

Buckeye Union High School District #201



Booster Club Guidelines 2023-2024

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Partnership with Schools

The strength of booster clubs comes from the participation of the booster clubs with the school site. A partnership should be formed that allows the school to communicate their program's particular needs with the booster clubs. Likewise, booster clubs need to communicate their plans and activities with the school so that administration can ensure the goals of BUHSD are being met and that the full assistance of the school is available as appropriate.

Also of great importance is the partnership between booster clubs and the school administration. The administration must understand the rules and procedures of the booster clubs, just as the booster clubs need to adhere to any administrative, BUHSD, local, and state policies.

Groups establishing or renewing a booster club, are required to complete the Booster Club Application For Approval form and submit to the Athletic Director on an annual basis. This form can be found on page 22-23 of the guidelines.

While it is critical that schools be informed of booster club activities, it is imperative to know that BUHSD employees cannot organize booster clubs used for fundraising purposes. Although employees may participate in booster club activities, they cannot serve as organizers or officers of a booster club whose purpose is to support BUHSD schools.

BUHSD will require verification of certain types of records kept by booster clubs. Therefore, the following is a list of recommended practices to abide by:

- The checking account should require two signatures on each check.
- School officials (any employee) should be in an advisory role only and should not be one of the signatures or officers.
- Maintain a file of all meeting minutes, even if there are no agenda items regarding the purchase of items or services.
- Firm cash controls with procedures and consequences must be in place.
Creating an efficient paper trail of all transactions will deter any misrepresentations.
- Yearly submittal of financial records to the school site's Athletic Director.

Contact Information

Site	Athletic Director	Phone	E-mail
BUHS	Luie Contreras	623-269-1112	luie.contreras@buhds.org
EFHS	William Wright	623-269-1212	william.wright@buhds.org
YHS	Tonya Lee	623-269-1312	tonya.lee@buhds.org

Formal Non-Profit Organization vs. Informal Non-Profit Organization?

Formal Non-Profit Organizations:

Advantages:

Federal & State income tax exempt

Donations are tax deductible

No personal liability for the Board & Officers as long as acting reasonable and prudent

More fundraising opportunities available

Disadvantages:

Annual AZ Corporation Commission reporting

Annual IRS Reporting

Informal Non-Profit Organizations:

Advantages:

Inexpensive, and simple to setup

Disadvantages:

Donations are not tax deductible

May be personal liability

Officers and Board Members may have personal liability for contractual obligations

IRS could determine income subject to federal income tax

Officers and Board could be financially liable for taxes owed

For information on conduct and compliance for non-profit organizations, visit the Arizona Corporation Commission:

www.azcc.gov

Incorporation and Non-Profit Status

Another resource for helpful hints for establishing a parent group is the Internal Revenue Service (IRS).

Most booster clubs are publicly supported 501(c)3 organizations. It is highly recommended that you consider applying and maintaining this non-exempt status through the IRS.

Exempt organizations are not required to incorporate. As stated previously and further emphasized by the IRS, the following are compelling reasons to do so.

- Officers of non-incorporated organizations can be sued.
- Members of “informal” organizations can be held financially liable for income tax all the way up to the first member(s) of the organization.
- Organizations not recognized by the IRS as exempt cannot accept tax deductible donations and donors cannot deduct contributions on their personal income tax returns.

Booster clubs should have a “unique” name that does not include the name of the school or District. Use of the mascot and club/sport title is acceptable upon approval of BUHSD administration. The address should be a post office box or other address and not the school’s address.

Booster clubs may not use BUHSD’s employee identification number (EIN), but establish their own through the IRS.

Communication Tips

BUHSD recommends that groups consider these forms of communication to distribute information quickly and efficiently.

Website

A great way to keep people updated and to promote your activities is through a website. Keep in mind, if the group’s website contains information about students (e.g., name, position, picture), permission must be obtained from the student’s parent/guardian to publish the information.

It is a good idea to have the website reviewed by an attorney who specializes in website content.

