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COMMITTEE REPORT  
For the Time Period  
July 1, 20XX through June 30, 20XX**

The Review Committee members named below have reviewed the attached Financial Report and related financial activity for the time period of July 1, 20XX through June 30, 20XX, in detail. These members agree that the Financial Report and the related financial activity are not proper and correct, due to the following material exceptions:

- No documentation of cost existed for the 100 new books purchased.
- Checking and savings accounts were not reconciled during the year.
- Only one authorized signature appeared on all checks written instead of the two required authorized signatures as indicated in the booster club bylaws.
- No documentation exists showing sales for the Christmas Cards sold to determine whether the amount recorded in the Financial Report is correct.

To prevent the above exceptions from occurring in the future, the following steps should be taken:

- Documentation of all expenses, such as an invoice, should be received prior to payment of expense. Documentation should be kept with the other booster club records.
- All bank accounts should be reconciled on a monthly basis.
- All checks issued should be signed by at least two authorized officers.
- For all fundraisers, a record should be kept of the sales and the money deposited.

(not proper or correct due to material exceptions)

**XYZ BOOSTER CLUB REVIEW  
COMMITTEE REPORT  
For the Time Period  
July 1, 20XX through June 30, 20XX**

_____ Printed Name	_____ Officer Title/Member	_____ Signature	_____ / / Date
_____ Printed Name	_____ Officer Title/Member	_____ Signature	_____ / / Date
_____ Printed Name	_____ Officer Title/Member	_____ Signature	_____ / / Date
_____ Printed Name	_____ Officer Title/Member	_____ Signature	_____ / / Date

*Note: If a reviewer is a non-officer, their title (second column) should be "Member".*

## **SECTION 4**

# **FUNDRAISING GUIDELINES**

## **FUNDRAISER GUIDELINES**

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The Spring Branch Independent School District (SBISD) recognizes the importance and value of a positive fundraiser program. As your campus or organization prepares to conduct a fundraiser, please use these guidelines to assist in planning.

### **General Guidelines**

- The school principal or designee may approve or reject all booster club fundraiser programs. In determining whether to approve a fundraiser, the principal will consider the timing and types of fundraisers requested. The Principal may need to limit the number of fund raisers given the financial capacity of the school community.
- Any fund raising must be entirely a booster club fund raising event or a school fund raising event. Monies from booster club fundraising must be completely segregated from school fundraising monies. Receipt, safeguarding, and bank deposit of booster Club money can never be comingled with District money. A booster club fund raising event must be clearly and consistently identified as an 'XYZ Booster Club' event. The District has guidelines and procedures for student group and campus fundraising that are distinct from District policy and guidelines for booster club fund raising.
- Careful consideration should be given to limiting the number of major fundraising activities involving students. Members of the booster club, not students, are primarily responsible for fund raising.
- A principal may require use of the Fundraising Activity Report - Permission Request prior to any fund raising activity.
- Students cannot be required to participate in a fundraiser and cannot be required to raise a certain amount or sell a certain number of items. All money raised must be used to benefit the students as a whole not individuals. Accordingly individual fund raising accounts should not be used.
- Per SBISD GKD (local) policy, "PTAs and PTOs, Classification B: will not be charged a fee for use of facility if used Monday through Friday from 3:00 p.m. to 9:00 p.m. Special events such as banquets or fundraisers will be subject to employee service fees, as applicable. Activities held on a Saturday or Sunday shall be subject to employee service fees, as applicable.

### **Miscellaneous Issues**

- Law prohibits possession and/or consumption of alcoholic beverages by any individual(s) on school District property.
- Alcohol may not be consumed off school property while students are present at any booster club activity.
- Law prohibits smoking, possession, and/or use of any tobacco product by an individual(s) on school District property.

The District is very interested in your efforts to raise funds for our children, and we are available to support you in any way possible. Please feel free to contact the individuals listed in the contact list if you have questions or concerns.

# Spring Branch Independent School District Fundraising Activity Report Permission Request

**Instructions**

1. **The Permission Request must be completed and submitted to the principal for approval of the fundraisers to be held.** The Principal will return a copy of the form to the individual requesting permission.
2. **The Operating Report shall be prepared promptly upon completion of the fundraising activity.** The PTA / Booster Club Treasurer should complete the Operating Report no later than one week after conclusion of the fund raising event. Fund raising activity that is not reasonably profitable should not be repeated.

