

GUIDELINES FOR AFFILIATED ORGANIZATIONS (ORGANIZATION)

Affiliated Organizations are organizations that work closely with the school. The Organizations may be involved in activities such as, but not limited to: planning and/or running school related activities, educating parents, providing staff appreciation activities, raising funds for school items.

- Establish officers of the Organization.
- Develop and adopt Organization By-Laws.
- Develop annual goals and budget plan for the Organization. Plan activities based on the goals and budget.
- Obtain liability and bonding insurance, if not requesting coverage under the District's insurance.
- File Request for Board Recognition of Affiliated Organization at least two weeks prior to the first Governing Board meeting of the school year.
- Obtain Principal's approval for fundraising activities using the District's Fundraising Request Form.
- Supervise students assisting with the fundraising.
- Follow the District's Community Use of Facilities Handbook when using the District's facilities.
- Bank account(s) is (are) in the Organization's name and federal EIN.
- Checks are required to have two authorized signatures. Debit/credit cards are NOT used.
- A monthly financial report, containing the following information, is prepared by the Treasurer after the receipt of each bank statement.
 - Listing of revenue sources.
 - Listing of expenses which includes date, check #, payee, description of expense, and amount.
 - Cash balance on this report reconciles to the bank statement ending balance.
- The monthly reconciliation and bank statement are to be reviewed, initialed and dated by a second officer prior to the monthly financial report being presented to the Organization's Board.
- The financial report is presented at the monthly meeting and attached to the minutes. A copy of the monthly financial report is available to Organization's Board Members and Members upon request.
- Minutes are produced for each Organization Board and/or Membership meeting, distributed to Officers/Members and maintained permanently.
- No District employee has any role in cash handling, money management, or functions related to the Organization's finances.
- The Organization does not pay District employees for services.
- Federal and state tax returns are prepared and filed timely, when required. A copy is permanently maintained.
- If the Organization is not under the District's insurance, the financial records are audited annually by an independent third party. The audit report is available to members upon request.
- If the Organization is covered under the District's insurance, all financial records will be presented to the Executive Director of Finance at the end of the school year and within two weeks of any additional request.