

Presentation on CVUSD Booster Clubs

March 15, 2023



Purpose

- Provide an overview on booster clubs and parent organizations and their relationship with CVUSD
- Present an overview of the re-authorization process between CVUSD and booster organizations
- Seek input and feedback on potential improvements

Booster Clubs and Parent Organizations

- Booster clubs and parent organizations are formed by parents, community members, and staff members to support school activities (e.g. music groups, athletic teams, debate teams).
- The primary role of a booster club or parent organization is to enrich students' participation in extracurricular school activities.
- Parent organizations and booster clubs are often referred to as “school-connected organizations.” Booster clubs and parent organizations:
 - Are legally separate from the district
 - Are not under the legal control of the Superintendent, Board of Education, site administrators, other district staff or students

CA Education Code 51521

“No person shall solicit any other person to contribute to any fund or to purchase any item of personal property, upon the representation that the money received is to be used wholly or in part for the benefit of any public school or the student body of any public school, unless such person obtains the prior written approval of either the governing board of the school district in which such solicitation is to be made or the governing board of the school district having jurisdiction over the school or student body represented to be benefited by such solicitation, or the designee of either of such boards.”

- A school-connected organization may not legally operate unless and until it obtains the prior written approval of the district’s governing board or its designee.
- Need approval from the governing board in order to raise funds on behalf of the District
- The district governing board should adopt board policies and administrative regulations that booster clubs and parent organizations must follow to operate as a school-connected organization.

Current Process - Orientation

Orientation meeting held at the start of the school year

Information presented:

- Booster Club Handbook Presentation
- Important & required documents/processes for reauthorization
- Facility reservation overview
- General guidance and Q & A

One member of the executive board is required to attend. All members are invited, but Treasurers and Presidents are strongly encouraged to participate.

Current Process - Reauthorization

Reauthorization Packets to be submitted to school by Oct 1st

- Athletics/Activities administrative assistants first reviews for errors
- Athletics/Activities APs reviews and submit to Principal
- Principal approves
- Submit to High School Education for final review no later than November 1st

Current Process - Reauthorization

Key Points:

- Tax ID number
- President's verification of Tax ID
- Executive board contact information
- Annual financial statement
- Annual proposed budget
- Annual audit report
- Proof of booster insurance
- All items on checklists have been addressed in packet



CONEJO VALLEY UNIFIED SCHOOL DISTRICT PARENT SUPPORT/BOOSTER ORGANIZATION APPLICATION FOR REAUTHORIZATION – YEAR 2022/2023

Name of Organization: _____ No. of students served by club _____

Booster Club Taxpayer Identification Number: _____ Club President verified that Booster Club Taxpayer ID provided on this application shows that "Registration Status is Current" on the California State Attorney General's Registry of Charitable Trust website at <http://rct.doj.ca.gov/MyLicenseVerification/Search.aspx?facility=Y> (President, Please Initial)

Current Officers:	NAME	ADDRESS	CITY	ZIP	PHONE
President/Chair:	_____	_____	_____	_____	_____
President's email address:	_____				
Vice-Pres./Chair:	_____	_____	_____	_____	_____
Secretary:	_____	_____	_____	_____	_____
Treasurer:	_____	_____	_____	_____	_____
Treasurer's email address:	_____				

Since the last approval:	YES	NO
Has the organization changed 501c3 status?	_____	_____
Have the audit procedures changed?	_____	_____
Has the Constitution been amended? <i>If yes, please submit updated document</i>	_____	_____
Have the Bylaws been amended? <i>If yes, please submit updated document</i>	_____	_____
Did the organization directly pay wages to anyone since last November?	_____	_____
Will the organization ask the District to hire or pay wages to anyone?	_____	_____
Does the organization have any unpaid debts or loans?	_____	_____

Note: Booster clubs are not permitted to hire or pay wages to anyone directly.

