

GENERAL GUIDELINES FOR ESTABLISHING AN EXTERNAL BOOSTER GROUP

- 1) The group must receive local board approval to establish, lend support, seek assistance, or fundraise in the name of the district, school, students, or a district or school program.
- 2) Complete and sign the current Booster Agreement (form 09.33 AP.2, ver. 7/24/2017)
- 3) Choose a Name - The name should clearly identify the organization and its purpose. You may want to come up with a few alternative names, too, just in case your first choice is taken when you seek to register it with the state.
- 4) Define Your Mission - It should be a clear, comprehensive, concise definition of who the group is, why you exist, who will benefit from your work and what your core priorities and activities are.
- 5) Define and Formalize Organizational Roles and Responsibilities - You should develop a list of all of the key roles that are or will be available within your organization and define their respective key responsibilities.
- 6) Enlist and Elect a Board of Directors - should consist of President, Vice President, Secretary, Treasurer and chairs for your various activity committees. Be sure to enlist and elect board members who have the requisite leadership and other skills required to handle the positions for which they are being enlisted. We recommend that the Treasurer be bonded.
- 7) Open a Temporary Bank Account - open a temporary bank account at a local bank. Establish the account in the name of a board member for the benefit of your booster organization - an account that you can change into a formal business account once you receive proper state and federal approvals.
- 8) Engage Legal Counsel if needed - once you have a name, a board and some organizational funds, you may want to seek a local attorney to guide you through the incorporation process. An attorney can help obtain needed state and federal paperwork, draft organizational bylaws and prepare and file your state required Articles of Incorporation.
- 9) Research and obtain necessary paperwork - Your legal counsel or the board secretary should contact the Secretary of State's Office (<https://www.sos.ky.gov>) to obtain necessary paperwork for incorporating as a non-profit group. Meanwhile, your board treasurer or your legal counsel should also contact the IRS (<https://www.stayexempt.irs.gov>) to obtain the paperwork needed to apply for non-profit or 501(c)(3) status.
- 10) Complete and File Your Articles of Incorporation with the State - This document gives legal recognition to your organization and is required in order to lawfully operate.
- 11) Develop Organizational Bylaws - The bylaws explain how the organization will run on a day to day basis. They explain what the board's, its officers and committee heads' roles and responsibilities are and the rules of how the organization will operate.
- 12) Establish a Permanent Bank Account
- 13) Obtain General Liability Insurance - The insurance must be a yearly contract (it cannot be special event insurance). We recommend a \$1,000,000 coverage.