



# **PTA/PTO and Booster Club Sanctioning**

## **Enter your Name and Organization & EMAIL in the Chat Box**

September 15, 2022

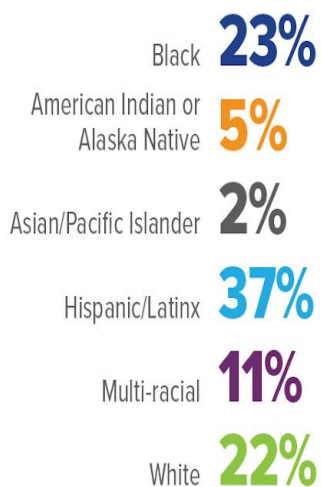




# ABOUT OUR STUDENTS

## OUR 33,211 STUDENTS\*

### RACIAL/ETHNIC DISTRIBUTION\*

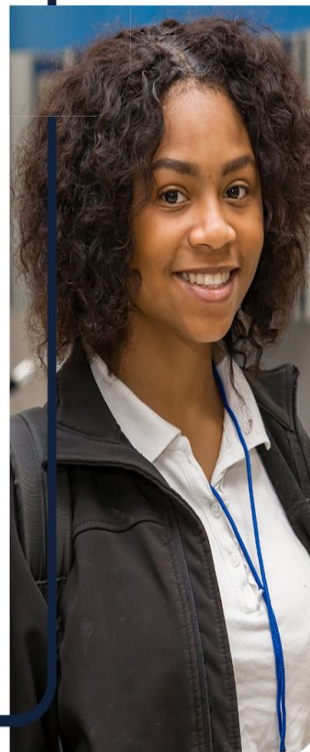


Economically disadvantaged  
**79%**

Gifted and talented  
**11%**

Students with disabilities  
**14%**

Multilingual learners  
**38%\*\***



\*As of October 1, 2021.

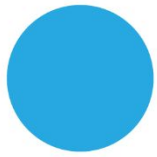
\*\*Represents both current and former multilingual learners



# Sanctioning Guidelines

*...and a reminder, if you haven't done so yet,  
Enter your Name, email and Organization in the  
Chat Box*





# Why are we here?

Student achievement programs, Parent-Teacher Associations and Booster Clubs play a critical role in supporting/enabling student and school activities.

## **Our objectives for today:**

- To discuss school board policy and regulations related to sanctioned groups.
  - Oklahoma law allows school boards to adopt policies that exempt specific organizations from the statutory controls of the school activity funds.
  - District policy protects the sanctioned group as well as the district by setting out the requirements and expectations of each party, and insures a separation between the district and the organization.
- Review financial reporting obligations
- Take a closer look at athletic booster clubs



# What are the two types of organizations?

*Organizations must operate in accordance with one of two classifications:*

## Not Sanctioned

- Must operate through the district's student activity fund
- Collect and deposit all revenue in the student activity fund
- All expenditures must be made through the student activity fund

## Sanctioned

- Operates outside the student activity fund
- Board of Education authorizes all sanctioned organizations
- Must apply to be sanctioned on an annual basis





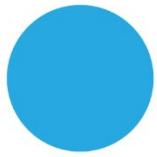
## What is Board Policy 5707?

- Establishes the guidelines for district sanctioned organizations.
- States that student achievement programs, Parent-Teacher Associations and Booster Clubs are eligible for sanctioning.
- States organizations must comply with state and federal laws as well as board policy and administrative regulations.
- States the Board of Education can revoke the sanctioned status of an organization if it is determined that the operation or purpose is not consistent with Board policies or procedures.



# What is required to become a sanctioned organization?

- Regulation 5707-R specifies what organizations must do as a sanctioned organization:
  - Complete an application form annually that includes information about the organization including purpose, goals, sponsor and statement of nondiscrimination.
  - Provide a copy of the organizations by-laws and/or constitution if applying for the first time.



# What is required to become a sanctioned organization?

- First timers also need to submit a copy of the confirmation letter from the IRS when you were issued your EIN (Employer Identification Number/Federal Tax ID Number)
- Must specify President and Treasurer of the organization and include valid emails
- These officers can not be district employees
- Must obtain the signature of the principal.





