



ZAPATA COUNTY ISD PARENT TEACHER ORGANIZATION GUIDELINES MANUAL

Revised 02.12.2016



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This document summarizes the Zapata County Independent School District's ("District") administrative procedures relative to parent organizations. It is not intended to be all inclusive. If there is conflict between the information presented here and the District's Board Policy, the Board Policy shall take precedence.

Foreword

Zapata County Independent School District Parent Teacher Organization Guideline Manual.

The Finance Department of Zapata County Independent School District compiled the Parent Organization Guidelines to assist parent organizations in meeting District, University Interscholastic League (UIL), state and federal requirements. The information in this handbook is provided to assist parent organizations/booster clubs in following pertinent policies and regulations and to provide guidance in establishing a general record-keeping system and a general system of internal controls. Establishing a good record-keeping system is an essential step in creating a successful organization.

The contents of this document set forth the District's administrative guidelines and procedures for parent organizations. Only approved organizations operating under these parent group procedures and guidelines and the District's policy GE Legal and Local shall be allowed to use the school name and/or facilities in support of its programs.

Important: The District Finance Department is not an authority on specific accounting situations or tax-related issues concerning individual parent organizations; therefore, parent organizations should obtain competent independent counsel on accounting and tax matters related to their specific requirements.

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1 General Information

The District encourages full participation and involvement of parents in the education of their children through their involvement in voluntary parent organizations such as PTAs, PTOs, and Booster Clubs that may be formed to promote the school program or to complement a particular student group or activity.

District-affiliated school-support or booster organizations shall organize and function in a way that is consistent with the District's goals, philosophy and objectives. Further, these organizations shall operate as dictated by adopted Board policies, applicable UIL guidelines and the District's approved Parent Organization Guidelines. (See Board Policy GE Legal and Local)

Parent organizations are a separate entity from the school District, even though they generally exist solely to support activities of the school or student groups.

The superintendent or designee has the authority to revoke the recognition of the school or student group or disallow the continued association of any school program/group with a parent or community organization that has been judged to be disruptive to the educational activities or goals of the program/group, or fails to comply with board policy and these guidelines.

The purpose of these guidelines is to establish procedures and directives that govern and promote proper standards, duties, ethics, discipline, efficiency, conduct, and public relations, which are necessary for the safety and welfare of District property, its students, employees and the general public.

2 Administrative Guidelines

Officers - A current listing of officers and designated check signers for each parent organization shall be submitted annually to the campus principal. This information should remain on file in the principal's office at all times. Any changes that occur during the year should also be submitted to the campus principal. The principal may not hold an office in their campus' parent organization.

Meetings - The business of the parent organization shall be conducted in an open meeting, with notification of all meetings provided to the membership and scheduled thru the campus principal. Minutes of all meetings shall be kept in writing.

Minutes and Treasurer's Report - The minutes of the last meeting and the treasurer's report shall be reported at each regularly scheduled meeting.

Information to Principal - The minutes, treasurer's report, copy of bank statement and bank reconciliation shall be provided monthly to the campus principal.

Liaison – The District liaison with any parent organization affiliated with the school shall be the Coordinator of At-Risk and Parental Involvement. If an organization is affiliated with a specific student group, the faculty sponsor of such student group may be designated by the principal to act as liaison. The liaison shall adhere to the following rules:

- Work with such organizations to establish approved goals and student support activities for the respective organizations;
- Ensure that lists of officers of the respective parent organizations are filed with the school principal at the beginning of each school year, and that such lists are revised as officers change during the school year;
- Ensure that lists of parent organization activities for the coming year are submitted to the campus principal at a date established by the campus principal.

