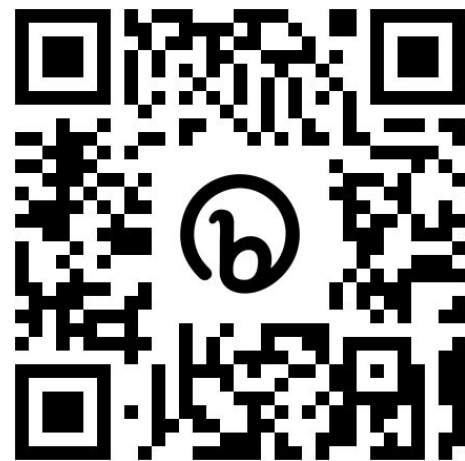


PTO/ Booster Spring Officers Meeting

Roles & Responsibilities

Sign In Here: bit.ly/3Vcdpq6



KLEIN ISD
Financial Services Support
Jason Gossett, Executive Director
May 2, 2023

Norms

Ensure that students are always at the center of our work.

Planning & Coordination

- Share in advance a vision-centered agenda that includes clear goals and time for reflection and questions.
- Assign action items with owner and due date;
- Start on time and end on time, while always respecting everyone's time.

Participation

- Be on time and present, prepared, and **fully engaged**.
- Share in collaboration and conversation that is positive, respectful, and solution-oriented.
- In all interactions, assume positive intent, remain transparent, maintain confidentiality and respect feedback.
- Engage in a growth mindset, and always think “we” not “me”.
- Avoid all distractions not related to the meeting. Step out to handle important business.
- Intentionally praise and celebrate others.
- Hold one another accountable to the norms.

IN KLEIN ISD, **EVERY** STUDENT ENTERS WITH A **PROMISE** & EXITS WITH A **PURPOSE**

Our shared vision is accomplished through our strategic priorities of Cultivate Talent, Build Community, and Reimagine Learning. Our Guiding Documents of Profile of a Learner, Profile of a Leader, and our Definition of High-Quality Teaching align and drive our work for our students.

Cultivate Talent



Klein ISD will listen, learn & continuously improve to ensure our employees are fully supported & engaged.

- Recruit and retain high-quality employees to benefit student outcomes
- Develop and value our employees in every position through personalized, professional learning and meaningful leadership development opportunities
- Foster opportunities for two-way communication and collaboration that empower our employees to be heard and have a voice that positively impacts and supports Klein ISD's tradition of excellence

Build Community



Klein ISD will build trust with our students, parents, families & community to know & serve every student by name, strength & need.

- Maintain safe and disciplined schools to ensure learning environments that develop students of integrity
- Equip our parents and families with resources and support to be successfully engaged in their children's learning journey
- Encourage positive and productive partnerships between the Klein Family and Klein community so that every person is treated with dignity and respect

Reimagine Learning

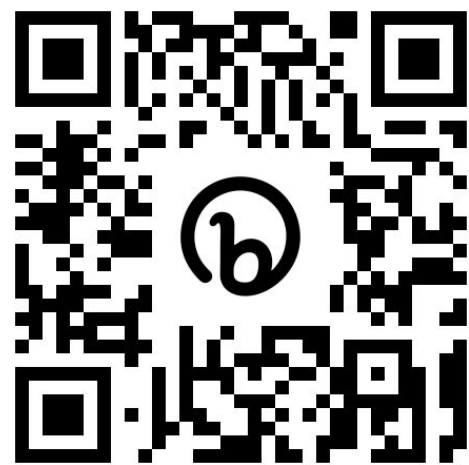


Klein ISD will provide the best learning experience to empower our learners to excel in academics, the arts & athletics.

- Provide an engaging curriculum rooted in a strong academic foundation that supports real-life, meaningful learning opportunities to inspire every learner
- Ensure a learning environment that supports strong mental health and overall wellness for every member of our Klein Family
- Partner with parents and families to guide our students in pursuing and achieving their learning goals for college, career, and military aspirations through innovative pathways of choice

TODAY'S GOALS

Sign In Here: bit.ly/3Vcdpq6



Learn- Today we will learn about the roles and responsibilities of the core 4 officer positions.

Review- We will review some important dates and timelines coming up.

Collaborate- We will discuss, ask questions, and ensure that everyone is heard.

Follow up- We will have a meeting in the Fall with more details about Sales Tax and 990 Filings.

Thank you to our PTO & Booster Club Presidents!