# What other documentation must be included with the application?

Organizations are required to provide the following documentation:

- Annual financial report as of June 30, 2022 – please use the form provided in the TPS packet
- Bank statement dated June 30, 2022 confirming reconciliation with the financial report
- Description of organizations membership requirements and dues schedule
- Description of planned fund raising



## What happens after I turn in my application and required documents?

- Office of the CFO reviews all applications and related documents.
- Recommendation made to the board to approve sanctioned statuses.
- Notification sent to the organization that board has approved their sanctioned status.



## What else do I need to know?

- Organization can **NOT** pay any district employee. All pay must go through the district's payroll
- Superintendent or board could request an audit by an independent accounting firm
- District can request that the organization provide all financial records
- Organization can not deposit any checks, warrants or money orders made payable to the District or individual school into the organization's account
- May not use the district's tax ID number



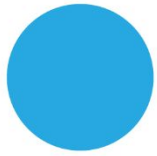
## What else do I need to know?

- Officers, members or employees of the organization are not permitted to receive monetary bonuses, stipends, non-cash assets or administrative fees
- If the organization is abolished, ceases to exist or is no longer sanctioned, the remaining funds shall be deposited into the school's Student Activity Fund
- Applications are due by October 1<sup>st</sup>, but can be turned in anytime after July 1<sup>st</sup> (need that June 30<sup>th</sup> bank statement)
- Submit application and related documents to Dawn Hamilton: [hamilbe@tulsaschools.org](mailto:hamilbe@tulsaschools.org)



## Other important guidance

- As leadership changes in the organization, please pass along information to the new officers. This is critical for the treasurer position.
- Beginning balance on the financial statement must equal the ending balance submitted on the financial statement for the prior year.



# What if I have questions?

*When in Doubt, ask your Principal*

*Or*

*Contact the TPS Finance Office as 918.746.6247*

Dawn Hamilton, Exec Admin Assistant [hamilbe@tulsaschools.org](mailto:hamilbe@tulsaschools.org)

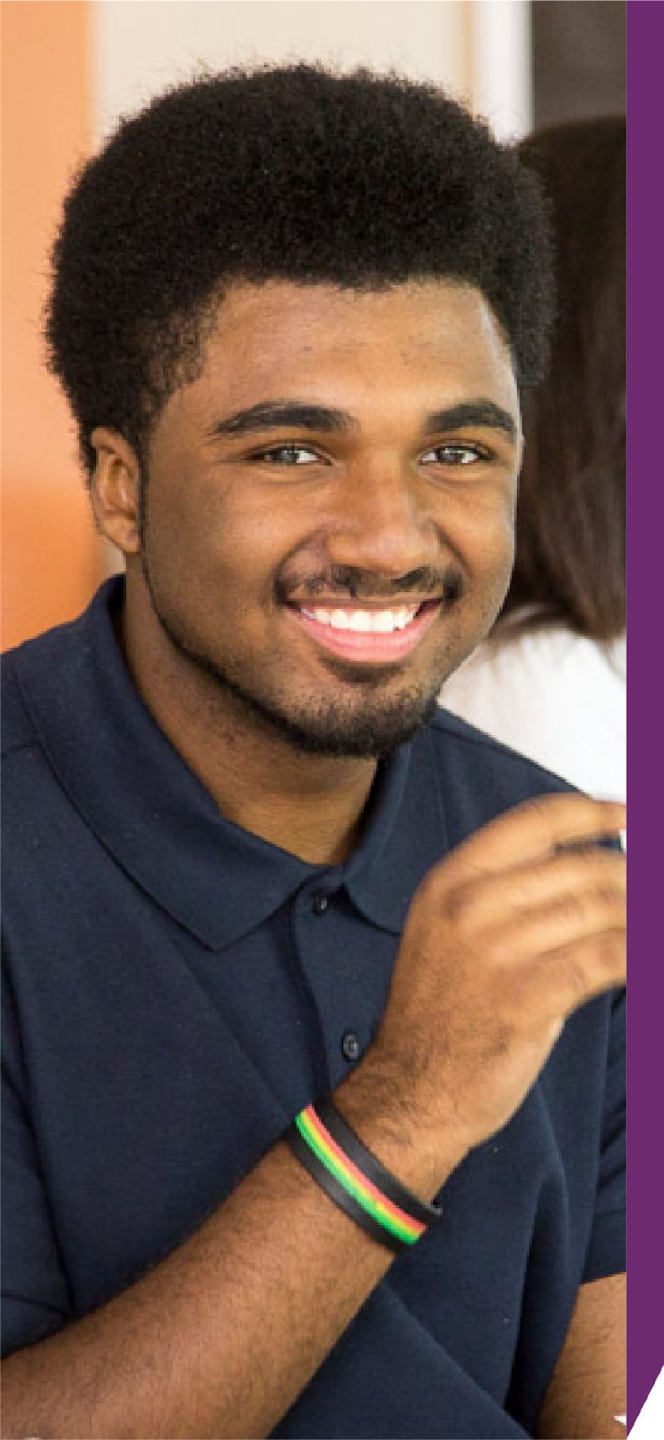
Joe Stoeppelwerth, Treasurer [stoepjo@tulsaschools.org](mailto:stoepjo@tulsaschools.org)

