



# PTA/PTO and Booster Club Sanctioning

## Enter your Name and Organization & EMAIL in the Chat Box

September 22, 2020

### **Español**

Por favor indique su nombre y organización en el cuadro de conversación/ventanilla de charla (*chat box*) También correo electrónico.

Si desea escuchar esta presentación en Español, manténgase en el zoom, silencie la pantalla del zoom y por teléfono, marque 1-302-202-1108 y después marque el código de la conferencia 296278



**TO VIEW A RECORDING OF THIS  
PRESENTATION (*from Sept-22-2020*), copy  
& paste the link to your browser**

***Do not click on the link, copy & paste the  
entire link:***

**[https://tulsaschools-org.zoom.us/rec/share/Zlbej6BwonKoWCs7C2W7D3XVYbHdQAkhMaEQ  
MO\\_UA-oHHt6CeQJLsfNKFfgPONqz.AsJtxbsHKK9w4ySh?startTime=1600817669000](https://tulsaschools-org.zoom.us/rec/share/Zlbej6BwonKoWCs7C2W7D3XVYbHdQAkhMaEQMO_UA-oHHt6CeQJLsfNKFfgPONqz.AsJtxbsHKK9w4ySh?startTime=1600817669000)**

**Enter passcode:  
*FY20-21 Sanctioning***



## Our District's Context





## OUR STUDENTS

 **39,105**  
**STUDENTS**

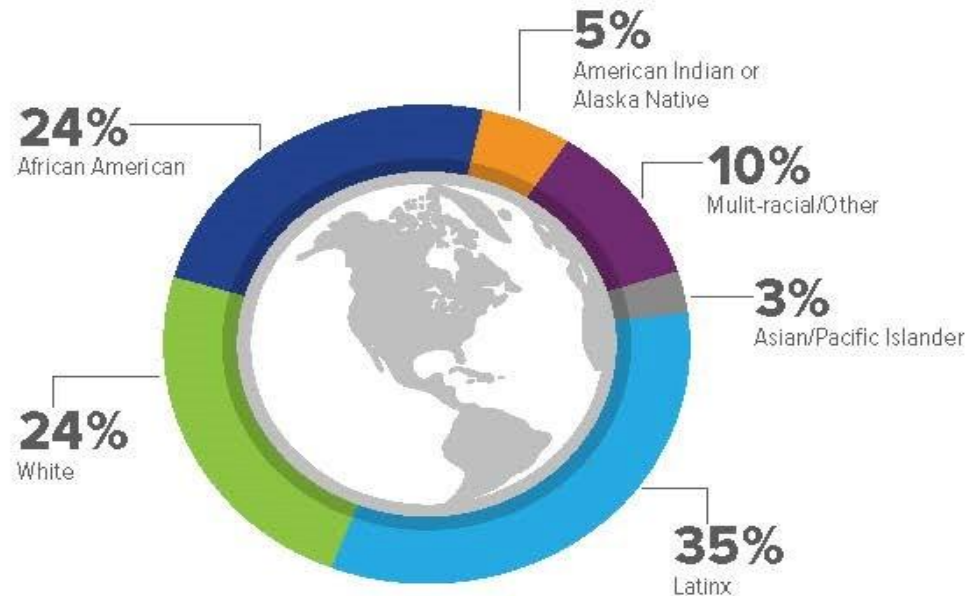
OUR STUDENTS COME FROM **65+** COUNTRIES AND  
SPEAK **70+** DIFFERENT LANGUAGES AND DIALECTS.