2.1 Accounting and Financial Management Guidelines

- a. The officers of the parent organization shall be responsible for proper administration of their funds including accounting, safeguarding and disbursement of funds in accordance with federal and state law and local board policies.
- b. Accounting records shall be limited at all times to only those persons whose duties require access.
- c. Each parent organization must have its own bank account with its own federal identification number. Parent organization money must be kept separate from school funds. School funds are public monies and parent organization funds are private monies.
- d. The financial records for the parent organization must be balanced monthly. This includes a monthly bank reconciliation and review of outstanding checks and deposits in transit.
- e. The minutes of the last meeting and the treasurer's report shall be reported at each regularly scheduled meeting.
- f. The minutes, treasurer's report, bank statement copy and bank reconciliation shall be provided monthly to the campus principal.
- g. An annual financial report summarizing all receipts and expenses shall be made to the general membership and the District's Department of Finance at the end of the school year, generally May of each year. A copy shall be provided to the campus principal.
- h. Bank statements shall be mailed to the official mailing address of the parent organization. This could be the school's address or a P.O. Box.

2.1.1 Receipts

- a. Cash receipts shall be issued for all money received. The original shall be given to the payee and the copy kept in the receipt book. All copies of voided cash receipts shall be kept in the receipt book.
- b. Funds shall be counted at the event site, with at least two people present.
- c. All funds received shall be deposited into the parent organization's bank account timely (the next business day) to reduce the risk of loss or theft.
- d. The cashing of checks from cash receipts or petty cash is prohibited.
- e. Cash received shall not be used for any purchases; all purchases shall be made with a check.

2.1.2 Disbursements

- a. All disbursements shall be made by pre-numbered checks from the organization's bank account.
- b. Debit cards shall not be used to make purchases or to withdraw funds from the account. This does not document that at least two individuals are authorizing the purchase as noted on item below. (see 2.1.2(e))
- c. "Blank Checks" or checks payable to "Cash" shall not be issued.
- d. Original invoices shall be provided as support for all payments made by check. These shall be retained and filed in check sequence.

- e. The checks shall be signed by two officers, usually the president and the treasurer. Individuals authorized to sign checks shall not be related to each other by marriage or any other relationship.
- f. No District employee shall be an authorized check signer of a parent or booster organization.

2.1.3 Other Financial Responsibilities

- a. Parent organizations are fully responsible for all taxes, debts, and other financial commitments incurred by the organization.
- b. Parent organizations do not have the authority to commit or to represent in any way that the District is responsible for any of its financial or contractual obligations.
- c. Parent organizations shall not use the District's Federal Identification Number for conducting business of the organization.
- d. Parent organizations shall establish a permanent file of financial records, bank statements, tax records, etc. This file shall be transferred to successive administrations of the organization each year.
- e. Funds accounted for by parent organizations are not District funds and are, therefore, not subject to bookkeeping by District employees. The bookkeeping responsibilities for such funds are to be handled by officers of the parent organizations.
- f. School employees shall not accept loans of funds from parent organizations.
- g. Organizational by-laws shall include provisions for disposal of funds and/or property to the District in case said organization disbands or ceases to operate.

2.2 Fundraising Guidelines

- a. Parent organizations shall conduct fundraising activities to benefit the entire student group and activities.
- b. All parent organization fundraising efforts shall be within federal, state and District guidelines and shall be for the purpose of supporting the school program or group activity for which the organization was formed.
- c. All fundraising activities require prior approval from the principal and the designated District liaison. The Fundraiser Application (see attachment) shall be used to document written approval from the principal and the designated District liaison.
- d. The profitability of the fundraiser shall be documented. The Fundraiser Application may be completed after the fundraiser to document profitability of fundraiser.
- e. Fundraising activities may be held using Campus facilities, in accordance with District policies. Campus facilities desired for use shall be scheduled through the campus principal.
- f. Students are not allowed to participate in bucket brigades. Bucket brigades entail the collection of money at busy intersections. Our students' safety is of the utmost concern and this is a very dangerous practice.
- g. Raffles and bingos are **not allowed on district property**. Refer to District policy GKB (Legal) for additional guidance.