Michael Brown, Asst. Treasurer [brownmi6@tulsaschools.org](mailto:brownmi6@tulsaschools.org)

Kay Schmitz, Budget Director [schmika@tulsaschools.org](mailto:schmika@tulsaschools.org)

Mick Wilson, Exec Director of Athletics, [wilsomi2@tulsaschools.org](mailto:wilsomi2@tulsaschools.org)





# Accounting Practices TREASURER

***...and a reminder, if you haven't done so yet,  
Enter your Name and Organization in the Chat  
Box***





# Role of the Treasurer

- Your role is important with a lot of responsibility
- It is critical that you keep accurate records
- **Poor record keeping creates operational problems and puts the reputation of the organization and yourself at risk.**



# Duties of the Treasurer

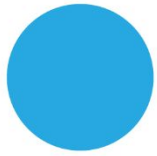
- Keep a full and accurate account of receipts and expenditures
- Make timely deposits
- Make disbursements as authorized by the organization
- Present a financial statement at each meeting
- Prepare or have prepared an annual financial reconciliation report

# Tulsa Public Schools -XYZ Parent Organization

## Statement of Revenues and Expenditures

	Description	Income	Expenses	Balance
1-Sep	Ending Balance			1,000.00
2-Sep	Fundraiser - T-shirt Sales	480.00		1,480.00
3-Sep	Concession Sales	200.00		1,680.00
4-Sep	Member Dues	1,250.00		2,930.00
5-Sep	Reimburse Mr. Jones for car wash supplies. Receipts attached		112.58	2,817.42
6-Sep	Concession stand supplies and candy- Sams		314.21	2,503.21
9-Sep	Fundraiser - We Design T-Shirts		325.00	2,178.21
10-Sep	Fundraiser-Car wash	600.00		2,778.21
13-Sep	Concession Sales	175.00		2,953.21
15-Sep	Donation- Pass the hat for uniforms	75.00		3,028.21
19-Sep	Uniforms -Teamsports.com		2,746.39	281.82
21-Sep	Donation - Mrs. Smith	200.00		481.82
24-Sep	Concession Sales	175.00		656.82
30-Sep	Bank Interest	.08		656.90

XYZ Parent Organization			
Bank Reconciliation			
For the Month Ending	September 30, 202X		
Ending Balance per bank statement		\$ 481.90	
Deposits in transit		\$ 175.00	
Outstanding checks		\$ -	
Reconciled Bank Balance @ month end		\$ 656.90	
Balance per checkbook @ month end		\$ 656.82	
Adjustments:			
+Interest		\$ 0.08	
-Bank charges		\$ -	
+/-Other		\$ -	
Reconciled Checkbook Balance @ month end		\$ 656.90	



# Recommended Procedures

- Financial information should be up to date and organized
  - The information should include receipts, source of receipts, expenditures including the payee's information and a description of the purchase or service, along with beginning and ending balances
- Checks should be signed by two officers
- Checkbooks and funds should not be kept on district property. Parent groups and booster clubs may have a safe on campus but school district personnel should not have access
- Officers should check the addition and subtraction on financial reports
- Officers should also compare the beginning balance to the previous period ending balance





# Money-Handling Procedures

- The Treasurer should count the money while in the presence of the person turning in the money
- The Treasurer should issue a receipt for all monies received
- Deposit all money turned in ***daily***
- Money received should only be deposited in the Booster Club's account
- Do not keep money in an unlocked drawer, cabinet, vehicle or other unsecure place
- Money received and not yet deposited should not be used for purchases, loans, advances, reimbursements, or for any other purpose