Group e-mail

As an efficient and effective way to communicate, ask members for e-mail addresses as they join.

Flyers

Flyers can also be a resource to your followers. All flyers distributed by any group should be reviewed and have the approval from the administration of the school it represents. School resources and equipment should not be utilized.

Fundraising

Funds collected by booster clubs must be kept by the organization and off campus. Funds collected on behalf of the parent group will not be maintained by BUHSD. Any fundraising is presumed to have the intent that the funds will be raised for **students** within BUHSD. Therefore, any fundraising events must be appropriate to the age group of the students and not violate any BUHSD guidelines.

Fundraising on or off school campuses by booster clubs must follow the Student Activities Fundraising approval process and be approved by Student Government and site administration **prior** to the event occurring.

If the fundraising event is located on a school campus or as part of a school program, a BUHSD Head Coach/Club Sponsor and/or site administrator must be present to supervise and control the event. Any food related fundraisers can't be done during the school day in order to maintain compliance with the National School Breakfast and Lunch Programs.

Raffles are not allowed when students are involved. Students cannot participate, handle, solicit or otherwise be involved in any form of games of chance or gambling. With permission from the site administration, raffles can be held by the Booster Club if the boosters or parent volunteers sell the tickets and no students can sell or buy tickets for the raffle.

Items purchased by the booster club for the school/club/team must be donated to BUHSD following the gift and donations procedure. The Request for Approval of Gift/Donation form is in the forms section of this guidebook.

If the fundraiser is a joint event with a student club or group (such as an athletic sport), the Request for Fundraiser or Food Event form must include the following:

- What is the fundraiser (what is being sold or solicited; who is purchasing the fundraising items, etc.)?
- What are the dates of fundraiser including times and schedules?
- Where will the fundraiser take place (locations)?
- Which club or group of students is participating in the event?
- How will the group or students participate?
- What percentage of the profits is being given to the booster club and the student group? The percentage must be in proportion to the participation of each group.

The completed Request for Activity/Fundraiser form must be on file with the school.

Financial Reports

A mandatory annual report is due to the Athletic Director no later than August 31st of each year. See page 24 of the guidelines for the Annual Report form. Once reviewed, the Athletic Director will forward the annual report to the Business Office. This report should list each fundraiser during the fiscal year (July 1 through June 30) and include the following:

- Beginning balances
- Total revenue
- Total expenditures
- Ending balances
- Annual Report prepared by and date
- Booster Treasurer Name and signature

Bank statement copies must be submitted with the Annual Report form template provided in the forms section of this guidebook. The Annual Report will be presented to the Governing Board (Policy KJA).

All forms requiring signatures, the originals must be provided. Bank statements and any other supporting documentation can be submitted electronically.

The following checklist is offered as a resource:

√	Required Check List for Parent Support Organizations
	Contact School Administrator prior to formally organizing.
	Develop and adopt organization By-Laws (governing document), and establish officers of the organization.
	Develop an annual budget and goals.
	File IRS Form SS4 to obtain a taxpayer ID number.
	Establish a bank account.
	Submit an application to the school administration for approval of the booster club
	Meet with school administrator for approval of fundraising activities or events.
	Contact the Arizona Corporation Commission for application of non-profit corporation.
	File application and Articles of Incorporation from the Arizona Corporation Commission.
	Publish Articles in local paper for three (3) consecutive days.
	File annual report to the Arizona Corporation Commission
	<i>No later than August 31 of each year</i> , submit an annual report (July 1 through June 30) to the Athletic Director, listing revenue collected, expenses, and year end balances for each activity.
√	Depending on Parent Support Organization Status- Additional Check List that may be required
	File IRS Form 990 to the Internal Revenue Service
	File IRS Form 1023 “Application for Recognition of Exemption”. Tax status must follow the rules as set forth in the IRS guidelines. (Acquiring an Employer Identification Number-EIN). Groups must have an EIN prior to completing Form 1023. (Reference IRS Publication 557 for complete information).

