

Phoenix Union High School District

# Student Activities

## Club Sponsor Handbook

2022-2023



Dear Club Sponsor:

Thank you for taking the time out of your busy schedule to be a Club Sponsor. The purpose of this handbook is to guide you on the district policies and procedures set in place to maintain compliance with the laws established in the Universal Systems of Financial Records. (U.S.F.R.) and Arizona Revised Statutes. This handbook contains guidelines regarding your responsibilities as a Club Sponsor, District fundraisers, collection and depositing of money, and travel guidelines.

As a Club Sponsor you are responsible for the club activities and must provide guidance to the student members as to the policies and procedures regarding student clubs. Violations to policies and procedures regarding clubs are taken seriously.

Each school has an Assistant Student Activities Treasurer (Bookstore) and approved by the Governing Board. They are there to assist you in making your club run smoothly. You may also contact the Student Activities Department at the District Office with any questions you may have.

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All forms and information can be located at: <https://www.pxu.org/Domain/4878>

Path: Phoenix Union Home Page> Departments> Bookstore> Documents, Forms, and Handbooks

## **Student Activities Introduction**

Student activities are defined in Arizona Revised Statutes (A.R.S.) §15-1121 as student clubs, organizations, school plays, or other student entertainment. Student activities monies are raised by the efforts of students with the approval of the Governing Board. These monies must be accounted for in an agency fund titled Student Activities Fund 850, which is separate and distinct from district operating funds.

The Governing Board has established the Student Activities Fund. The Governing Board has established district policies that govern all school clubs and has appointed the Bookstore Operations Manager as the Student Activities Treasurer to be responsible for the fund. The Governing Board has also approved Assistant Student Activities Treasurer for each school (Bookstores).

District Administration is charged with developing procedures for the schools which maintain compliance with the Governing Board policies, the Universal Systems of Financial Records (U.S.F.R), and the Arizona Revised Statutes.

The Student Activities Treasurer and Assistant Treasurers support the schools in processing of all receipts, disbursements, communication, training and monitoring district compliance with procedures, and documentation.

At the school level the Principal/Assistant Principal acts to protect the student's assets by making sure that club activity is in alignment with statutes, Governing Board Policies, and District procedures. The Principal/Assistant Principal reviews and approves club constitutions, minutes, activities, and financial information.

The Club Sponsor is responsible for assisting the club with day-to-day operations and providing a framework for decision making. Club Sponsor's help the club with fundraising and planning activities. The Club Sponsor's role is not to make decisions for the club, but to provide information, counsel on outcomes, implement decisions, and ensure compliance with District procedures.

This handbook has been developed as a guideline for the Club Sponsor. The following sections will walk you, the club sponsor, through setting up a new club, fundraising, making purchases, and paying invoices.

## Sponsor Responsibilities

Include, but are not limited to:

- ✓ Attend annual Club Sponsor meeting and complete and submit the Student Activities Club Sponsor Handbook Agreement. If joining as a new sponsor after the start of the year, meet with the APO to review the handbook and complete the assessment.
  
- ✓ Submit the Club Sponsor Form at the beginning of each school year to the APO Office, Bookstore, and Student Activities department to activate codes in Visions.
  - ✓ Form must be submitted prior to club activities (including fundraisers) and before purchases can occur
  
- ✓ Attend and facilitate all club meetings
  - ✓ The number of meetings should be limited to not more than once per week
  - ✓ As a rule, meetings should not be held at night. Parents and Administration are to be notified when a night meeting is required.
  
- ✓ Ensure written minutes are kept for all meetings as well as any necessary documents
  
- ✓ Assisting the club with day-to-day operations and providing a framework for decision making. Club Sponsor's help the club with fundraising and planning activities. The Club Sponsor's role is not to make decisions for the club, but to provide information, counsel on outcomes, implement decisions, and ensure compliance with District procedures.
  
- ✓ Please remember that you are a PXU representative at all times, but you are not authorized to sign contracts or obligate the District in any way. Operating outside procedure may result in personal liability for any related expenses.