## **Tulsa Public Schools Booster Club Sanctioning Meeting 2022**

**Mick Wilson**  
**Executive Director of Athletics & Activities**

**Jen Sanders**  
**Deputy Director of Athletics**



# District Goal:



TO CREATE A POSITIVE AND



EFFECTIVE WORKING RELATIONSHIP



WITH OUR BOOSTER CLUBS



## The Role of Booster Clubs



- Supplementary financial support
- Public relations
- Fundraising
- Special events (meals, trips, etc.)
- Promote school pride & spirit

*Adherence to TPS and OSSAA rules, regulations and policies.*





# Communication

The first level of communication is with the head coach. The booster club should support the head coach and their vision for the program.

The site athletic director is the next level of communication. If there are questions that cannot be answered by the coach, please contact the athletic director.

If there are issues that cannot be worked out between the booster club and the athletic director, the next level of communication should be with the principal or the district athletic director.





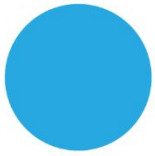
## Booster Club Funds

Booster clubs must be sanctioned by the Board of Education each year. Appropriate documents must be presented, and a current EIN number must be on file in the Finance office. Tax Exempt Organization / 501(c)(3)?

ALL FUNDRAISERS MUST BE APPROVED by the Principal, Site Athletic Director and the Deputy Director of Athletics.

Spending priorities for athletics programs will be determined by the site athletics director and the Head Coach with the approval of the building administration. The head coach should discuss program needs with the Athletic Director during their annual program evaluation.





# Booster Clubs & Additional Coaches Compensation

Booster clubs MAY compensate coaches with additional funds for duties over and above what they are paid for by the district, per the negotiated agreement with TCTA (Tulsa Teachers Classroom Association).

For example: A softball coach runs a weight training program or maintains the field during the summer. This is not part of their required duties as a softball coach in TPS, therefore the Booster Club may pay the individual for time they spent working in the summer.

Booster Club must adhere to the following guidelines:

- The Booster Club must be sanctioned through the office of the Chief Financial Officer
- The Booster Club must have a meeting and approve the additional stipend amount
- The payment from the Booster Club must be made to “TPS Athletics”
- The check, the terms of the payment and the minutes from the meeting must be included in the information sent to the District Athletics Office at the ESC
- The TPS Athletic Office will have a PO approved, place the item on the Board Agenda and will assist in routing payment to the appropriate individual through the TPS payroll office.



# Additional Coaches Compensation Continued

Schools paying stipends to coaches that come directly from the Student Activity Fund account MUST send the request to the District Athletic Office, where a Board Agenda item will be created. The school must approve the RQ at the site, through their normal board of control, and complete the appropriate payroll sheet to be sent to the District Athletic office.

Please recognize that the total amount of the payment will have tax implications. Normal deductions will be a part of the payroll procedure.

## Booster Stipend – Calculation of Gross Amount to Employee

### **Example**

Amount received from Booster Club \$6,000.00

Gross amount paid to employee \$5,121.64

Employer Taxes and Retirement

Social Security 6.20% 317.54

Medicare 1.45% 74.26

Teacher Retirement 9.50% 486.56

Total 17.15% 878.36

### Reconciliation

Gross amount paid to employee 5,121.64

Total Employer Taxes and Retirement 878.36

Amount received from Booster Club \$6,000.00



# OSSAA Rule 9

## What is OSSAA Rule 9?

### Rule 9 Section 1

OSSAA recognizes that permitting member schools to recruit students as athletes would place undue emphasis on secondary school athletic activities, and might cause competitive imbalances among member schools, misdirection of scarce educational resources, and threats to the continued amateur standing of students. Accordingly, no member school or ***any person with athletics related interest*** for that school is permitted to recruit a student to select or transfer to that school, or to encourage or allow others to do so on its behalf, based on that student's skill, reputation, or experience in athletics.