**Campus** \_\_\_\_\_ **Date** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Organization** \_\_\_\_\_ **Sponsor** \_\_\_\_\_

**Description and Purpose for which the net proceeds are to be used:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**With this Permission Request, submit samples of the fundraiser collateral if any such as the brochure, flyer, t- shirt or product design.**

**Type of Fundraiser**

- Catalog**
- Single Item Sale**
- Concessions**
- Other – Describe:** \_\_\_\_\_

**Fundraiser Start Date** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ **Fundraiser End Date** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Expected Profit**

Estimated Revenue \$ \_\_\_\_\_  
 Less: Estimated Cost of Fundraiser \$ \_\_\_\_\_ Equals:  
 Estimated Profit (Net Proceeds) \$ \_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 Sponsor/Person Requesting Permission Date

**APPROVED**  
 **DENIED** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 Principal Date

## Operating Report

Organization \_\_\_\_\_ Fundraiser \_\_\_\_\_

**Total Collections from Fundraiser:**

Date	Receipt #	Description	Amount
			\$
		Per Attached List (if needed)	
<b>Total Collections</b>			<b>\$</b>

**Total Disbursements for Merchandise, Advertising, Prizes, etc. for Fundraiser:**

Date	PO#	Payee/Vendor	Amount
			\$
		Per Attached List (if needed)	
<b>Total Disbursements</b>			<b>\$</b>

**Profit (Net Proceeds) from Fundraiser:**

Total Collections – Total Disbursements	\$
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\_\_\_\_\_  
Sponsor/Person Responsible for Fundraiser

/ /  
\_\_\_\_\_  
Date

**SECTION 5  
PURCHASING  
VENDOR CONTRACTS  
LIABILITY INSURANCE**



## Overview

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Your PTA / booster club is a separate entity from the school District not protected from liability by governmental immunity as the District is. Carefully read the entire contract and/or service agreement you are being asked to sign by your vendor. Unless your group is covered by its own general liability insurance policy (either an annual policy or one-day event policy) by signing a contract that includes an Indemnification Clause, Hold Harmless Clause, Waiver of Liability Clause, etc. you are accepting, in the name of your group and its officers, the risk for any and all losses (property damage, bodily injury, personal injury, etc.) incurred or resulting from the event you are contracting for. The District and/or a third party claimant can hold your booster club financially responsible for losses to property and persons. No school District employee can legally waive the District's rights to recovery, nor agree to hold a third party harmless.

The District strongly encourages PTA / booster club members to never sign any agreement that releases the contractor or vendor of their legal responsibilities unless the contractor or vendor has purchased their own insurance for the event adequate to cover ALL potential risks and provided the booster club with proof of such insurance.

The District's insurance requirements for contractors/vendors is [attached](#) as an example of reasonable types and amounts of insurance to require. Purchase of a 1 Day Special Event Liability insurance policy covering all potential losses may be another viable option.

Placement of any temporary structures such as tents, fencing, and porta-potties must be approved in advance. Sprinkler systems and underground utilities can be a problem if an event is placing equipment on campus grounds. Many vendor contracts specifically state that the renter is responsible for marking sprinkler systems and underground utilities. Please contact the campus Principal at least one week in advance. The Principal will work with the District's Facility Services Department to mark the areas for you.

Driving over unpaved landscaped areas is prohibited.

## Capital Equipment

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A typical booster club contribution to a school is in the form of money. However a PTA / booster club may purchase items such as computer equipment, playground equipment and constructed facilities for the benefit of a student group or campus. It is ultimately the District's responsibility to maintain the equipment beyond the original purchase. Accordingly it is in the District's best interest to accept equipment that is compatible with the District's current standards and specifications. The Principal must clear technology purchases with the District's technology department prior to any purchase. The Principal must clear purchase of outdoor equipment, indoor equipment that will require modification of a facility, or a construction project with the District's Planning and Construction department in advance of any commitment to purchase.