Booster Club Do's and Don'ts

Do's	Don'ts
Have Constitution, bylaws, and budget approved by the Athletic Director and Superintendent.	Don't allow the Booster Club to represent only a select/exclusive group of parents/students – it should be all inclusive
Have all activities/fundraisers approved following the district policy	Don't function without a constitution, bylaws, or approval budget
Encourage a healthy relationship with the sponsor/coach and site administration – work as a team	Don't hold fundraisers without required approval and having the Request for Fundraiser or Food Event form completed and on file with the site
Have regularly scheduled meetings open to stakeholders	Don't operate without elected officers – following the election process outlined in the Booster Club constitution
Ensure the budget is designed to support the needs of the program	Don't operate at the “last minute”. Meetings, elections, fundraisers, and other activities should be well organization and advertised to all stakeholders
Have adequate accounting procedures in place to assure that the booster club members, sponsor/coach, site administration, district administration can review records of the organization when needed	Don't let Booster Club activities interfere with academic instruction time
File taxes and obtain a federal tax ID number	Don't advertise as a nonprofit unless you have filed the appropriate paperwork and been granted that status
Keep Booster Club funds separate from school/ club funds	Don't use the school name, BUHSD name, team name, or students for any activities that are not approved by the school (e.g., flyers, press releases, websites, etc.).
Understand that gifts from the booster club become property of BUHSD (and may require approval).	Don't allow school/BUHSD employees to organize or serve in leadership roles on a booster club representing BUHSD.
Understand that any financial obligation incurred by Booster Clubs shall be solely that of the Booster Club	Don't use a student's name, position, or picture without written permission from the student's parent/guardian to publish the information.
Remember that donors are more likely to make donations to a 501(c)(3) – but you will need to apply for that status	Don't have students assist, in any capacity, with a fundraiser unless a Request for Fundraiser or Food Event form is in place clearly outlining the percent/amount of funds raised that will be deposited into the student activities account.
Seek legal/accounting services to ensure compliance with all state/federal laws and requirements	

Basic Financial Info - Extra-Curricular Activities

	Student Activities Account	Group/ Booster Clubs	Tax Credit	Gifts and Donations
Where does the money come from?	Student led/ involved fundraising	Booster club member led/involved fundraising (if students are involved in the fundraising, a portion of the money must be deposited in the student activities account)	Public/parental donations (\$200 per single and head of household; \$400 for married taxpayers)	Public/parental donations (may require Governing Board approval based on policy)
Where is the money held?	Bookstore	Booster Club account	Bookstore	BUHSD Financial Services Office
How is the money accessed?	Requisitioned through the purchase order process	Booster club writes a check	Requisitioned through the purchase order process	Requisitioned through the purchase order process

Notes:

The information in the above table is intended to be used as a basic resource regarding fundraising and spending money for extracurricular activities. In some cases, there are restrictions on the types of things that can be purchased from these various accounts. All purchases should be pre-approved. Please refer to your Athletic Director and/or Bookstore Manager with specific questions regarding these issues.

Important clarification: Businesses are not eligible for the Arizona Public Schools Tax Credit Program. They can make a tax-deductible donation to a 501(c)3, but it is not eligible for the Arizona Public Schools Tax Credit Program.

The Buckeye Union High School District and Schools reserve the right to refuse access to district property or to cease partnership with a Booster Club that is non-compliant with financial regulations or violate District policy and procedures.

Sample Organization Structure and Fiscal Operations Guidelines

Strategic Framework

BUHSD finds most organizations and companies clearly define their strategic framework. Again, this is a best practice and each group should consider establishing and defining a strategic framework for success. This framework would consist of things such as:

- A mission statement that defines what they are doing.
- A vision statement for their future.
- Goals and action plans to guide their daily, weekly, monthly, and yearly actions and activities.
- Values that shape their actions.
- Strategies that zero in on their key success approaches.
- A Statement of Philosophy.