# OSSAA Rule 9 Continued

## **Rule 9 Section 2**

Recruiting includes initiating or maintaining contact with a student-athlete, or the student-athlete's family members, friends, or associates, in circumstances that could influence that student-athlete to select or transfer to a member school for the purpose of representing that member school in athletic competition. Offering economic incentives or rewards of any type to a student-athlete, which are not available to all prospective students on an equal basis, regardless of participation in athletics, or offering such economic incentives or rewards to the student-athlete's family members, friends, or associates, for the purpose of encouraging that student-athlete to select, transfer to, or remain at a member school, also constitutes recruiting in violation of this Rule. Recruiting may also include offering or providing special or additional coaching or instruction that is not offered or made available to other student-athletes at the school on an equal basis or providing special attention or consideration to a student-athlete who is considering transferring, for the purpose of influencing that student-athlete to remain at the school.



## OSSAA Rule 9 Continued

### **Rule 9 Section 7.C**

Acknowledgment and Notice of Rule.

All officers, administrators, supervisors, and sponsors of any club or organization supporting any athletic activity at a member school must sign a written certification that they are familiar with this Rule, and that the members of the club or organization have been informed about this Rule.

You will receive the following form from your site athletics director.



## Verification of Acknowledgment of Rule 9

### Prohibition on Recruiting or Influencing for Athletic Purposes

Each coach or volunteer providing instruction, assistance, or supervision in an athletic activity for a member school must sign this form certifying that the coach or volunteer is familiar with the Rule.

The head coach in each athletic activity for each member school must sign this form certifying that students participating in an activity have been informed about the Rule, that the school may be sanctioned for violations of this Rule, and that student athletes may be subject to sanction, including the loss of eligibility, if they have enrolled at or transferred to a school that has engaged in recruiting, or allowed its employees or representatives to recruit in violation of the Rule, or if they participate in recruiting other student athletes to enroll in or transfer to the school.

All officers, administrators, supervisors, and sponsors of any booster club or organization supporting any athletic activity at a member school must sign this form certifying that they are familiar with the Rule, and that the members of the club or organization have been informed about this rule.

I hereby verify by signing below that I have read and acknowledge OSSAA Rule 9 in its entirety and agree to abide by the Rule as stated.

(signature) (title or position)	
(signature) (title or position)	
(signature) (title or position)	
(signature) (title or position)	
(signature) (title or position)	

**THIS FORM IS TO BE KEPT ON FILE AT EACH MEMBER SCHOOL AND PRESENTED FOR REVIEW UPON REQUEST BY THE OSSAA.**





# Title IX

What is Title IX?

The Title IX Education Amendments Act was passed in 1972.

The law states:

No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to the discrimination under the benefits of or be subjected to discrimination under any education program or activity receiving federal financial assistance.





# Title IX

Who does Title IX apply to?

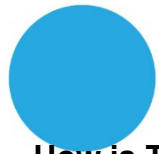
Title IX applies to all educational institutions, both public and private, that receive federal funds. Almost all private colleges and universities must abide by Title IX regulations because they receive federal funding through financial aid programs for their students.

How is Title IX applied to athletics?

Athletics programs are considered to be educational programs and activities.







# Title IX

## How is Title IX applied to athletics?

**Athletics programs are considered to be educational programs and activities.**

There are three basic parts of Title IX as it applies to athletics:

**Scholarships:** Title IX requires that female and male student-athletes receive athletics scholarship dollars proportional to their participation;

**Participation:** Title IX requires that women and men be provided equitable opportunities to participate in sports. Title IX does not require institutions to offer identical sports but an equal opportunity to play;

**Other benefits:** Title IX requires the equal treatment of female and male student athletes in the provisions of: (a) equipment and supplies; (b) scheduling of games and practice times; (c) travel and daily allowance/per diem; (d) access to tutoring; (e) coaching, (f) locker rooms, practice and competitive facilities; (g) medical and training facilities and services; (h) housing and dining facilities and services; (i) publicity and promotions; (j) support services and (k) recruitment of student-athletes.





## Title IX

### Know Your IX

#### 8 Things to Know About Title IX

- Title IX is a landmark federal civil right that prohibits sex discrimination in education.
- Title IX applies to both female and male students
- Schools must have an established procedure for handling complaints of sexual discrimination, harassment, or violence.
- Schools should ensure that a victim doesn't have to share spaces such as dorms, classes and campus jobs with his or her assailant.
- Schools may not retaliate against someone filing a complaint and must keep a complainant-victim safe from other retaliatory harassment or behavior.
- Schools can issue a no-contact directive under Title IX to prevent the accused student from approaching or interacting with you.
- In cases of sexual violence, schools are prohibited from encouraging or allowing mediation (rather than a formal hearing) of the complaint.
- Schools cannot discourage you from continuing your education.