RESOLUTION OF THE BOARD OF TRUSTEES OF THE KLEIN INDEPENDENT SCHOOL DISTRICT

Whereas, Klein, Texas is a special place to call home, full of a rich tradition of excellence in education, resulting in students exiting with their purpose with many alumni returning home to Klein to raise future generations; and,

Whereas, our intentional efforts of creating a family atmosphere by treating one another with respect, integrity, and goodwill has evolved into what is known as the "Klein Family," and,

Whereas, collective decisions are made in the best interest of our students in order to provide optimal student learning, character development, and achievement outcomes; and,

Whereas, it is established that a strong and productive partnership between families and educators positively impacts a student's learning experience and is a fundamental building block of a healthy society; and,

Whereas, our Klein Family is recognized at the state-level as a model school district for family engagement, to bring unity and purpose through effective partnerships with families to ensure success of every student in our collective care; and,

Whereas, Klein ISD values that a parent is a child's first and most important teacher, the District will continue to work tirelessly to facilitate strong and effective relationships between schools and families, advance policies and practices that strengthen parental involvement, and strengthen effective two-way communication channels;

Therefore, Be It Resolved that the Klein ISD Board of Trustees does hereby honor families first through our strong Klein Family culture. Furthermore, we honor a spirit of volunteerism, cooperation, mutual trust, and respect as we continue working together to take excellent care of the future of our cherished students.

Signed this 10th day of January 2023.


Mr. Rob Ellis, President


Ms. Cathy Arellano, Vice President


Mr. Dustin Creager, Secretary


Dr. Jenny McGowan, Superintendent


Mr. Ronnie Anderson, Trustee


Mr. Doug James, Trustee


Ms. Georgan Reitmeier, Trustee


Mr. Chris Todd, Trustee



Board Approves Family First Resolution January 2023



#KleinFamily  #Promise2Purpose

PSO Website

Bookmark the www.kleinisd.net/psa website for reference.

Handouts for this meeting can be found under Financial Meeting or at the following site: bit.ly/23SpringOfficers

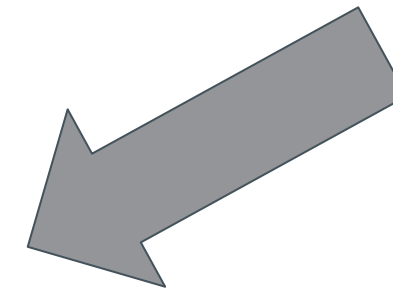


Parent Support Organizations



Thank you for your interest and support of parent organizations that enhance and enrich the extracurricular and curricular efforts of our students. Klein ISD is fortunate to have an abundance of involvement and support from families who are involved in their child's activities before, during, and after the school day. Your contribution of time and energy in events from Open Houses to Family Fun Nights energize our teachers and staff. Do not hesitate to contact the school principal or the PTO/Booster Club leadership with questions on involvement in our schools.

For more information, please contact Tara Tims, ttims1@kleinisd.net or Melissa Silva, msilva2@kleinisd.net.



Roles

PTO/PFO / Booster

Purpose: to help promote, support, and improve the school program

Accomplished by:

- Focusing on Students
- Complying with all state & federal laws, IRS regulations, district policies, regulations, and priorities
- Volunteering; promote volunteer hours
- Option to hold up to 3 additional fundraisers to benefit the school
- Shares ideas & feedback; cannot dictate how donated funds are spent

Campus Administration/ Sponsor -

- Directs the activities of the campus/ program & oversees the activities of the parent organization
- Approves formation/partnership with parent organization
- Reviews & approves all student/school-related activities for consistency with District policy & goals
- Approves all fundraising requests
- Approves all donations



Secretaries/ Treasurers



Secretaries

Prepare agendas for general meetings

Record the minutes of all meetings of the Directors and furnish a copy of such minutes to the President within one week following the meeting

- Minutes should include attended/unattended members, description of reports from directors & committees, fundraising updates, financial update, any new business/action items, etc.

Maintain a file of all approved minutes, agendas, & materials distributed at an official PTO/PFO meeting

Catalog and supervise property of the organization

Secretaries

Coordinate all correspondence relating to the organization

Publish all notices of meetings or other matters

Other duties as deemed necessary by the Directors

Treasurers - cannot be district employee

Monthly

Post all financial transactions to the financial system as they occur throughout the month.

Keep an accurate record of receipts and expenditures

- Receive all funds for the organization and promptly deposit them in the organization's bank account
- Write checks as needed (two signatures and proper paperwork required) in accordance with the approved budget.