Mission Statement

A mission statement is a precise description of what the group does. It describes the business the group is in. It is a definition of “why” the group exists.

Vision Statement

A vision statement is about what the group wants to become. It resonates with all the members of the group and helps them feel proud, excited, and part of something much bigger than themselves. It gives shape and direction to the group’s future.

Goals

Goals should be set on a yearly basis by the group or individuals that represent the group as a whole (e.g., an executive level or parent advisory council). The goals should be communicated to the larger group.

Values

Values are traits or qualities that are considered to be worthwhile. They represent how the volunteers behave with each other and with others in the school and community

Group Formation

Groups will probably be made up mostly of volunteers and should consider the following points.

Structure

For large groups, BUHSD recognizes that an “umbrella” type structure would provide the most benefits. This type of structure can provide a reduction of expenses and efforts. The “umbrella” type group could consist of an executive level or advisory committee and representatives from all member groups. The “umbrella” group could meet on a regular basis to discuss upcoming events, distribution of communication, fundraising ideas, and handling situations.

Recommended guidelines to follow when initially forming a group include:

1. Interested parents should meet with the school’s Athletic Director. At a minimum, a written statement of intent to form must be given to the Athletic Director.
2. Group should meet with “umbrella” group (if there is one) to express interest in developing the particular group.
3. Liability insurance must be obtained and on file with BUHSD.
4. A board should be chosen for the group consisting of a:
 - President/Co-President
 - Secretary
 - Treasurer
 - Committee members
5. Group should establish bylaws or a charter.
6. A report of the meeting should be given to the school administration and group members.

Should an “umbrella” type group consist of member groups, then the “umbrella” group should consider clearly defining:

- How can member groups join or leave the group?
- What is expected of each member in the group?
- What happens if a member group dissolves?
- What is the expected behavior of volunteers?

Sample – Fiscal Operations Guideline Statement

This section will provide an overview of financial operations. These guidelines were developed to offer general direction about financial controls and procedures for groups.

- The funds for the group will be kept at a financial institution that is secured by the Federal Deposit Insurance Corporation (FDIC).
- As a safety protocol, no member will be allowed to withdraw funds directly from the account. All funds expensed must be issued via checks.
- The volunteers responsible for the financial account(s) and reporting will never allow the checking account balance to drop below \$200.
- The group Treasurer and at least two other Executive Board members will have signature authority of the account. It is recommended that these two be one of the Co-Presidents and the Treasurer.
- Checks for more than \$1,000 should require two signatures.
- All processed payments, bills, invoices, and cash receipts will be properly recorded and appropriate backup paperwork will be maintained.
- The electronic account (e.g., using software such as Excel, Quicken, QuickBooks,) will be balanced each month to the statement from the bank.
- There will be no petty cash maintained by the organization.
- All income received by the group must be deposited into the account within two days.
- The group Treasurer will maintain copies of deposit receipts.
- The group Treasurer will make copies of all checks issued and received.
- There will be no credit cards or debit cards issued for any of the group account(s).
- The group Treasurer will review all invoices received prior to payment.
- The records of the group will be open to inspection by members of the group.
- Any copies of financial information requested will be produced at requestor's expense.
- All expense/reimbursement vouchers should be signed by at least two group officers.

**Additional Resources
State of Arizona and BUHSD Policies**

State of Arizona A.R.S. §13-3302. Exclusions

D. A nonprofit organization that is a booster club, a civic club or a political club or political organization that is formally affiliated with and recognized by a political party in this state may conduct a raffle that is subject to the following restrictions:

1. A member, director, officer, employee or agent of the club or organization may not receive any direct or indirect pecuniary benefit other than being able to participate in the raffle on a basis equal to all other participants.
2. A person, except for a bona fide local member of the sponsoring club or organization, may not participate directly or indirectly in the management, sales or operation of the raffle.
3. The maximum annual benefit that the club or organization receives for all raffles is ten thousand dollars.
4. The club or organization is organized and operated exclusively for pleasure, recreation or other nonprofit purposes and no part of the club's or organizations net earnings inures to the personal benefit of any member, director, officer, employee or agent of the club or organization.