## Club Organization

### Forming a New Club - (If Club is already established at site, go to Step 4)

\*\*It is recommended that prior to starting a new club, verify with your Bookstore that a similar existing club is not already established.

- 1) The Club must have a sponsor who is a **certificated employee** of the District and approved by the school Principal/APO and Student Government.
- 2) Submit a Club Constitution form that identifies the purpose of the club to Associated Students (STUGO), the APO for signature, and then to the Bookstore for final content review.
- 3) Once the campus has approved the Club Constitution, it will be sent to the Student Activities Department at CEE for review and final approval through the Legal Department. When approved at CEE level, an account will be established.
- 4) Club must elect officers and notate officer names and member names on the Club Sponsor Form and submit to APO Admin Assistant and the Bookstore. Club Sponsor form must be submitted each school year.
  - i) Bookstore will email completed Club Sponsor form to Student Activities Department for code activation.

*\*Please allow 24 hours for Club account codes to be activated. Please contact Bookstore for confirmation of activation.*

The following items **must** be received at the District's Student Activities Department prior to any financial activity:

- ii) Completed Student Activities Club Sponsor Handbook Agreement
- iii) Completed Club Sponsor Form

Club Constitution and Sponsor Form can be found at: <https://www.pxu.org/Page/20247>

*Path:* Phoenix Union Home Page> Departments> Bookstore> Documents, Forms, and Handbooks

### Club Meetings

The following are the procedures for holding club meetings.

- 1) Club Officers and Sponsor should schedule meetings. Notice of meetings should be given/posted for all members at least 24 hours in advance of scheduled meeting.
- 2) The club secretary, or other designee must take minutes (Meeting Minutes Form).
- 3) Club President calls the Meeting to order.
- 4) Prior Meeting Minutes are reviewed, and approved as is, or with changes.
- 5) The Treasurer should present Financial Statement/Account Balance. Account balances may be obtained at the Bookstore.

- 6) Any committee reports, Old Business, and New Business are discussed.
  - a) Any discussion that results in a decision to be made by the club requires a motion.
  - b) Club Officer/member can make a motion.
  - c) Another Club Officer/member must second the motion.
  - d) The motion can then be discussed.
  - e) After the discussion is complete the President makes a call for vote.
  - f) The motion passes or fails by a simple majority in attendance.
  - g) Motions must specifically address any purchases or payments that the club would like to make. The amount to be spent, items/services to be purchased, the date(s) of the event, and the vendor must be identified.
  - h) Sponsors cannot make the motion or second it, and have no vote.**
- 7) A motion to adjourn is made by an Officer/member.
- 8) The Minutes are reviewed and must have signatures from all Club Officers in attendance and Sponsor.
- 9) Minutes are maintained by the Club Sponsor and must be retained for three years for audit purposes.

\*All athletic teams using student's funds are considered clubs. Therefore, any fundraising entity **MUST ADHERE** to **PXU** club policies and procedures.

## Club Revenues

Student Activities monies can be from a variety of sources including: Dues, Concessions, Interest, Ticket Sales, Penny/Coin Drives, Gifts, and Fundraising Events.

\*Interest earned on Club accounts will be allocated to the appropriate club (STUGO) at least once a year.