2.3 Other Responsibilities

- a. Parent organizations shall assume liability and hold the District harmless for any and all personal injuries or property damage arising from their activities.

2.4 Donations - Monetary or Tangible Property

The District welcomes the donation of funds or tangible property to schools and student organizations.

- a. Any parent organization project that involves changes of any kind to the interior or exterior of buildings, structural or site improvements, including grounds, must be approved by the District's facilities department. The parent organization shall work with the Principal and appropriate District staff in obtaining the necessary approvals.

3 UIL Booster Club Guidelines

Booster Clubs that support a UIL sanctioned group should obtain the pamphlet "Booster Club Guidelines" published annually by the University Interscholastic League (UIL) and available online at www.uil texas.org/policy/booster-club-guidelines to be aware of the current procedures regarding extracurricular activities.

This document provides guidelines which govern all booster club activities related to UIL-sponsored competition. Since the UIL regulates and governs what participants, sponsors, and coaches may and may not accept, it is very important booster club members and parents are aware of these guidelines.

The UIL Parent Information Manual is another useful document that can be found at www.uil texas.org/athletics/manuals

Note: In addition to the District P.T.O. Guidelines Manual, the District will adhere to the UIL Booster Club Guidelines. Reference Section 3(1), (2), (3), (4), (5) and (6).

3.1 Written Policies

Booster clubs should develop and annually review policies to cover:

1. how to obtain administrative approval before beginning projects;
2. how to plan and publicize meetings;
3. bookkeeping and fund administration including process to obtain superintendent's approval prior to raising or spending funds;
4. election of officers (suggestion: one president; one secretary; one treasurer; and three vice - presidents: one vice president to oversee fall, winter and spring sports);
5. taking, distributing and filing minutes;
6. public communication;
7. proper interaction with fine arts directors and academic and athletic coaches through the lines of authority as established by the school board;
8. a sportsmanship code governing behavior of booster club members and fans at contests, treatment of officials, guests, judges, etc.; and
9. plans to support the school regardless of success in competition, keeping the educational goals of competition at the forefront of all policies.

3.2 Relationship with the school

The superintendent or a designee who does not coach or direct a UIL contest has approval authority over booster clubs and should be invited to all meetings. All meetings should be open to the public.

1. Booster clubs do not have authority to direct the duties of a school district employee. The scheduling of contests, rules for participation, methods of earning letters and all other criteria dealing with inter-school programs are under the jurisdiction of the local school administration.
2. Minutes should be taken at each meeting and kept on file at the school.
3. School administration should apprise booster clubs of all school activities.
4. Booster clubs should apprise school administrators of all club activities.
5. Periodic financial statements itemizing all receipts and expenditures should be made to the general club membership and kept on file at the school.

3.3 Athletic Booster Club restrictions

Booster clubs cannot give anything to students, including awards. Schools must give prior approval for any banquet or get-together given for students.

1. Athletic booster club funds shall not be used to support athletic camps, clinics, private instruction or any activity outside of the school.
2. Booster groups or individuals may donate money or merchandise to the school with prior approval of administration. It is a violation for booster groups or individuals to pay for costs directly.
3. The penalty to a student-athlete is forfeiture of varsity athletic eligibility in the sport for which the violation occurred for one calendar year from the date of the violation. Student athletes are prohibited from accepting valuable consideration for participation in school athletics - anything that is not given or offered to the entire student body on the same basis that it is given or offered to an athlete. Valuable consideration is defined as tangible or intangible property or service including anything that is usable, wearable, salable or consumable.
4. The school may provide meals for contests held away from the home school. If the school does not pay for meals, the individual parents need to purchase their own child's food. Parents may purchase anything they wish for their own child but may not provide food for their child's teammates unless approved by the school. The school may also provide supplies for games and

practices and transportation for school field trips. Students should pay admission fees during school field trips.