Arizona Corporation Commission
1200 W. Washington St. Phoenix, AZ 85007-2929
(602) 542-3026
www.azcc.gov

KJA - RELATIONS WITH BOOSTER ORGANIZATIONS

Governing Board Policy KJA - Some of the strongest school support comes from parents or organizations having strong interests in specific students or school activities. Support from booster organizations is encouraged wherever appropriate as a means of involving the public in the activities and goals of the District. School personnel shall seek to strengthen and support booster organizations by cooperating in any way possible to provide assistance, materials, facilities, or other aid to assist them in helping the schools.

Close communication with booster organizations ensures greater harmony with the policies and goals of the District. Each principal shall assume responsibility for the conduct of any organization approved by that principal for interaction with the students, staff, or program of the school.

The Superintendent shall develop procedures as necessary for the guidance of school personnel who are involved with booster organizations.

BUHSD Fundraising Policy

1. Check the official school calendar. Any student club or organization that plans to schedule an activity should check the calendar for available dates. This includes activities outside of the regular school day.
2. Request for Activity/Fundraiser forms will be available all year. Please seek guidance from the site Athletics Director/administration on Request for Activity/Fundraiser form approval dates. Student Government approval meetings will be open meetings and a faculty and student representative from all clubs with actionable items on the agenda should be present in order to offer clarification or mediation when needed.
3. After the request is approved by StuGo, it will be forwarded to site administration for review and placement on the school calendar. These requests may be forwarded to the District Office for review by the Superintendent and the Governing Board.
4. If off campus, ensure that the location of all events is appropriate for a high school event. Establishments that serve alcohol, promote tobacco use, or other activities inappropriate for young adults are not acceptable for high school events.
5. If the Booster is wanting to assist with transportation costs, the Booster should work with the site Athletic Director to make a financial contribution to support allowable transportation costs that meet district policy and procedures.
6. If your approved activity requires the use of any school facilities, you must request approval from the site Athletic Director. This includes any after hour use. Please remember that the condition of the facility after the event is the responsibility of the club/team/group. Pride in their campus and its appearance should be a guiding value for all student leaders.
7. Raffles, drawings, or lotteries are **NOT ALLOWED** when students are involved.
8. Use of the cafeteria kitchen or its equipment or supplies is **NOT ALLOWED**.

FAILURE TO FOLLOW EVENT/FUNDRAISER APPROVAL PROCEDURES WILL RESULT IN THE CANCELATION OF FUTURE EVENTS.

Forms

BUCKEYE UNION HIGH SCHOOL DISTRICT REQUEST TO HOLD FUNDRAISING ACTIVITY

DATE :		SCHOOL :	
		BOOSTER ORGANIZATION :	
TYPE :		ITEMS :	
OF		TO BE	
ACTIVITY		PURCHASED	
			(Include Vendor w/Cost or Attach Requisition)
DATE(s) OF :		TO	
ACTIVITY			
		A: Current Balance of Account	
		B: Cost Of Materials Needed	
		C: Net Balance After Purchase	\$0.00
NEGATIVE CASH BALANCE ON LINE C REQUIRES ATHLETIC DIRECTOR APPROVAL			
Athletic Director Approval To Carry Negative Cash Bal			
BOOSTER'S NAME		DATE:	
STUDENT GOVERNMENT APPROVAL		DATE:	
ADMINISTRATIVE APPROVAL		DATE:	

BUCKEYE UNION HIGH SCHOOL DISTRICT #201

GIFTS AND DONATIONS REQUEST FORM

Donation Type Equipment Services Cash

Submit this form to the Business Office for all gifts or donations from any individual or group (including student groups) for donations that may serve to enhance and extend the work of the schools or that are not likely to be acquired from public fund expenditures. Governing Board Policy KCD relating to donations and gifts is printed on the back of this form for your reference.