### Fundraising Events

- 1) All fundraisers must have approval from the Student Government and the APO prior to the start of the fundraising activity. (Student Activity Fundraiser Approval Form)
- 2) Clubs may **NOT** hold a raffle or games of chance as a form of fundraising.
- 3) Food concession sales must adhere to guidelines of Facilities Permit and may not be in competition with Food Service meals.
- 4) Clubs may participate in joint ventures with Parent Organizations.
  - a) The proceeds must be allocated proportionately between the two groups.
  - b) The Principal or APO, prior to the event, determines the percentage divided among the groups.
  - c) A Joint Venture form is completed and signed prior to the fundraiser (See sample Joint Venture form).
  - d) Proper documentation to support cash received to items sold is maintained by the Parent Organization.
  - e) Student group deposits their portion to the club account
    - i) **NOTE: The District cannot issue a check to a Parent Organization or Booster group. DO NOT deposit the Parent Organization/Booster group portion into a student club account.**
- 5) Types of Fundraisers
  - a) **Pre-Order Fundraiser:** Fundraisers in which you take orders from a catalog and then order the product from the company.
    - i) Club meets and approves fundraiser.
    - ii) Club submits Student Activity Fundraiser Approval Form to Student Government and Principal/APO for approval.
    - iii) Club sponsor completes a Requisition Request for the fundraiser to the Bookstore. Also include the dates for the sale.
    - iv) Bookstore will enter in an electronic requisition. Electronic requisition is approved by APO, Student Activities will review the Requisition Request, Club Minutes, and other necessary documents, and send to Purchasing for issuance of a Purchase Order.
    - v) The Vendor Copy of the purchase order will be sent to the Sponsor and the Vendor.
    - vi) Once the Purchase Order has been obtained, fundraising may begin. The District cannot authorize payment of any invoice for purchases made prior to the issue date on the purchase order.
    - vii) Keep a copy of all order forms for audit purposes.



- b) **Stock-on-Hand Fundraiser:** Fundraisers in which you provide the item/service at the time of the sale (such as candy sales or car washes)
- i) Club meets and approves fundraiser.
  - ii) Club submits Student Activity Fundraiser Approval Form to Student Government and Principal/APO for approval.
  - iii) Club sponsor completes a Requisition Request for all items you may need for the sale. Also include the dates of the fundraiser and a not to exceed (NTE) amount.
  - iv) Club sponsor submits the completed Requisition Request and Club Meeting Minutes authorizing the Purchase Order.
  - v) Bookstore will enter in an electronic requisition. Electronic requisition is approved by APO, Student Activities will review the Requisition Request, Club Minutes, and other necessary documents, and send to Purchasing for issuance of a Purchase Order.
  - vi) The Vendor Copy of the purchase order will be sent to the Sponsor and the Vendor.
  - vii) Once the Purchase Order has been received, the club sponsor may purchase the supplies needed that are included on the Purchase Order.
    - (1) You may not purchase items that are **NOT** included in the Purchase Order or exceed the amount approved in the Purchase Order.
  - viii) Prior to the sale you will need to take an inventory of what you have to sell.
    - (1) Track the inventory using the Sales Reconciliation
      - (a) Track each individual item (Water bottles, Candy Bars, Chips, etc.)
      - (b) Count the beginning number (start-up quantity) for each item. (100 bottles of water, 50 candy bars, 50 bags of chips)
      - (c) Enter in the price for each item (water \$1.00, candy bars \$.50, chips \$.75)
  - ix) At the end of the sale, count the remaining items and enter into the Sales Reconciliation.
    - (1) This should be done after each event. If you have an event lasting more than one day, you must complete the inventory tracking each day.
  - x) After the fundraiser is complete submit the Cash Collection or Ticket Sellers Worksheet to the Bookstore along with the money collected.
    - (1) Sales Reconciliation is used when items are sold such as candy.
    - (2) Ticket Sellers Worksheet is used when tickets are sold.
  - xi) Any unsold inventory should be accounted for and properly safeguarded.
- c) **Crowdfunding Fundraiser (GoFundMe, DonorsChoose, etc.)**
- i) The Principal or designated site Administrator should pre-approve all crowdfunding projects and requests prior to being posted. Without prior approval, the school or district name may not be used on any crowdfunding site to solicit donations.
  - ii) Be mindful as to what is being requested and consider public perception, especially requests PXU is legally required to meet.
  - iii) All donations must be used for the purpose for which they are donated.
  - iv) Any funds raised by a school are subject to all District procurement rules and expenditure guidelines.
  - v) When posting pictures/videos/images of any students or staff, all PXU policies and procedures must be followed to maintain compliance with FERPA.
  - vi) If crowdfunding campaign involves raising funds for technology or capital improvements, pre-approval must be obtained.