### ENROLLMENT\*

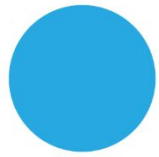
Pre-kindergarten students	2,627
Elementary students	19,922
Junior high and middle school students	5,250
High school students	8,721
District-authorized charter students	2,585
<b>TOTAL ENROLLMENT</b>	<b>39,105</b>

Economically disadvantaged	83%
Multilingual learners	22%
Gifted and talented	12%
Students with disabilities	19%

### RACIAL/ETHNIC DISTRIBUTION\*







# What is the context in which your support further helps our students...

Neighborhood Factors	How does this impact Tulsa Public Schools students?	What does this mean for our larger Community?
Mobility	2 out of 10 students experience mobility during the school year	Tulsa has the 11th highest eviction rate in the country
Life Expectancy	9 out of 10 students live in neighborhoods with life expectancy below the national average	Oklahoma has the fourth lowest life expectancy at birth in the nation
Trauma & Economic Hardship	3 out of 10 students live in neighborhoods with median household incomes below \$30,000	Oklahoma has the largest percent of youth with 3 or more adverse childhood experiences
Education	9 out of 10 students live in neighborhoods where fewer adults have a college degree than the county average	Only 1 out of 4 adults in Oklahoma have a bachelors degree or higher
Community Access	4 out of 10 students live more than a mile away from a grocery store with fresh produce	Oklahoma has the 7th highest rate of child food insecurity



# Sanctioning Guidelines

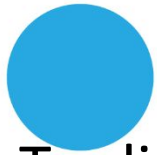
*...and a reminder, if you haven't done so yet,  
Enter your Name, email and Organization in the  
Chat Box*

## *Español*

Por favor de indique su nombre y organización en el  
cuadro de conversación (chat box).

Si desea escuchar esta presentación en Español,  
manténgase en el zoom, silencie la pantalla del zoom y por  
teléfono, marque 1-302-202-1108 y marque el código de la  
conferencia 296278





## Why are we here?

- To discuss school board policy and regulations related to sanctioned groups.
- Oklahoma law allows school boards to adopt policies that exempt specific organizations from the statutory controls of the school activity funds.
- District policy protects the sanctioned group as well as the district by setting out the requirements and expectations of each party. And insures a separation between the district and the organization.
- Review financial reporting obligations
- Take a closer look at athletic booster clubs



## What are the two types of organizations?

*Organizations must operate in accordance with one of two classifications:*

### Not Sanctioned

- Must operate through the district's student activity fund
- Collect and deposit all revenue in the student activity fund
- All expenditures must be made through the student activity fund

### Sanctioned

- Operates outside the student activity fund
- Board of Education authorizes all sanctioned organizations
- Must apply to be sanctioned on an annual basis





## What is Board Policy 5707?

- Establishes the guidelines for district sanctioned organizations
- States that student achievement programs, Parent-Teacher Associations and Booster Clubs are eligible for sanctioning
- States organizations must comply with state and federal laws as well as board policy and administrative regulations
- States the Board of Education can revoke the sanctioned status of an organization if it is determined that the operation or purpose is not consistent with Board policies or procedures.



What is required to become a sanctioned organization?

- Regulation 5707-R specifies what organizations must do as a sanctioned organization:
  - Complete an application form annually that includes information about the organization including purpose, goals, sponsor and statement of nondiscrimination
  - Provide a copy of the organizations by-laws and/or constitution if applying for the first time.



What is required to become a sanctioned organization?

- First timers also need to submit a copy of the confirmation letter from the IRS when you were issued your EIN (*Employer Identification Number/Federal Tax ID Number*)
- Must specify President and Treasurer of the organization and include valid emails
- These officers can not be district employees
- Must obtain the signature of the principal.



What other documentation must be included with the application?

Organizations are required to provide the following documentation:

- Annual financial report as of June 30, 2020 – please use the form provided in the TPS packet
- Bank statement dated June 30, 2020 confirming reconciliation with the financial report
- Description of organizations membership requirements and dues schedule
- Description of planned fund raising



What happens after I turn in my application and required documents?

- Office of the CFO reviews all applications and related documents
- Recommendation made to the board to approve sanctioned statuses
- Notification sent to the organization that board has approved their sanctioned status.





What else do I need to know?