#### Gender-Based Violence & Harassment

Under Title IX, discrimination on the basis of sex can include sexual harassment or sexual violence such as rape, sexual assault, sexual battery, sexual coercion, or dating violence. If you do not know how to report sexual harassment or bullying, ask your coach, Athletic Director or any administrator, school counselor, social worker or the TPS Human Rights Coordinator.



## Coca Cola Representative



**Roy Fryer**

Phone number:  
918-218-7240

Email: [roy.@cocacolaswb.com](mailto:roy.@cocacolaswb.com)

CS: 844-561-2653



# BSN / NIKE



**Rusty Zumwalt**

Phone number: 918-640-7416

Email: [rzumwalt@bsnsports.com](mailto:rzumwalt@bsnsports.com)

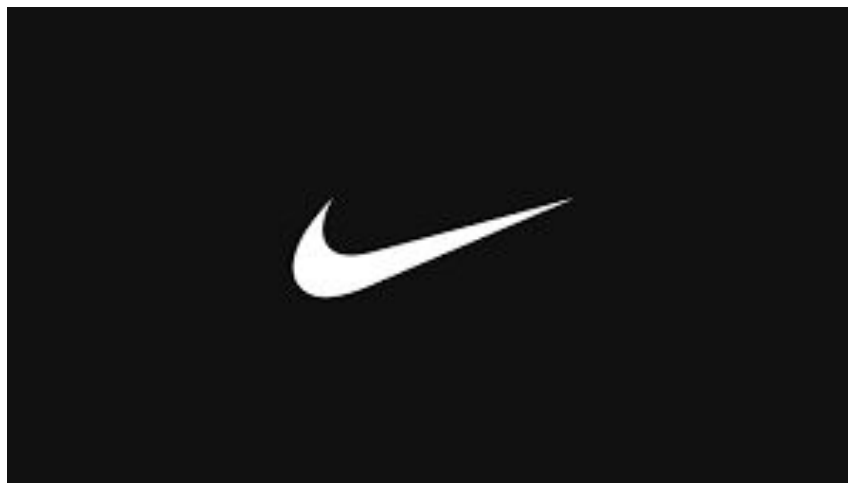
**Jason Roberts**

Phone: 918-798-8646

Email: [jroberts@bsnsports.com](mailto:jroberts@bsnsports.com)