**\*\*Crowdfunding policies and procedures are subject to change and are currently still in the process of being written.**

## **Collecting Money**

- All money collected must be deposited **intact** daily at the Bookstore by Club Member or Sponsor.
- Sponsors may **NOT** keep cash from any activities for petty cash expenditures.
- Private bank accounts are **NOT** authorized for use by any student clubs.
- Two people should count money.
- Money should always be physically safeguarded. Any monies held overnight need to be placed in the school safe.
- It is important for you and your treasurer to keep track of the club balances by keeping a journal of deposits and payments.
- When cash box switches hands, the Chain of Custody form must be signed.

## **Change Fund Request**

- 1) Contact Bookstore to request change box.
- 2) Bookstore will issue change fund box.
- 3) Chain of Custody is completed by Bookstore with the amount of change issued in box.
- 4) Club Sponsor verifies amount given in change box and signs the Chain of Custody and the Sales Reconciliation or Ticket Sellers Worksheet.
- 5) Sponsor locks cash box in secure location until event.
- 6) At the start of the event, person selling tickets/items verifies the amount in the cash box and signs the Chain of Custody.
- 7) At the end of the event, person selling tickets/items verifies the ending amount in cash box and the amount of tickets/items sold and completes the Ticket Sellers Worksheet along with the Sponsor.
- 8) Ticket Sellers Worksheet and cash box are locked in secure place
- 9) Ticket Sellers Worksheet and cash box are given back to Bookstore to verify amount.
- 10) Bookstore and Club Sponsor sign the Chain of Custody when change fund has been returned.
- 11) Bookstore deposits money.

## **Inventory Procedures**

Inventory must be kept on all items sold

- 1) Items are ordered and received.
- 2) Items are counted to get the beginning quantity.
- 3) Number of items sold are tracked on using the Sales Reconciliation form.

- 4) Items are counted again after sell to obtain the number of items sold.
- 5) Number of items sold is reconciled against the price of the item to obtain the amount that should be deposited.
  - a. Difference can occur due to damaged inventory or incorrect change given. **Any amounts that do not balance must be recorded.**
- 6) Inventory is counted and verified at the beginning of the year or sale, mid-year or end of sale, and at the end of the year for year-long sales.

## Purchasing Items/Services

The USFR strongly encourages school districts to follow the procurement rules for Student Activities Fund purchases that meet or exceed the amount requiring sealed bids. **Please refer to the Annual Purchasing Memos for approved vendors located at**

<https://www.pxu.org/Domain/111>

- Monies should be expended in a manner beneficial to students currently enrolled in a PXU high school.
- Students who have graduated can no longer be recipients of funds from a student club.
- Approval to make disbursements must be documented in the club minutes.
- Student Activities Funds cannot be used for non-student groups or organizations unless funds were raised specifically for the purpose of donating for a particular cause. This type of fundraiser must be documented in the minutes of the club prior to the event taking place.
- Student Activities Fund monies should not be used to defray any district operating expense, for example substitute teachers, classroom supplies, security guards or custodians.
- **Expenditures cannot be paid for or reimbursed out of cash receipts; all expenditures require a Purchase Order.**
- Clubs cannot donate to Parent Organizations or be reimbursed by a club.
- Clubs cannot make gifts/donations to individuals.
- Clubs cannot pay club members for time worked at fundraising activities.
- Clubs cannot pay teachers. Student Government can only give gifts during Teacher Appreciation Week and the end of school. Student Government may spend no more than \$25 per teacher.
- If relation between Vendor and Club Sponsor exists, please refer to Conflict of Interest; HB 2663 located at: <https://www.pxu.org/Page/4503>
- Any services that require a contract must be reviewed and signed by the Purchasing Department prior to a Purchase Order being issued.
- All purchases that have an agreement must be attached to the electronic requisition for the Purchasing Department to review and sign. Allow adequate time for possible legal review and adjustments.
- A registration form or flyer is required for registration fees along with the Travel Request form. The registration form or flyer must indicate whom payment is being made to as well as total dollar amount. The Club Sponsor must sign on registration form or flyer for confirmation.