3.4 Official Interpretation of the UIL Athletic Amateur Rule, section 441 of the UIL Constitution and Contest Rules:

(a) VALUABLE CONSIDERATION SCHOOL TEAMS AND ATHLETES MAY ACCEPT:

1. Pre-Season. School athletic teams may be given pre-season meals, if approved by the school.
2. Post-Season. School athletic teams may be given post-season meals if approved by the school. Banquet favors or gifts are considered valuable consideration and are subject to the Awards and Amateur Rules if they are given to a student athlete at any time.
3. Other. If approved by the school, school athletic teams and athletes may be invited to and may attend functions where free admission is offered, or where refreshments and/or meals are served. Athletes or athletic teams may be recognized at these functions, but may not accept anything, other than food items, that is not given to all other students.

(b) ADDITIONAL VALUABLE CONSIDERATION THAT SCHOOL TEAMS AND ATHLETES MAY ACCEPT

Examples of additional items deemed allowable under this interpretation if approved by the school, include but are not limited to:

1. meals, snacks or snack foods during or after practices;
2. parties provided by parents or other students strictly for an athletic team

The District superintendent has the discretion to allow student athletes to accept small “goodie bags” that contain candy, cookies or other items that have no intrinsic value and are not considered valuable consideration.

3.5 Academic Booster Club restrictions

Academics has no amateur rule. UIL academic students are restricted by the Awards Rule. Booster clubs shall not give gifts or awards to students for their participation in UIL contests that count toward district, region or state standing.

3.6 Music Booster Club restrictions

In addition to the general procedures outlined, the following guidelines apply to Music Booster Club activities.

1. Some music booster clubs assist with expenses for travel to various music-related activities such as UIL contests and performances at away athletic events. Such financial support violates no UIL rules provided that it is approved and coordinated by the local school district.
2. Booster Clubs may also fund scholarships for private lessons and summer music camps provided the selection of the recipients is not based on success in interscholastic competition. Funds for such activities should be carefully monitored to ensure that they are expended for educational rather than recreational activities.
3. The awarding of patches, T-shirts or other items for achievement in interscholastic competition would be subject to the UIL Awards Rule. In order to protect all music students' eligibility, such awards should be approved and administrated by the local school district in accordance with school district policies.

Zapata County ISD
253901

RELATIONS WITH PARENT ORGANIZATIONS

GE
(LEGAL)

PARENT-TEACHER
ORGANIZATIONS

The Board shall cooperate in the establishment of ongoing operations of at least one parent-teacher organization at each school in the District to promote parental involvement in school activities.
Education Code 26.001(e)

DATE ISSUED: 7/1/2002
UPDATE 68
GE(LEGAL)-P

1 of 1

RELATIONS WITH PARENT ORGANIZATIONS

GE
(LOCAL)

District-affiliated school-support or booster organizations shall organize and function in a way that is consistent with the District's philosophy and objectives, within adopted Board policies, in accordance with applicable UIL guidelines and financial and audit regulations. [See also CFD]

USE OF DISTRICT
FACILITIES

District-affiliated school-support or booster organizations may use District facilities with prior approval of the appropriate administrator. Other parent groups may use District facilities in accordance with policy GKD.

PURCHASES FOR THE
SCHOOL

Before parent groups or other groups working with the school purchase equipment for the schools, including computer hardware and software, they shall notify the principal of their plans. In consultation with the Superintendent or designee, the principal shall determine the type or brand of equipment to buy to ensure compatibility with current District equipment.

DATE ISSUED: 7/22/2004
UPDATE 73
GE(LOCAL)-A

ADOPTED:

1 of 1



ZAPATA COUNTY INDEPENDENT SCHOOL DISTRICT

Parent Organization Information Sheet

Submit to your campus principal and District Liaison at the beginning of the school year or as information changes.