- Organization can **NOT** pay any district employee. All pay must go through the district's payroll
- Superintendent or board could request an audit by an independent accounting firm
- District can request that the organization provide all financial records
- Organization can not deposit any checks, warrants or money orders made payable to the District or individual school into the organization's account
- May not use the district's tax ID number



## What else do I need to know?

- Officers, members or employees of the organization are not permitted to receive monetary bonuses, stipends, non-cash assets or administrative fees
- If the organization is abolished, ceases to exist or is no longer sanctioned, the remaining funds shall be deposited into the school's Student Activity Fund
- Applications are due by October 1<sup>st</sup>, but can be turned in anytime after July 1<sup>st</sup> (need that June 30<sup>th</sup> bank statement)
- Submit application and related documents to Dawn Hamilton: [hamilbe@tulsaschools.org](mailto:hamilbe@tulsaschools.org)



## Other advice?

- As leadership changes in the organization please pass along information to the new officers. This is critical for the treasurer position.
- Beginning balance on the financial statement must equal the ending balance submitted on the financial statement for the prior year.



What if I have questions?

*When in Doubt, ask your Principal  
Or*

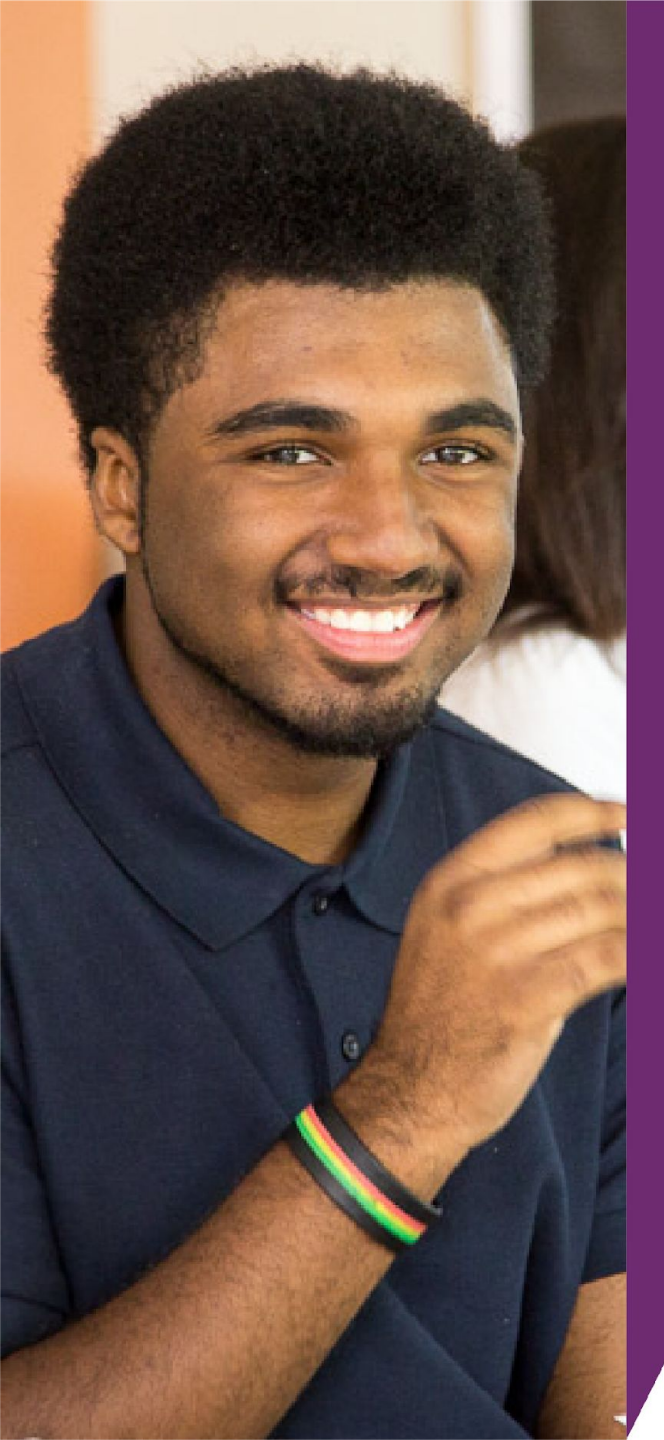
*Contact the TPS Finance Office as 918.746.6247*