## Obtaining a Purchase Order

- 1) During club meetings, any actions requiring a purchase of goods or services need to be discussed and documented in the minutes. Minutes must contain the motion, a second, the amount approved, the date of the activity, the vendor, and that the motion was voted on and approved.
  - a) Minutes must clearly indicate what it is the club wants to purchase.
  - b) Minutes must have a motion and a second made by a student proposing the purchase of the items/services. **Sponsors cannot make the motion, second it, influence students or vote.**
- 2) Decide on the vendor.
- 3) Once a vendor is selected, complete a Requisition Request form.
  - a) Be sure to give complete information on the vendor information, such as the address.
    - i) If you are using a new vendor that is not in the District system, you will need to obtain a W-9 and Vendor Information Form from the Vendor and submit with Requisition Request form and other necessary documents to be attached with electronic requisition.
  - b) Be sure to give complete information in the description area.
    - i) Open Purchase Orders may be obtained however the District will not pay any amount over the "Not to Exceed" amount. Any expense beyond the "Not to Exceed" is considered After-the-Fact and requires a PO Modification. Excessive After-the-Facts may result in corrective action for the club and club sponsor.
    - ii) Open Purchase Orders must contain the names of authorized users of the Purchase Order. Students are **NOT** authorized purchasers.
    - iii) Line item purchase orders must contain everything you wish to purchase. The District cannot pay for any extra items or fees.
  - c) Do not forget to include taxes, shipping, and/or any design or set up fees.
- 4) Submit the completed Requisition Request, Club Minutes authorizing the purchase, and any other forms to the Bookstore.
  - a) The Bookstore will verify that you have all the information needed.
  - b) Code your Requisition Request to the correct account.
  - c) Bookstore will enter the requisition online, attach minutes and any forms to the electronic requisition.
- 5) Once the Purchase Order is complete, the Buyer in Purchasing will send the vendor copy of the Purchase Order to the Club Sponsor and Vendor.
- 6) When Club Sponsor receives Blanket Purchase Orders, you may contact the vendor and place the order.

**\*\*Sponsors who orders merchandise from a vendor prior to submitting their requisition may be obligated to pay for this expense out of own pocket. Requisitions received after an order is placed will be subject to the District's After-the-fact process. In the event there are not adequate funds in the club account or if the students do not authorize the expenditure, the sponsor may not be reimbursed.**

\*\*Failure to comply with the requisition procedure may result in the sponsor receiving a "violation" letter from the District office. After repeated violations, the sponsor/club may be restricted from the use of club funds for the remainder of the school year.

### **Facility Rental Procedures**

- 1) Club approves rental in club minutes.
- 2) Please refer to the Facilities Rental webpage at: <https://www.pxu.org/Domain/110>

## Payments & Disbursements

Once you have obtained your purchase order you may order the items/services. At the time of purchase, or shortly after, you should receive a receipt or invoice. This receipt or invoice is needed to generate a check to the vendor.

- If you have an invoice or receipt, then the District has not paid for the items/services. You must forward the approved receipt or invoice to the District Student Activities Department for payment.
- We do not know if you have used a purchase order unless you submit the invoice or receipt to us, or the vendor calls us looking for payment.
- Angry vendors have been known to stop taking our purchase orders and placed the District on credit hold. This affects **everyone** in the District, not just your school.

### Sponsor Checks

\*\*up to \$500 per check are permitted for small items purchased from vendors not willing to take PO's and cannot be purchased through a PXU approved vendor.

- 1) After Purchase Order been processed for a Sponsors Check, you will be notified via email from the Student Activities Department
- 2) Sponsor Check will need to be picked up at CEE-Student Activities and signed out.
- 3) **Sponsor Check(s) will no longer be sent through interoffice mail.**
- 4) Only items/vendors authorized on Purchase Order can be utilized
- 5) Receipt(s) must be returned to Bookstore immediately and rectify any unused monies.
  - a) Receipts for purchases must be returned within ONE week of event
  - b) Receipts dated prior to the date the check was written will not be accepted without prior authorization from the Student Activities Department.
- 6) Bookstore staff will submit receipt(s) and envelope to CEE.

*Authorization is limited and will only be given for emergencies beyond the sponsor's control. The sponsor is responsible for all cash and receipts. Monies or documentation not returned or unacceptable will be deducted from the sponsor's next available paycheck.*

### Food/Meal Money Per Diem

\*\*Guidelines provided by the State of Arizona Accounting Manual will be reviewed and followed for Meal Money disbursements via Sponsor Check.