Donor _____ Contact Person if Company Donor _____

Mailing Address of Donor _____

Description of Donation (please include model/serial number if applicable) _____

Dollar Value of Donation \$ _____

How is the gift / donation expected to be used by the school / district / department? _____

Any related costs for installation or maintenance _____

Any initial or continuing financial commitments from school funds _____

Any requirements that would alter or change the appearance of school property _____

Signature of School / Department Administrator _____

Official Use Only:

_____ Donated equipment has value and usefulness to BUHSD.

_____ Actual cash value is estimated at \$ _____.

Recommended acceptance by _____ Date _____

Administrator's Signature Date _____

REGULATION**REGULATION****PUBLIC GIFTS/ DONATIONS
TO SCHOOLS**

To be acceptable, a gift must satisfy the following criteria:

- It will have a purpose consistent with those of the school.
- It will be offered by a donor acceptable to the Board.
- It will not begin a program that the Board would be unwilling to takeover when the gift or grant funds are exhausted.
- It will not bring undesirable or hidden costs to the school system.
- It will place no restrictions on the school program.
- It will not imply endorsement of any business or product.
- It will not be in conflict with any provision of the school policy or public law.

All gifts, grants, and bequests shall become District property and subject to policies of the District.

BOOSTER CLUB APPLICATION FOR APPROVAL



As an organization we agree to abide by the By-Laws of our organization, and follow District Guidelines for Operation, while we strive to improve our children’s educational opportunities where support is needed.

Name of Organization: _____ School: _____
 Renewal **OR** New Organization Entity ID#: _____

Required Documents:

- 1) Copy of By-Laws **and** Standard Operating Rules
- 2) Documentation of filing with the Arizona Corporation Commission (**confirmation documentation required**)
- 3) Documentation of filing of Form 990 with IRS (**confirmation documentation from the IRS required if applicable**)
- 4) Most recent Annual Report **and** a bank statement
- 5) Revenue (July 1, 2022 to June 30, 2023) _____ Expenses (July 1, 2022 to June 30, 2023) _____
(Please indicate the amounts for the previous year: (this information is required by GASB No. 39)

OFFICERS:	
Name _____	Name _____
Office Held _____	Office Held _____
Signer on Bank Account <input type="radio"/> YES <input type="radio"/> NO	Signer on Bank Account <input type="radio"/> YES <input type="radio"/> NO
Phone _____	Phone _____
Email _____	Email _____
Name _____	Name _____
Office Held _____	Office Held _____
Signer on Bank Account <input type="radio"/> YES <input type="radio"/> NO	Signer on Bank Account <input type="radio"/> YES <input type="radio"/> NO
Phone _____	Phone _____
Email _____	Email _____
Name _____	Name _____
Office Held _____	Office Held _____
Signer on Bank Account <input type="radio"/> YES <input type="radio"/> NO	Signer on Bank Account <input type="radio"/> YES <input type="radio"/> NO
Phone _____	Phone _____
Email _____	Email _____

Planned Activities/Goals:

As officers, we hereby agree to abide by the By-Laws of our organization, attend annual District-provided Parent Support Group training, and follow the District's Guidelines for Operation and Financial Responsibility while we strive to improve our children's educational opportunities where support is needed.

Officer Signature

Date

Officer Signature

Date

Athletic Director's Approval: _____

Signature

Date

Buckeye Union High School District

Booster Club Financial Report

Financial reports for Booster clubs are due annually to the Buckeye Union High School District Business Office. Reports for July 1 to June 30, are due August 1. Please attach a copy of the June bank statement. Additional statements may need to be provided upon request.

Name of Club:	
Opening Cash Balance	
Income	\$0.00
Expenses	\$0.00
Ending Cash Balance	

All income (Fund raising, donations, contributions, memberships, etc)

Description of Income	Amount of Deposit
Total	\$0.00

Expenses (all disbursements)

Description of Expense	Amount of Expense
Total	\$0.00

Club President (Printed)	Date
Signature	