Dawn Hamilton, Exec Admin Assistant [hamilbe@tulsaschools.org](mailto:hamilbe@tulsaschools.org)

Joe Stoeppelwerth, Treasurer [stoepjo@tulsaschools.org](mailto:stoepjo@tulsaschools.org)

Gil Cloud, Athletic Director, [cloudgi@tulsaschools.org](mailto:cloudgi@tulsaschools.org)

Mick Wilson, Deputy Director of Athletics, [wilsomi2@tulsaschools.org](mailto:wilsomi2@tulsaschools.org)



# Accounting Practices TREASURER

***...and a reminder, if you haven't done so yet,  
Enter your Name and Organization in the Chat  
Box***

***Español***

***No se le olvide indicar su nombre y organización en el  
cuadro de conversación (chat box).***

***Si desea escuchar esta presentación en Español,  
manténgase en el zoom, silencie la pantalla del zoom y  
por teléfono, marque 1-302-202-1108 y marque el código  
de la conferencia 296278***







## Role of the Treasurer

- Your role is important with a lot of responsibility
- It is critical that you keep accurate records
- **Poor record keeping creates operational problems and puts the reputation of the organization and yourself at risk.**



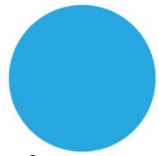
## Duties of the Treasurer

- Keep a full and accurate account of receipts and expenditures
- Make timely deposits
- Make disbursements as authorized by the organization
- Present a financial statement at each meeting
- Prepare or have prepared an annual financial reconciliation report

**Tulsa Public Schools**  
**Statement of Revenues and Expenditures**

	Description	Income	Expenses	Balance
30-Jun-20	Ending Balance			1,000.00
2-Sep-20	Fundraiser - T-shirt Sales	480.00		1,480.00
3-Sep-20	Concession Sales	200.00		1,680.00
4-Sep-20	Member Dues	1,250.00		2,930.00
5-Sep-20	Reimburse Mr. Jones for car wash supplies. Reciepts attached		112.58	2,817.42
6-Sep-20	Concession stand supplies and candy- Sams		314.21	2,503.21
9-Sep-20	Fundraiser - We Design T-Shirts		325.00	2,178.21
10-Sep-20	Fundraiser-Car wash	600.00		2,778.21
13-Sep-20	Concession Sales	175.00		2,953.21
15-Sep-20	Donation- Pass the hat for uniforms	75.00		3,028.21
19-Sep-20	Uniforms -Teamsports.com		2,746.39	281.82
21-Sep-20	Donation - Mrs. Smith	200.00		481.82
24-Sep-20	Concession Sales	175.00		656.82
29-Sep-20				656.82
30-Sep-20	Bank Interest	.08		656.90

XYZ Parent Organization			
Bank Reconciliation			
For the Month Ending	September 30, 2020		
Ending Balance per bank statement		\$ 481.90	
Deposits in transit		\$ 175.00	
Outstanding checks		\$ -	
Reconciled Bank Balance @ month end		\$ 656.90	
Balance per check book @ month end		\$ 656.82	
Adjustments:			
+Interest		\$ 0.08	
-Bank charges		\$ -	
+/-Other		\$ -	
Reconciled Check Book Balance @ month end		\$ 656.90	



## Recommended Procedures

- Financial information should be up to date and organized
  - The information should include receipts, source of receipts, expenditures including the payee's information and a description of the purchase or service, along with beginning and ending balances
- Checks should be signed by two officers
- Checkbooks and funds should not be kept on district property. Parent groups and booster clubs may have a safe on campus but school district personnel should not have access
- Officers should check the addition and subtraction on financial reports
- Officers should also compare the beginning balance to the previous period ending balance