1. Any food or meals needing to be provided by use of sponsor check, Sponsor/Club members must provide breakout of dollar per student.
2. Tax Credit monies cannot be used for food or meals unless field trip has been approved through travel and abides by the travel guidelines.

\*\*Food/Meal Money Per Diem policies and procedures are subject to change and are currently still in the process of being written.

### **Processing Payments to District Employees - EPARS**

- 1) The activity must relate only to the club; it cannot be part of a class.
- 2) The activity must be outside of the normal school day.
- 3) The activity must be approved by the club in minutes showing a motion and second by the student members of the club and the maximum approved amount.
- 4) Provide Bookstore with Requisition Request and approved Meeting Minutes so EPAR can be submitted
  - Provide the name of employee working
  - The date(s) employee is working
  - What the employee will be doing
- 5) Position must be approved before employee can work.

### **Processing Payments to Non-District Employees - Purchase Order**

- 1) The activity must relate only to the club; it cannot be part of a class.
- 2) The activity must be outside of the normal school day.
- 3) The activity must be approved by the club in minutes showing a motion and second by the student members of the club and the maximum approved amount.
- 4) Take Requisition Request, approved Club Meeting Minutes, W-9, copy of Social Security Card, and ID to Bookstore so requisition can be entered.
- 5) Invoice must be provided and signed by Club Sponsor approving services received and given to Bookstore to be received on.



## Gifts and Donations

Any item bought from club money that will be kept at or utilized by the school is considered a gift. If a club would like to purchase items for the school, it must be indicated on the Requisition Request and approved on the Club Meeting Minutes.

- 1) Approve the purchase through club minutes.
  - a) A clearly indicated motion of the purchase and second is needed.
  - b) Sponsors cannot make the motion or second it.
- 2) Contact Vendor to obtain pricing of the items the club wishes to purchase.
  - a) Obtaining at least three quotes is highly recommended.
- 3) Complete a Gifts of Funds, Equipment, Supplies and/or Material form indicating what it is you would like to donate and the dollar amount of the gift.
  - a) This must be specific and accurate for auditing purposes.
- 4) Complete a Requisition Request.
- 5) Submit Requisition Request, Club Minutes authorizing the expenditure, and the Gifts of Funds, Equipment, Supplies and/or Material form to the Bookstore.
  - a) The Bookstore will:
    - Verify that you have all the correct information needed
    - Code the requisition
    - Attach paperwork to electronic requisition
- 6) Once the paperwork is received at the CEE, it will be approved by the appropriate party(ies).
  - a) The appropriate party(ies) will review the gift and determine if the gift meets District and USFR standards.
  - b) Once the appropriate party(ies) approves the gift, the gift is put on the next board agenda for Board approval.
- 7) Once the board approves the gift a purchase order is issued.
- 8) The purchase order will then be sent back to the school office for the club to order the items/service.

## Student Scholarships

Should a Club choose to award scholarships to students, the following procedures must be followed.

- 1) Club Sponsor and Club Officers as a committee must develop the criteria and process to be used to award scholarships from the Club account. This must be motioned in the Club Meeting Minutes and approved.
  - a) Written Statement of Criteria.
  - b) Number and amounts of the Scholarships to be awarded.
  - c) Application Form created and based on statement of criteria.
  - d) Announcement of the Application Process to possible candidates.
- 2) Club Sponsor and Club Officers must review all applications submitted and vote on the awards, as a committee based on the established criteria. Club minutes documenting the awards must be taken.
- 3) A Requisition Request detailing the award must be submitted to the Bookstore with other supporting documents. The requisition can be made out in the following way:
  - a) To the student's College of choice.
- 4) Requisition must include:
  - a) Approved Club Minutes authorizing awards
  - b) Copy of written criteria
  - c) Copy of Application
  - d) Student's College ID number
- 5) A purchase order and check will be issued based on the Requisition Request and Club Meeting Minutes.
- 6) All supporting documents must be maintained within the club records.