ATTACH the following items and submit to the school principal (CLUBS MUST USE CVUSD FINANCIAL STATEMENT, PROPOSED BUDGET & AUDIT REPORT FORMS provided)

- Annual Financial Statement** for July 1, 2021 through June 30, 2022, including beginning balance, specific actual income & expenses, and ending balance.
- Annual Proposed Budget** for July 1, 2022 through June 30, 2023, including beginning balance, specific projected income & expenses, and ending balance.
- Annual Audit Report**
- Booster Insurance:** must provide Certificate of Insurance.
- Off-season Facilities Plans**
- Booster Club meeting minutes** that document approval of the **Annual Election of Officers, and Proposed Budget (highlighted)**
- One copy of Booster Club's Bylaws** to be submitted to the principal for **on-site filing** (bylaws must specify if all members have voting rights and two signatures are required on all checks issued by the Booster Club)

Current Process - Reauthorization

Prior Year Budget Breakdown

- Discloses the actual spending from the prior year of operation.
- Includes income, fundraising and expenses
- The form must have ALL signatures prior to submission

School Booster Club			
Annual Financial Statement 2021-2022 School Year			
Starting Balance	Date: July 1, 2021		\$0.00
<i>(This Starting Balance should be the 'Total Club Assets Balance' from the prior year's 'Annual Audit Report')</i>			
Income	Income	Expenses	Total
Parent and Family Donations	\$0.00	\$0.00	\$0.00
Private and Business Donations	\$0.00	\$0.00	\$0.00
Program Ads and Sales	\$0.00	\$0.00	\$0.00
Sponsors Signs and Banners	\$0.00	\$0.00	\$0.00
Snack Bar and Food Sales	\$0.00	\$0.00	\$0.00
Fundraiser	\$0.00	\$0.00	\$0.00
Fundraiser	\$0.00	\$0.00	\$0.00
Fundraiser	\$0.00	\$0.00	\$0.00
Banquet Ticket Sales	\$0.00	\$0.00	\$0.00
Bank Savings Account Interest	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00
Expenses			
Uniforms, Jackets, Bags	\$0.00	\$0.00	\$0.00
Equipment (Team & Field)	\$0.00	\$0.00	\$0.00
Equipment (Training & Practice)	\$0.00	\$0.00	\$0.00
Field Repair and Maintenance	\$0.00	\$0.00	\$0.00
Transportation and Bus Expenses	\$0.00	\$0.00	\$0.00
Tournaments and Competitions	\$0.00	\$0.00	\$0.00
Overnight Trip Expenses	\$0.00	\$0.00	\$0.00
Clinics and Camps (Team)	\$0.00	\$0.00	\$0.00
Team Parties and Get-Togethers	\$0.00	\$0.00	\$0.00
Awards and Gifts	\$0.00	\$0.00	\$0.00
Pictures and Videos	\$0.00	\$0.00	\$0.00
Publicity and Media	\$0.00	\$0.00	\$0.00
Bank Charges and Service Charges	\$0.00	\$0.00	\$0.00
Supplies, Postage and Misc. Exp.	\$0.00	\$0.00	\$0.00
*Coaches Pay (Paid to District)	\$0.00	\$0.00	\$0.00
Coaches Training and Certification	\$0.00	\$0.00	\$0.00
Scholarships and Donations	\$0.00	\$0.00	\$0.00
Federal and State Registration Expenses	\$0.00	\$0.00	\$0.00
Banquet Expenses	\$0.00	\$0.00	\$0.00
Other Expense	\$0.00	\$0.00	\$0.00
Other Expense	\$0.00	\$0.00	\$0.00
Other Expense	\$0.00	\$0.00	\$0.00
Other Expense	\$0.00	\$0.00	\$0.00
Other Expense	\$0.00	\$0.00	\$0.00
Total Net Gain or Loss for Year	\$0.00	\$0.00	\$0.00
Closing Balance (Total Club Assets)	Date: June 30, 2022		\$0.00
			(Equals Starting Balance plus/minus Net Gain or Loss)
I, hereby submit this Annual Proposed Budget to the Booster Club for approval:			
Date Completed:	_____ <i>Finance Committee's Signature</i>		
Date Adopted:	_____ <i>Booster Club's Signature</i>		
*Coaches must be paid by District. Ask the Assistant Principal of Athletics at your school for details.			
*Categories must have labels - Do not put Miscellaneous or Other for Income or Expenses over \$1500			
*Loans are not an allowable expense.			