- 1. Parent Organization/Booster Club Name: _____
- 2. Sport or Activity Represented: _____
- 3. School Name: _____
- 4. Employer Identification Number (EIN): _____
- 5. Official Mailing Address: _____

6. Parent Organization/Booster Club Officers for the _____ School Year:

Office Held:	Name:	Mailing Address:	Phone Number:	Authorized Check Signer Y or N
President				
Vice-President				
Secretary				
Treasurer				

7. Planned Fundraising Activities for the year:

Fundraiser	Planned Dates



ZAPATA COUNTY INDEPENDENT SCHOOL DISTRICT

Fundraiser Application for District Affiliated Parent Organizations

All fundraising, promotional activities and/or general solicitation for charitable contributions sponsored by booster organizations must receive prior approval from the Superintendent or designee. In accordance with GE (LOCAL), the campus principal is the designee for all campus affiliated organizations unless otherwise noted.

Name of organization: _____

Intended Fundraising Project: _____

Duration of Fundraising Effort: (time-frame that solicitation or sale will occur): _____

Goal of Fundraising efforts: (Why is the money being raised? The goal can be general or specific, but comply with the terms of GE (Legal and Local) and all other local, state and federal laws, regulations or policies):

PTO President or Designee Signature

Date

Campus Principal Signature

Date

District PTO Liaison Signature

Date

Treasurer Signature

Date

Bylaws for
TEMPLATE
(Campus PTO / Booster Club Name)

I – Name

The name of the organization shall be the **ABC Elementary PTO, Inc.**

II – Purpose

The corporation is organized for the purpose of supporting the education of children at **ABC Elementary** by fostering relationships among the school, parents, and teachers.

III – Members

Section 1.

Any parent, guardian, or other adult standing in loco parentis for a student at the school may be a member and shall have voting rights. The principal and any teacher employed at the school may be a member and have voting rights.

IV – Officers and Elections

Section 1.

Officers. The officers shall be a president, vice president, secretary, and treasurer.

- a) **President.** The president shall preside over meetings of the organization and executive board, serve
- b) as the primary contact for the principal, represent the organization at meetings outside the organization, serve as an ex officio member of all committees except the nominating committee, and coordinate the work of all the officers and committees so that the purpose of the organization is served.
- c) **Vice President.** The vice president shall assist the president and carry out the president's duties in his or her absence or inability to serve.
- d) **Secretary.** The secretary shall keep all records of the organization, take and record minutes, prepare the agenda, handle correspondence, and send notices of meetings to the membership. The secretary also keeps a copy of the minutes book, bylaws, rules, membership list, and any other necessary supplies, and brings them to meetings.
- e) **Treasurer.** The treasurer shall receive all funds of the organization, keep an accurate record of receipts and expenditures, and pay out funds in accordance with the approval of the executive board. He or she will present a financial statement at every meeting and at other times of the year when requested by the executive board, and make a full report at the end of the year.

Section 2.

Nominations and Elections. Elections will be held at the second to last meeting of the school year. The nominating committee shall select a candidate for each office and present the slate at a meeting held one month prior to the election. At that meeting, nominations may also be made from the floor. Voting shall be by voice vote if a slate is presented. If more than one person is running for an office, a ballot vote shall be taken.

Section 3.

Eligibility. Members are eligible for office if they are members in good standing at least 14 calendar days before the nominating committee presents its slate.

Section 4.

Terms of Office. Officers are elected for one year and may serve no more than two (2) consecutive terms in the same office. Each person elected shall hold only one office at a time.

Section 5.

Vacancies.

If there is a vacancy in the office of president, the vice president will become the president. At the next regularly scheduled meeting, a new vice president will be elected. If there is a vacancy in any other office, members will fill the vacancy through an election at the next regular meeting.

Section 6.

Removal From Office. Officers can be removed from office with or without cause by a two- thirds vote of those present (assuming a quorum) at a regular meeting where previous notice has been given.

V – Meetings

Section 1.

