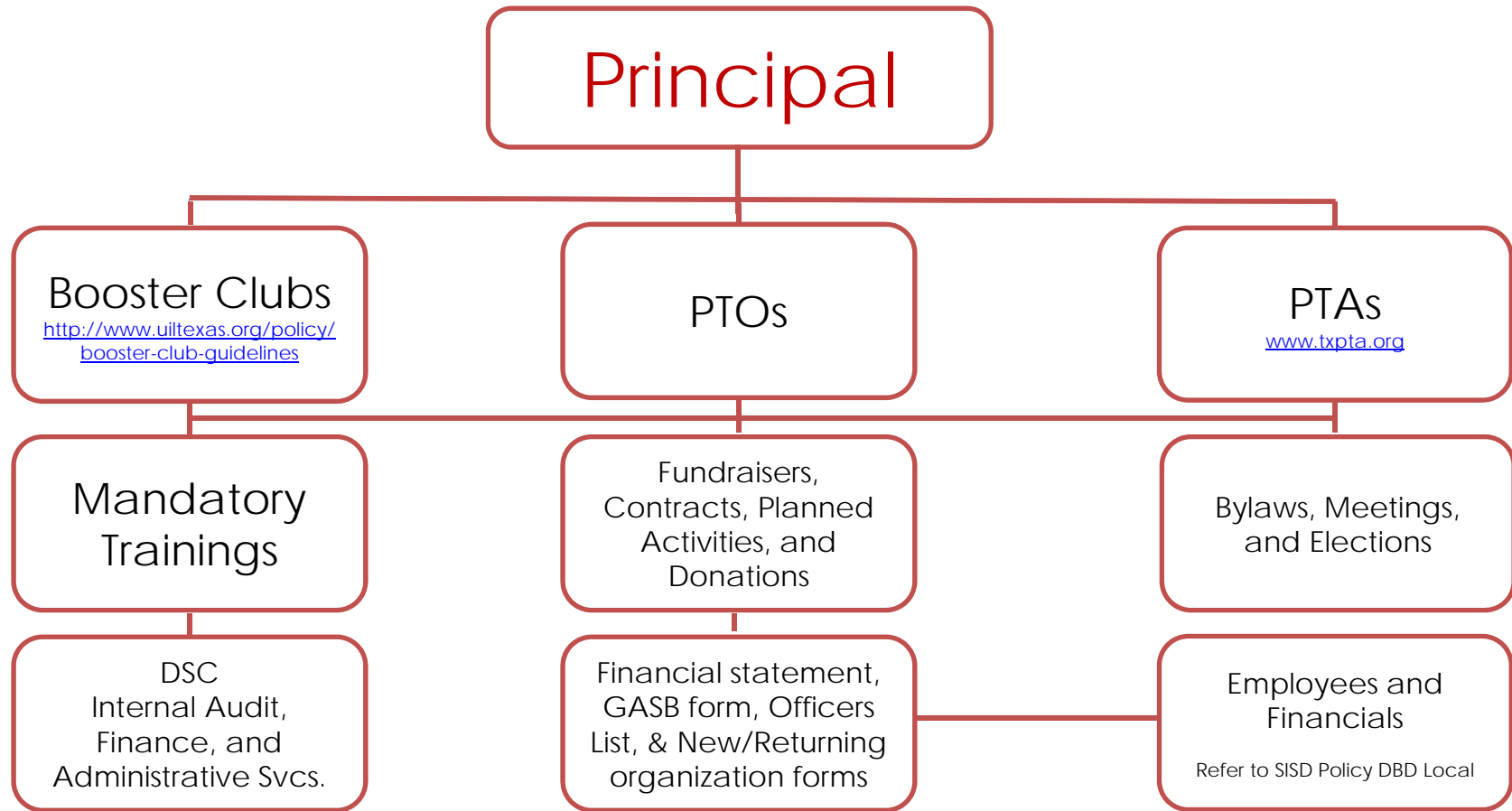
- [www.sisd.net](http://www.sisd.net)
  - Click "Departments"
  - Click "Volunteer Program"
  - Click "Fundraising Protocol for Parent Organizations"



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# Fundraising Protocol & Parent Organizations



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# Principals Duties

- The District's designee for overseeing the activities of Parent Organizations and Booster Clubs is the Principal of the campus where the organization functions
- The Principal shall:
  - Approve the formation of any such organization
  - Receive a copy of the organizing documents and bylaws
  - Ensure that an organization's sole function is to support the educational activities of the designated program
  - Approve fundraising activities and all activities of the organization
  - Be a voting member of the organization
  - Have the authority to discontinue the association of any school program that has been judged to be disruptive to the educational activities or goals of the program



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# Reports to Principal

- Meeting minutes of the executive board and general membership sessions
- Monthly Financial Report



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# Mandatory Training

- All officers whether returning or new must attend training
- As needed when a vacancy is filled



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# Fundraising

- Must complete application for each event and receive approval from Principal
- President of the organization is the signer on all contracts
- Organization parents must conduct and run their fundraisers
- All fundraising is subject to State and Federal taxes



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# Soliciting Donations

- Submit copy of donation request letter to the Principal for approval
- 501 (c)(3) Tax Exempt Boosters and PTOs must provide letter of determination and tax identification number to the donor to claim on their income tax filing
- Non-Tax Exempt Boosters and PTOs must present letter to the donor stating that they are not a 501 (c)(3) organization and cannot claim the donation on their income tax filing
- Texas PTA provides a letter of determination to PTAs
- Parent Organizations cannot use the School's or District's tax exempt number to solicit donations
- Donations are considered added revenue to organization's budget



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# Bylaws

- Bylaws must:
  - Be on file with the campus principal's office and Volunteer Programs Office
  - Be reviewed annually by the campus principal and Organization
  - Contain the rules of membership
  - State the organization's fiscal year and organizational structure and method used to elect officers
  - Specify that there is a two one-year consecutive term maximum that members may serve as President and Treasurer- no limitation on other officer positions



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# Bylaws continued

- Only one family member can be officer at the same time (limit vote per family to one)
- Require annual approval of budget
- If Parent Organization is incorporated:
  - Document retention policies
  - Conflict of Interest policies
  - Whistle Blower policies
- If the Organization is exempt it must report name, address and structural and operational changes (amended bylaws) to the IRS.



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# Meetings

- At a minimum 4 general meeting must be conducted yearly
  1. Beginning of year to approve budget, goals and fundraising agenda
  2. Election of Nominating Committee
  3. Election Meeting
  4. End of Year meeting to disclose Audit Report findings and annual report to the membership
- Should take place on campus premises
- Voting meetings must be held in the presence of the campus Principal or designee/sponsor
- Business determined at meeting without adequate campus representation shall be considered null and void



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# Officers and Their Elections

- At a minimum, the organization shall elect on an annual basis a President, Vice President, Secretary and Treasurer (Parliamentarian Optional)
- All members should have the ability to vote or hold an office
- May be elected in a variety of methods (simple majority, secret ballot) in accordance with the organizations bylaws



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# Yearly Required Documents

- Organizations are required to submit to the Principal and the Volunteer Program on a yearly basis:
  - End-of-year financial statements (including balance sheet)
  - GASB form
  - List of Officers
  - Returning Organization Form
- Submit by September 30 each school year



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# Employees and Financials

- Employees are advised not to serve in a financial capacity for a parent or booster organization
- Financial capacity is defined as treasurer, fund raising chair, check signer or any other function that involves the receipt and distribution of money
- Please refer to SISD Policy DBD (LOCAL)



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Q & A

# Questions



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# Closing



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