Current Process - Reauthorization

Current Year Proposed Budget Breakdown

- Proposed spending for the upcoming year of operation
- The form must have ALL signatures prior to submission

		School Booster Club	
Annual Proposed Budget 2022-2023 School Year			
Starting Balance	Date: July 1, 2022		\$0.00
<i>(This Starting Balance should be the 'Total Club Assets Balance' from the prior year's 'Annual Audit Report')</i>			
Income		Income	Expense
		Total	
Parent and Family Donations	\$0.00	\$0.00	\$0.00
Private and Business Donations	\$0.00	\$0.00	\$0.00
Program Ads and Sales	\$0.00	\$0.00	\$0.00
Sponsors Signs and Banners	\$0.00	\$0.00	\$0.00
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Fundraiser	\$0.00	\$0.00	\$0.00
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Expenses			
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	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00
Total Net Gain or Loss for Year	\$0.00	\$0.00	\$0.00
Closing Balance (Total Club As)	Date: June 30, 2023		\$0.00
<i>(Equals Starting Balance plus/minus Net Gain or Loss)</i>			
I, hereby submit this Annual Proposed Budget to the Booster Club for approval:			
Date Completed:		<i> Treasurer's Signature</i>	
Date Adopted:		<i> President's Signature</i>	
Coaches must be paid by District. Ask the Assistant Principal of Athletics at your school for details.			
*Categories must have labels - Do not put Miscellaneous or Other for income or expenses over \$1500			
Loans are not an allowable expense.			

Current Process - Reauthorization

Prior Year Audit Report

- Form must be completed by a third party auditor
- Amounts and balances must match per the document
- Form must have ALL signatures prior to submission

School
Booster Club

**Annual Audit Report
2021-2022 School Year**

CHECKBOOK

BALANCE in Checkbook on:	Date: July 1, 2021	\$0.00
Deposits / Receipts / Transfers in / Interest, total last year:		\$0.00
Withdrawals / Checks / Transfers out / Charges, total last year:		\$0.00
BALANCE in Checkbook on:	Date: June 30, 2022	\$0.00

Bank Statement Reconciliation

BALANCE in Checking per Statement at year end:	Date: June 30, 2022	\$0.00
Deposits Outstanding, not yet credited:		
Checks: \$0.00	Cash: \$0.00	Total Deposits: (add) \$0.00
Checks Outstanding, not yet cashed:		
# \$0.00	# \$0.00	# \$0.00
# \$0.00	# \$0.00	# \$0.00
# \$0.00	# \$0.00	Total Checks: (subtract) \$0.00
Adjusted Bank Statement Balance*	Date: June 30, 2022	\$0.00

* Must match Checkbook Balance

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SAVINGS ACCOUNT

BALANCE in Account at beginning of last year:	Date: July 1, 2021	\$0.00
Deposits / Transfers in / Interest, total last year:		\$0.00
Withdrawals / Transfers out / Charges, total last year:		\$0.00
BALANCE in Account at the end of last year:	Date: June 30, 2022	\$0.00

TOTAL BANK ASSE Checkbook and Savings Accounts Total: \$0.00

OTHER CLUB ASSE Undeposited Checks and Cash on hand:

Checks: \$0.00	Cash: \$0.00	Other: \$0.00	\$0.00
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TOTAL CLUB ASSE Bank and Other Date: June 30, 2022 \$0.00

Total includes amounts in:
checkbook, savings, 401k,
cash, receipt, etc.

CERTIFICATION: (Initials, Signatures, Dates, and Phone Number are Required)

As official Auditor, together with one or more other official Board Members:

I have reviewed the above Bank Account information and find it to be correct: Yes: _____

I have reviewed all checks written against their receipts and find them to be correct: Yes: _____

I have reviewed all deposits, cash and other accounting and find them to be correct: Yes: _____

I, hereby submit this Annual Audit Report to the Booster Club for approval:

Auditor's Signature: _____
Date Completed: _____

President's Signature: _____
Date Adopted: _____

* Auditor cannot be an officer of the booster club nor related to a booster club officer.

Communication and Collaboration

Regular booster meetings provide an opportunity for updates by each booster organization. A time to plan, organize, answer questions, and/or troubleshoot any issues together.

Points of contact at the school sites: Assistant Principals of Athletics or Activities

Boosters contact sites, as needed, with questions such as:

- Calendar dates
- Potential conflicts of events
- Guidance with facilities reservations
- Promoting upcoming events/fundraisers
- Coaching stipends

Role of the district to create consistent structures and supports.

Planned Improvements

- Additional meetings with boosters and school site administrators during the year to provide information, share practices and support transitioning year-to-year
- Frontload the reauthorization forms to incoming booster members in late spring, and providing exemplars to serve as a guide
- Redesign reauthorization process to be more effective and user friendly
- Communicate Fiscal Crisis & Management Assistance Team (FCMAT) “Best Practices Guide” to all booster organizations

Questions?