Co-signs checks with President or other authorized signer

Reconcile bank account monthly

Treasurers - cannot be district employee

Monthly

- Create monthly treasurer reports (budget reports) for board meetings
- File monthly/quarterly sales tax reports with Comptroller if applicable
- Keep financial forms (tax exempt forms/check requests) available for volunteers

Annually

- Establish good accounting procedures
- Lead the annual budget process

Treasurers - cannot be district employee

Annually

- Present the budget for approval at the first general membership meeting of the year
- File 990/990 EZ/990 N with the IRS
- File annual sales tax reports with the Comptroller if applicable
- Issue 1099-MISC tax forms
- Establish and maintain permanent files for financial records
- Turn over all financial records to the new treasurer as applicable
- Other duties as deemed necessary by the Directors



Presidents / Vice Presidents



Presidents

- **Presides at all meetings**
- **Primary contact to the principal**
- **Set schedule for monthly board meetings for the year**
- **Coordinate the work of the directors and/or committees**
- **Ensure necessary reports are made timely to appropriate State and Federal agencies as well as to the campus/district**
- **Submit fundraiser requests for approval**
- **Responsible for all financial affairs and associated reporting including any duties that may be delegated**

Presidents

- **Co-signs checks along with Treasurer (unless district employee)**
- **Ensure annual audit is performed**
- **Submit a year-end financial report to the school principal no later than June 15th**
- **Other duties as deemed necessary by the Directors**

Vice-Presidents

- **Assist the President**
- **Assume the duties of the President in the event of the President's inability or resignation**
- **Co-signs checks if the President is unable to do so**
- **Act as Parliamentarian (expert on by-laws) if there is no other parliamentarian role.**
Familiarize yourself with Robert's Rules of Order.
- **Chair (oversee) organization committees**
- **Maintain a roll of all members of the organization**
- **Other duties as deemed necessary by the Directors**

General Guidelines (not all inclusive)

Responsibility for proper collection, disbursement, and safeguarding of all money & all other parent organization assets rests solely with the parent organization's officers, not the school district or any of its employees

Responsibility for proper reporting of parent organization activities to the IRS, State Comptroller, and to Klein ISD rests solely with the parent organization's officers, not the school district or any of its employees

General Guidelines (not all inclusive)

- No commingling of PTO/PFO funds with school money is permitted
- Funds may not be loaned to school employees
- PTO/PFO should ensure funds are available to meet its obligations. The PTO/PFO does not have the authority to commit or represent that Klein ISD is responsible for its obligations (whether paying bills or any other agreement)
- Should seek competent tax and legal advice on your own and at the expense of the PTO/PFO on an as needed basis

General Guidelines (not all inclusive)

- Funds should benefit the organization as a whole and not an individual (fundraising cannot only go to those that participate)
- Payment for services cannot be made directly to Klein district employees but must be processed through the KISD business office.
- Donated funds and/or assets must be coordinated with the campus principal in advance
 - Special district guidelines apply to technology and items involving construction or that are permanently installed on district property
 - If approved, property purchased with parent organization funds becomes the property of the school district
 - ***Recommendation in most cases is to donate funds and for district to purchase***

General Guidelines (not all inclusive)

- **“Petty Cash” funds may not be established for a teacher/coach/sponsor to use at their discretion**
- **Cannot give a teacher, coach, or sponsor a gift in excess of the limits imposed by the Klein ISD board of Trustees’ Policy, which is the same the district can spend for a letter jacket awarded to students ~\$80-\$100**
- **Limit of 3 fundraisers and must have advance approval from campus principal**
- **Comply with all district policies and regulations**

RAISING FUNDS

Fundrasier



Donation

A planned event, sale of products, or drive for requesting funds		Charitable contribution
Actively soliciting funds		Passive incoming funds
Communicating, sharing, and asking for funds		Posted on website or board without active communication
School Pictures		AmazonSmile
Item received in exchange for funds		Item received regardless of funds donated
Donation Drives		Spirit Nights

Activity Funds may not reimburse parents or the booster club. The booster club may donate funds to the Activity Funds account to assist in purchasing.

Reminders

Be sure all fundraiser analysis forms have been completed for the year

June 15th - submit financial reports (Balance Sheet/Income Statement)

June-August - perform an audit of 22-23 records

***August 1st - deadline for 2022-2023 Year End Information Sheet**

Sept 15th - deadline for audit report

Sept 18th - Fall Annual Meeting (presidents/treasurers)

October 15th - deadline for fundraiser requests

November 15th - 990 due to IRS (for FYE June 30th)



THANK YOU!!!

Your Support leads to
their Success.



Reflections & Closing

Feedback, we want to hear from you.
Email your feedback or specific questions to
Jgossett3@kleinisd.net