

BOOSTER CLUB & PARENT ORGANIZATIONS

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Chief Financial Officer



WWW.WILLISID.ORG

Why We're Here



Willis ISD is incredibly fortunate to have parents and community members willing to give their time, talent, and financial support to our students. **PTOs and Booster Clubs** make opportunities possible that otherwise would not exist.

Our goal tonight is to help your organization succeed while protecting **both your organization and the District.**



OUR COMMUNITY

Parents and community members bring passion, ideas, and support.



OUR STUDENTS

Your support creates enriching experiences and more opportunities for students.



OUR PARTNERSHIP

Working together strengthens our schools and our community.



OUR RESPONSIBILITY

Following best practices protects your organization and the District.

— *Together, we make a difference.* —

SAME MISSION. SEPARATE ORGANIZATIONS.



PTO / BOOSTER CLUB

Independent Nonprofit Organization



Supports students and school programs through fundraising and volunteer efforts.



Operates independently with its own officers, bylaws, bank account, and financial responsibilities.



Determines how to raise and donate funds in coordination with campus administration.



Provides educational programs and is responsible for all district operations, employees, and student activities.



Approves the acceptance and use of donations to ensure they align with district needs, safety, and policy.



Oversees district resources and compliance with state law, Board policy, and UIL requirements.



Together, we share the same mission—supporting students—
**BUT WE HAVE DIFFERENT LEGAL RESPONSIBILITIES
AND FINANCIAL OBLIGATIONS.**

HOW A BOOSTER CLUB OPERATES INDEPENDENTLY



Booster clubs are separate legal entities from Willis ISD.

You exist to **support students and programs**—not to operate the school.

BASIC REQUIREMENTS



Separate Legal Entity

Operate as your own nonprofit organization under federal and state law.



Governing Documents

Adopt and follow your own bylaws that outline your purpose, structure, and procedures.



Separate Finances

Maintain your own bank account, keep accurate records, and prepare your own financial statements.



Elected Officers

Have elected officers who manage day-to-day operations and decision making.



Tax-Exempt Status

Maintain your own 501(c)(3) status and comply with IRS and state filing requirements.



IMPORTANT: YOU CANNOT USE THE DISTRICT EIN NUMBER.

Booster clubs must obtain and use their own Federal Employer Identification Number (EIN) for:

- Opening a bank account
- Filing taxes and required reports
- Applying for tax-exempt status
- Conducting fundraising activities
- Any legal or financial transactions

Your organization is responsible for its own compliance, records, and filings.



INDEPENDENT ORGANIZATION. SEPARATE FINANCES. SHARED MISSION.

When we work together, we create the best opportunities for our students.

WORKING TOGETHER. FOLLOWING THE RULES.



Booster Clubs and PTOs play a vital role in **supporting extracurricular and student activities**, enriching the educational experience for all students.



MUST COMPLY

Booster Clubs and PTOs must comply with **WISD policies, UIL guidelines, and all federal and state laws.**



FOLLOW WISD POLICIES AND PROCEDURES

All Booster Clubs and PTOs are expected to follow Willis ISD policies and approved procedures.



GUIDANCE, NOT LEGAL ADVICE

Willis ISD provides guidelines and resources, but does not provide **legal or financial advice.**



*By working together and following the rules,
we create the best opportunities for our students.*

DISTRICT POLICY



➔ BOARD POLICIES



Relations with Parent Organizations
(GE Local)



**Community Relations Non-school
Use of Facilities**
(GKD Local)



**Community Relations School
Volunteer Program**
(GKG Legal)



HOW PURCHASES WORK



1 **Booster Identifies Need**



2 **Discuss with Sponsor/Principal**



3 **Administrative Approval**



4 **Booster Votes (if required)**



5 **Purchase Made**



6 **Donation Accepted (if applicable)**



7 **District Places Into Service**

BOOSTER CLUB DO'S & DON'T'S



BOOSTER CLUBS CAN



Donate equipment



Donate funds



Donate uniforms



Sponsor student activities



Support campus goals in partnership with administrators



BOOSTER CLUBS SHOULD NOT



Purchase district items without approval



Pay district employees directly



Control district programs



Use the District's EIN or bank account



Commit the District to contracts or purchases



Represent themselves as Willis ISD

IRS Basics



File annual IRS Form 990-N / 990-EZ / 990



Maintain 501(c)(3)



Renew Texas Sales Tax Exemption



Keep EIN information current



Failure to file IRS reports for three consecutive years results in automatic loss of nonprofit status.



FINANCIAL BEST PRACTICES



1

Obtain administrative approval before fundraising.



2

Maintain separate bank accounts and never commingle funds.



3

District employees should not serve in financial officer roles.



4

Keep complete financial records and receipts.



5

Require two authorized check signers.