## Money-Handling Procedures

- The Treasurer should count the money while in the presence of the person turning in the money
- The Treasurer should issue a receipt for all monies received
- Deposit all money turned in *daily*
- Money received should only be deposited in the Booster Club's account
- Do not keep money in an unlocked drawer, cabinet, vehicle or other unsecure place
- Money received and not yet deposited should not be used for purchases, loans, advances, reimbursements, or for any other purpose



## Final Tips

- Make sure the incoming Treasurer is a signer on the account.
- Get user i.d's, passwords, checkbooks and bank cards before the end of the year.
- Order reasonable number of items



## Athletic Booster Clubs Gil Cloud - Mick Wilson





## Booster Clubs - ROLE OF BOOSTER CLUBS

- Booster clubs can provide much-needed supplementary financial support. However, booster clubs can provide more than dollars and cents. Their specific purpose and mission should be to support and enhance the school's athletics program and its teams through public relations, fundraising and special events.
- Booster Clubs should also assist in building school spirit, pride and promoting good sportsmanship while complying to TPS and OSSAA rules, regulations and policies.



## Booster Clubs - COMMUNICATION

- The first level of communication is always with the head coach of the given sport. The booster club should always support the head coach and his or her vision for the program.
- The site athletics director is the next level of communication. If there are questions that cannot be answered by the head coach always contact the site athletics director.
- If issues arise that cannot be worked out between the booster club and the athletics director the next level of communication should be with the Principal or the district Director of Secondary Schools Student Athletics and Activities.
- Please feel free contact the District Athletics Office if you have questions at any time. 918-746-6454





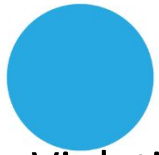
## Booster Clubs - USE OF BOOSTER CLUB FUNDS

- Booster clubs must be sanctioned by the Board of Education each year. Appropriate documents must be presented and a current EIN number must be on file in the Finance office.
- ALL FUNDRAISERS MUST BE APPROVED BY THE Principal, Site AD and the District Director of Athletics.
- Tax Exempt Organization 501(C3)
- Spending priorities for athletics programs will be determined by the site athletics director and the Head Coach with the approval of the building administration. The head coach should discuss program needs with the AD during their annual program evaluation.
- Transition in leadership we encourage each club to have underclass parents serving in leadership roles.



## Booster Clubs - RULE 9

- **No member school or any person with athletics related interest for that school is permitted to recruit a student to select or transfer to that school, or to encourage or allow others to do so on its behalf, based on that student's skill, reputation, or experience in athletics.**
- It's a violation of this rule to offer economic incentives or rewards of any type to a student-athlete, which are not available to all prospective students on an equal basis, regardless of participation in athletics, or offering such economic incentives or rewards to the student-athlete's family members, friends, or associates, for the purpose of encouraging that student-athlete to select, transfer to, or remain at a member school.



## Booster Clubs - RULE 9 *(continue)*

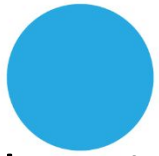
- Violation of this recruiting rule includes initiating or maintaining contact with a student-athlete, or the student-athlete's family members, friends, or associates, in circumstances that could influence that student-athlete to select or transfer to a member school for the purpose of representing that member school in athletic competition.
  - A recruiting violation may also include offering or providing special or additional coaching or instruction that is not offered or made available to other student-athletes at the school on an equal basis, or providing special attention or consideration to a student-athlete who is considering transferring, for the purpose of influencing that student-athlete to remain at the school.
- All officers, administrators, supervisors, and sponsors of any club or organization supporting any athletic activity at a member school must sign a written certification that they are familiar with this Rule, and that the members of the club or organization have been informed about this Rule.



# TITLE IX

## Gil Cloud - Mick Wilson





## WHAT IS TITLE IX

Title IX is a 37 word document that changed education institutions for the better!

- The Title IX Education Amendments Act was passed in 1972.

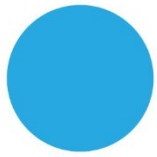
**The law states:**

**“No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to the discrimination under the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance.**



Who does Title IX apply to?