**FAN CLOTH**

<https://www.fancloth.com/>

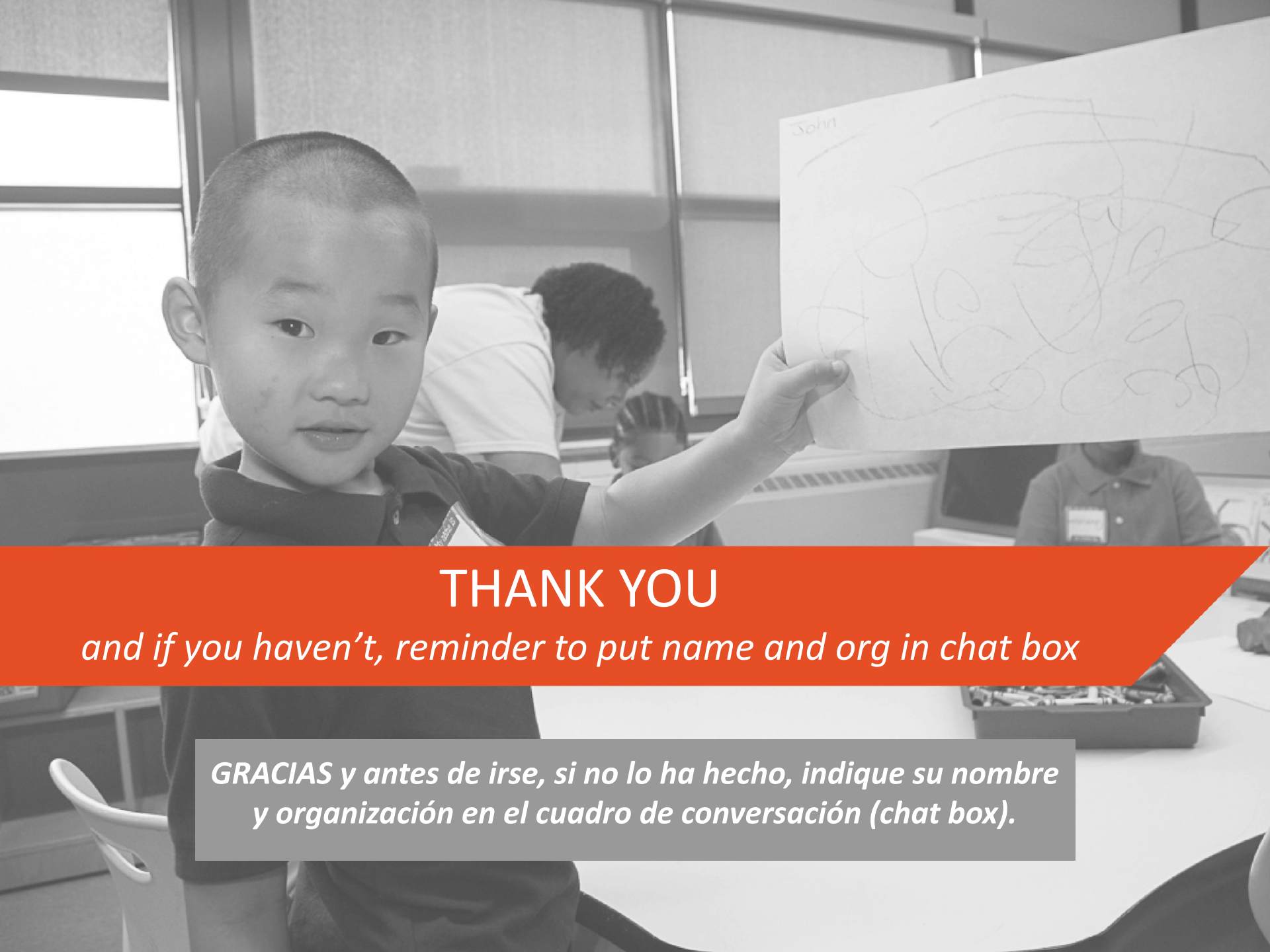




## **Booster Club Sanctioning Meeting**

Thank you supporting our students,  
coaches, and schools.

We appreciate YOU!



THANK YOU

*and if you haven't, reminder to put name and org in chat box*

***GRACIAS y antes de irse, si no lo ha hecho, indique su nombre y organización en el cuadro de conversación (chat box).***





# What if I have questions?

*When in Doubt, ask your Principal  
Or*

*Contact the TPS Finance Office as 918.746.6247*

Jorge Robles, Chief Finance & Operations Officer [roblejo@tulsaschools.org](mailto:roblejo@tulsaschools.org)

Dawn Hamilton, Exec Admin Assistant [hamilbe@tulsaschools.org](mailto:hamilbe@tulsaschools.org)

Kay Schmitz, Budget Director [schmika@tulsaschools.org](mailto:schmika@tulsaschools.org)

Michael Brown, Asst. Treasurer [brownmi6@tulsaschools.org](mailto:brownmi6@tulsaschools.org)

Mick Wilson, Athletic Director, [wilsomi2@tulsaschools.org](mailto:wilsomi2@tulsaschools.org)

**TO VIEW A RECORDING OF THIS PRESENTATION (from Sept-15-2022), copy and paste the link below to your browser - do not click on the link but copy & paste the entire link to your browser**

**[https://tulsaschools-org.zoom.us/rec/share/Zlbej6BwonKoWCs7C2W7D3XVYbHdQAkhMaEQMO\\_UA-oHHt6CeQJLsfNKFfgPONqz.AsJtxbsHKK9w4ySh?startTime=1600817669000](https://tulsaschools-org.zoom.us/rec/share/Zlbej6BwonKoWCs7C2W7D3XVYbHdQAkhMaEQMO_UA-oHHt6CeQJLsfNKFfgPONqz.AsJtxbsHKK9w4ySh?startTime=1600817669000)**

**Enter passcode: FY22-23 Sanctioning**