Good financial controls protect your organization, your volunteers, and the students you serve.



ANNUAL REQUIREMENTS



Every booster club/PTO must submit these **6 things** to the district on an annual basis:

1



A copy of the organization's bylaws, signed and dated by the president.

2



The name, address, and telephone number of the persons authorized to sign any legal papers, documents.

3



The name, address, and telephone number of all current officers.

4



The name, address, and telephone number of the depository for the organization's funds.

5



A copy of the most recent financial statements.

6



A schedule and/or calendar from the booster club for fundraising activities including location and a brief description.





WHAT IF AN ISSUE ARISES?

What if an issue arises within the **PTO** or **Booster**?



01

COMMUNICATE THE ISSUE

Communicate the issue to the campus principal or Program Director.



02

DISTRICT GUIDANCE (NOT MANAGEMENT)

The District can provide guidance, but does not have management authority for your organization.



03

RESOLVE PER BY-LAWS & REPRESENTATIVES

The issue will need to be addressed by the terms of the by-laws and by the organization representatives.



★ **WORK TOGETHER.** ★
STAY FOCUSED ON STUDENTS.



Clear communication and following your by-laws help keep your organization strong and successful.

THANK YOU!



FREQUENTLY ASKED QUESTIONS



**CAN A COACH
BE TREASURER?**



No.



**CAN WE BUY
EQUIPMENT?**



Yes, after working with
campus administration.



**CAN THE DISTRICT
USE OUR EIN?**



No.



**CAN WE GIVE GIFT
CARDS TO STAFF?**



Generally discouraged;
there may be tax implications.



**CAN WE PAY A DISTRICT
EMPLOYEES DIRECTLY?**



No.



When in doubt, ask! Working together and following district policies helps keep our programs compliant and our students first.

THANK YOU!

Other Resources

Agency	Website/Phone	Focus
 IRS	irs.gov/charities-non-profits/ (877) 829-5500	Charities & Non-Profits
 Texas SOS	sos.state.tx.us / (512) 463-5555	General & Nonprofits
 Texas Comptroller	comptroller.texas.gov/ 1-800-252-5555	Taxes & Exemptions
 UIL	uiltexas.org / 512-471-5883	Booster Guidelines
 Wills ISD	willsisd.org / Departments: Business+Finance	Booster Info & Policies (SBGE Legal / Local)



*Use these resources to support your booster organization.
Stay informed. Stay compliant. Support our students!*

Booster Club & PTO Website Resources

Your one-stop resource for information, forms, and guidelines.

District Website

HOME > DEPARTMENTS > BUSINESS & FINANCE

Business & Finance

Financial Transparency Debt Transparency Business Office Staff Benefits ESSER Funds

Federal Programs Public Postings Purchasing & Vendors **PTO/Booster Clubs**

BOOSTER CLUB GUIDELINES PRESENTATION

BOOSTER CLUB GUIDELINES



Booster Club Guidelines Presentation

Training materials from tonight's meeting.



Booster Club Guidelines

Complete handbook with requirements and best practices.



WHAT YOU'LL FIND



Booster Club Guidelines

Complete guidelines with requirements, responsibilities, and best practices.



Presentation & Training Materials

Resources and training materials to help your officers succeed.



District Policies & Resources

Important board policies, procedures, and helpful reference documents.



Helpful Links & Contacts

Quick access to important websites and district contact information.



Pro Tip:

Bookmark this page! It contains the most current forms, guidance, and resources for your organization throughout the year.



Find this and other resources at:

www.willisisd.org

Departments > Business & Finance > PTO/Booster Clubs

We're here to help!

Getting Started Booster Club & PTO Website Resources

Follow these simple steps to establish your organization the right way.

District Website

Getting Started

- + STEP 1 - FORM A COMMITTEE
- + STEP 2 - OBTAIN APPROVAL FROM PRINCIPAL
- + STEP 3 - DEVELOP GOVERNING DOCUMENTS
- + STEP 4 - EMPLOYER IDENTIFICATION NUMBER (EIN)
- + STEP 5 - FILE FOR CERTIFICATE OF INFORMATION
- + STEP 6 - HOLD GENERAL MEMBERSHIP MEETING
- + STEP 7 - OBTAIN 501 (c) 3 EXEMPTION
- + STEP 8 - APPLY FOR SALES TAX PERMIT
- + STEP 9 - SALES AND FRANCHISE TAX EXEMPTION
- + STEP 10 - SEND COPIES TO PRINCIPAL
- + STEP 11 - CREATE PERMANENT DOCUMENTS FILES



WHAT THIS SECTION PROVIDES

A step-by-step roadmap to help you form and establish your booster club or PTO with the district and the state.



Ensure Compliance – Follow all legal and district requirements.



Stay Organized – Complete each step to build a strong foundation.