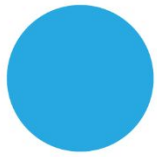
- Title IX applies to all educational institutions, both public and private, that receive federal funds.
- Almost all private colleges and universities must abide by Title IX regulations because they receive federal funding through financial aid programs for their students.



# How is Title IX applied to athletics?

## Athletics programs are considered to be educational programs and activities

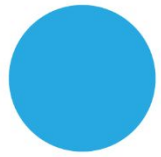
- There are three basic parts of Title IX as it applies to athletics:
  - **Scholarships:** Title IX requires that female and male student-athletes receive athletics scholarship dollars proportional to their participation;
  - **Participation:** Title IX requires that women and men be provided equitable opportunities to participate in sports. Title IX does not require institutions to offer identical sports but an equal opportunity to play;
  - **Other benefits:** Title IX requires the equal treatment of female and male student-athletes in the provisions of: (a) equipment and supplies; (b) scheduling of games and practice times; (c) travel and daily allowance/per diem; (d) access to tutoring; (e) coaching, (f) locker rooms, practice and competitive facilities; (g) medical and training facilities and services; (h) housing and dining facilities and services; (i) publicity and promotions; (j) support services and (k) recruitment of student-athletes.



## KNOW TITLE IX... 8 things to know about Title IX

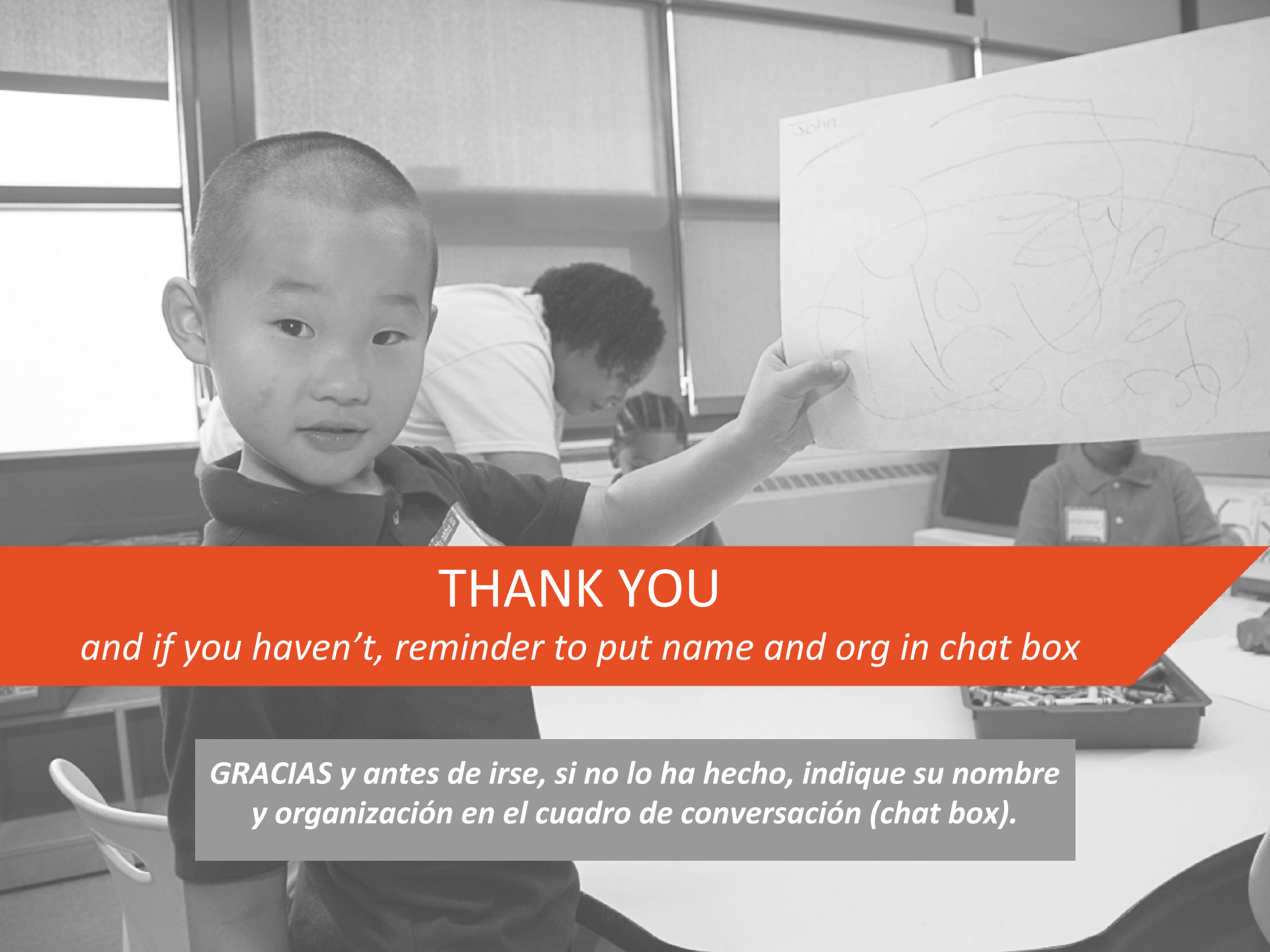
- 1) Title IX is a landmark federal civil right that prohibits sex discrimination in education.
- 2) Title IX applies to both female and male students
- 3) Schools must have an established procedure for handling complaints of sexual discrimination, harassment, or violence.
- 4) Schools should ensure that a victim doesn't have to share spaces such as dorms, classes and campus jobs, with his or her assailant.
- 5) Schools may not retaliate against someone filing a complaint and must keep a complainant-victim safe from other retaliatory harassment or behavior.
- 6) Schools can issue a no-contact directive under Title IX to prevent the accused student from approaching or interacting with you.
- 7) In cases of sexual violence, schools are prohibited from encouraging or allowing mediation (rather than a formal hearing) of the complaint.
- 8) Schools cannot discourage you from continuing your education.