Regular Meetings. The regular meeting of the organization shall be on the first Tuesday of each month during the school year at 7 p.m., or at a time and place determined by the executive board at least one month before the meeting. The annual meeting will be held at the April regular meeting. The annual meeting is for receiving reports, electing officers, and conducting other business that should arise. The secretary will notify the members of the meetings in a flyer sent home with the students at least one week prior to the meeting.

Section 2.

Special Meetings. Special meetings may be called by the president, any two members of the executive board, or five general members submitting a written request to the secretary. Previous notice of the special meeting shall be sent to the members at least 10 days prior to the meeting, by flyer and phone calls.

Section 3.

Quorum. The quorum shall be 10 members of the organization.

Reminder: It's a good practice to give notice of all meetings. Some states require a minimum notice prior to a meeting, but not usually for meetings held on the same day and at the same time each month (i.e., your regular monthly meetings).

VI – Executive Board

Section 1.

Membership. The Executive Board shall consist of the officers, principal, and standing committee chairs.

Section 2.

Duties. The duties of the Executive Board shall be to transact business between meetings in preparation for the general meeting, create standing rules and policies, create standing and temporary committees, prepare and submit a budget to the membership, approve routine bills, and prepare reports and recommendations to the membership.

Section 3.

Meetings. Regular meetings shall be held monthly, on the same day and at the same time each month, to be determined by the board. Special meetings may be called by any two board members, with a 24 hour notice.

Section 4.

Quorum. Half the number of board members plus one constitutes a quorum.

Reminder: Most states prohibit boards of directors from voting by proxy, mail, or email ballot unless the decision is made in writing and is unanimous. The thinking is that boards should meet and confer before making decisions, unless all board members agree.

VII – Committees

Section 1.

Membership. Committees may consist of members and board members, with the president acting as an ex officio member of all committees.

Section 2.

Standing Committees. The following committees shall be held by the organization: Fundraising, Hospitality, Membership, Communications, Arts and Enrichment, Family Events, Nominating, and Auditing.

Section 3.

Additional Committees. The board may appoint additional committees as needed.

VIII – Finances

Section 1.

A tentative budget shall be drafted in the fall for each school year and approved by a majority vote of the members present.

Section 2.

The treasurer shall keep accurate records of any disbursements, income, and bank account information. Monthly treasurer's reports should be presented to the parent group members.

Section 3.

The board shall approve all expenses of the organization.

Section 4.

Two authorized signatures shall be required on each check. Authorized signers shall be the president, treasurer, and principal.

Section 5.

The treasurer shall prepare a financial statement at the end of the year.

Section 6.

Upon the dissolution of the organization, any remaining funds should be used to pay any outstanding bills and, with the membership's approval, spent for the benefit of the school.

Section 7.

The fiscal year shall coordinate with the school year.

Reminder: State laws often dictate what records must be made available to an organization's members and to the general public at the school. Also, federal law requires that a nonprofit tax-exempt organization's annual information returns (IRS for 990 or 990EZ) for the most recent three years be available for the public review when requested.

IX – Parliamentary Authority

Robert's Rules of Order shall govern meetings when they are not in conflict with the organization's bylaws. Reference <http://www.robertsrules.org/> for more guidance.

X – Standing Rules

Standing rules may be approved by the Executive Board, and the secretary shall keep a record of the standing rules for future reference.

XI – Dissolution

The organization may be dissolved with previous notice (14 calendar days) and a two-thirds vote of those present at the meeting. Reminder: include provisions for the disposal of funds and/or property to the District.

XII – Amendments

These bylaws may be amended at any regular or special meeting, providing that previous notice was given in writing at the prior meeting and then sent to all members of the organization by the secretary. Notice may be given by postal mail, e-mail, or fax. Amendments will be approved by two-thirds vote of those present, assuming a quorum.

Bylaws TEMPLATE is available for download in Word format. Visit www.zcisd.org, under Parents and Student Section.