Avoid Delays – Having everything in place keeps your organization moving forward.



Support Your Mission – Proper setup allows you to focus on what matters most – our students!



Pro Tip:

Work through each step in order. This will save time and help you start the school year successfully!



Find this and other resources at:

www.willisisd.org

Departments > Business & Finance > PTO/Booster Clubs

District Website

Quick access to important resources and helpful information for your organization.

i

Helpful Information



2025 WISD BOOSTER CLUB PTO
PRESENTATION



BOOSTER CLUB QUICK TIPS SHEET



PARENT ORGANIZATION CHECKLIST



TAXABLE SERVICES-TX COMPTROLLER



SCHOOL FUNDRAISER & TX SALES TAX



EXEMPT ORGANIZATIONS SALES &
PURCHASES



SAMPLE 990 EZ



SAMPLE 990 N



Bookmark This Page!

Use these resources throughout the year to help
your booster club or PTO stay organized and compliant.



Exploring a New Resource

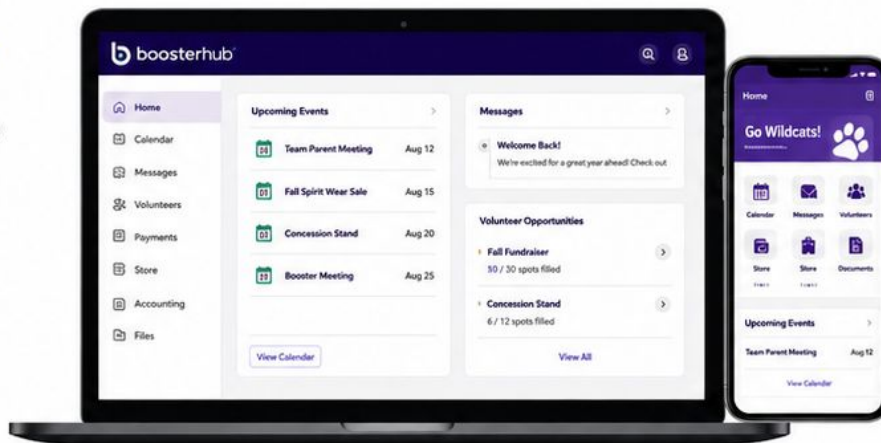


We are exploring BoosterHub as an optional resource that may help organizations operate more efficiently. Before making any recommendations, we'd like to hear your thoughts!

WHAT IS BOOSTERHUB?

BoosterHub is an all-in-one platform designed specifically for school Booster Clubs and PTOs.

It combines the tools organizations use every day into one easy-to-use website and mobile app.



POTENTIAL BENEFITS

- ✓ One place for parents to find information
- ✓ Improves communication between officers and families
- ✓ Simplifies volunteer coordination
- ✓ Provides better continuity when officers change each year
- ✓ Helps organize financial records and documents
- ✓ May reduce the number of separate apps your organization manages

WHAT BOOSTERHUB CAN OFFER



CALENDAR & EVENTS

Publish events, meetings, and important dates.



PARENT COMMUNICATION

Send messages, announcements, and updates to families.



VOLUNTEER SIGN-UPS

Recruit and manage volunteers with easy sign-ups.



ONLINE PAYMENTS & DONATIONS

Collect payments, dues, and donations securely online.



ONLINE STORE & SPIRIT WEAR

Sell spirit wear and products with an online store.



ACCOUNTING & TREASURER TOOLS

Track income, expenses, and generate reports.



FILE STORAGE & DOCUMENT SHARING

Store and share important documents in one secure place.



EVENT TICKET SALES

Sell tickets for events, fundraisers, and more.



MOBILE APP FOR MEMBERS

Stay connected on the go with the BoosterHub app.



WE WANT YOUR FEEDBACK!

Would your organization use a platform like BoosterHub?
What features would be most valuable?
What concerns or questions would you have?
Would this replace tools you're already using?



Your input will help guide the decision!



BoosterHub would not change the independent status of Booster Clubs or PTOs. Organizations would continue to operate under their own officers, bylaws, EIN, and bank accounts while using the software as a management tool.

ANNUAL REQUIREMENTS



Every booster club/PTO must submit these **6 things** to the district on an annual basis:

1



A copy of the organization's bylaws, signed and dated by the president.

2



The name, address, and telephone number of the persons authorized to sign any legal papers, documents.

3



The name, address, and telephone number of all current officers.

4



The name, address, and telephone number of the depository for the organization's funds.

5



A copy of the most recent financial statements.

6



A schedule and/or calendar from the booster club for fundraising activities including location and a brief description.



NEED ASSISTANCE? WE'RE HERE TO HELP!



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Our goal is to partner with and support every Willis ISD
Booster Club and PTO.

*If you have questions, please don't hesitate to reach
out to the appropriate department.*