## KNOW TITLE IX... Gender-Based Violence & Harassment

- Under Title IX, discrimination on the basis of sex can include sexual harassment or sexual violence such as rape, sexual assault, sexual battery, sexual coercion, or dating violence
- If you do not know how to report sexual harassment or bullying, ask your coach, Athletic Director or any administrator, school counselor, social worker or ISS Coordinator



THANK YOU

*and if you haven't, reminder to put name and org in chat box*

***GRACIAS y antes de irse, si no lo ha hecho, indique su nombre y organización en el cuadro de conversación (chat box).***



What if I have questions?

*When in Doubt, ask your Principal  
Or*

*Contact the TPS Finance Office as 918.746.6247*

Dawn Hamilton, Exec Admin Assistant [hamilbe@tulsaschools.org](mailto:hamilbe@tulsaschools.org)

Joe Stoeppelwerth, Treasurer [stoepjo@tulsaschools.org](mailto:stoepjo@tulsaschools.org)

Gil Cloud, Athletic Director, [cloudgi@tulsaschools.org](mailto:cloudgi@tulsaschools.org)

Mick Wilson, Deputy Director of Athletics, [wilsomi2@tulsaschools.org](mailto:wilsomi2@tulsaschools.org)

**TO VIEW A RECORDING OF THIS PRESENTATION (from Sept-22-2020), copy and paste the link below to your browser - do not click on the link but copy & paste the entire link to your browser**

**[https://tulsaschools-org.zoom.us/rec/share/Zlbej6BwonKoWCs7C2W7D3XVYbHdQAkhMaEQMO\\_UA-oHHt6CeQJLsfNKFfgPONqz.AsJtxbsHKK9w4ySh?startTime=1600817669000](https://tulsaschools-org.zoom.us/rec/share/Zlbej6BwonKoWCs7C2W7D3XVYbHdQAkhMaEQMO_UA-oHHt6CeQJLsfNKFfgPONqz.AsJtxbsHKK9w4ySh?startTime=1600817669000)**

**Enter passcode: FY20-21 Sanctioning**