## Booster Clubs

Parents or a community support organization may form a booster club to complement a student activity or student organization (e.g., athletic team, band, cheer, fine arts, and performing arts) or to promote a school program.

The purpose of a booster club is to assist and support, but not to supplant an existing school program, student activity, or student organization. Therefore, it is essential that all such activities, organizations, and programs remain housed at the school level and under the control, direction, and supervision of the Board through its Administrative team and its duly-appointed professional employees.

PXU shall approve a Booster Club only when it operates in compliance with Board policies and this operating procedure. Only an approved Booster Club may access and utilize PXU facilities. A Booster Club must re-apply for approval each school year. In addition, to remain as an approved Booster Club, the conduct of its activities must remain in a manner consistent with the goals, mission, philosophy, policies, and operating procedures of the PXU.

The process and procedures for establishing a Booster Club can be found on the PXU website. While the sponsor may not run a Booster or PTO, it is recommended that you encourage supportive relations with parents for the support of our students.

Booster Club paperwork, policies, and procedures can be found at:

<https://www.pxu.org/Page/4545>

*Path:* Phoenix Union Home Page> Departments> Finance> Booster Club/Other School Support Organizations

## Advertising

The District currently has policies and procedures for advertising and all established procedures must be followed. The current procedures and forms are on the website under the Bookstore location listed on the bottom of the table of contents.

<https://www.pxu.org/Page/20247>

*Path:* Phoenix Union Home Page> Departments> Bookstore> Documents, Forms, and Handbooks

## Tax Credit Contributions

Qualified activities and qualified programs per Arizona Department of Revenue Publication 707 include:

- Extracurricular activities
- Character education programs
- Standardized testing fees for college credit or readiness offered by a widely recognized and accepted educational testing organization
- Preparation courses and materials for standardized testing
- The career and technical education industry certification assessment
- Cardiopulmonary resuscitation training pursuant to A.R.S. §15-718.01

Unqualified expenses could include, but are not limited to:

- Senior trips or events that are recreational
- Amusement or tourist activities (i.e. Disneyland, Universal Studios)
- Events for a grade
- Program materials required to teach a class
- Any other items prohibited in statute

If planning a trip wishing to use tax credit funds, prior approval of usage of tax credit monies must be granted by the Bookstore Operations Manager.

\*Tax Credit contributions are not refundable or transferable per Publication 707.

## Travel Procedures

Follow the steps to request a field trip or other travel with students to ensure student safety and security. Refer to Travel Handbook for more detailed information at:

<https://www.pxu.org/Page/23390>

*Path:* Phoenix Union Home Page> Departments> Teaching & Learning> Dr. Stacie Hacker's Face

### Requirements - Local Trips

- 1) Field Trip Request must be completed and approved by Principal prior to submission
  - a. Must be in Travel Department (CEE-3<sup>rd</sup> Floor) **minimum of 10 days prior** to proposed event/travel departure date
- 2) Certified employee must complete Travel Request form, supervise, and attend the trip.
- 3) Compliance with District set student to adult ratios per District's Chaperone Procedures for Optional Student Travel (IJOA-OP-2) must be followed.
  - a. Grades 9-12: Local 10:1

### Requirements - Out-of-State & International

- 1) Field Trip Request must be completed and approved by Principal prior to submission
  - a. Must be in Travel Department (CEE-3<sup>rd</sup> Floor) **minimum of 12 days prior to Governing Board meeting.**
- 2) Certified employee must supervise and attend the trip.
- 3) Male and Female chaperones must be included in ALL overnight field trips with mixed gender students. Staff member and student cannot room together.
- 4) Compliance with District set student to adult ratios per District's Chaperone Procedures for Optional Student Travel (IJOA-OP-2) must be followed.
  - a. Grades 9-12: Ratio 10:1
- 5) Student roster must be sent to Travel Department
- 6) Student who have graduated from High School at the time of the trip may not use tax credit money or club monies for their portion of the trip.

- All field trips must be approved by the Principal/Administrator
- Pay close attention to time lines/elements for travel request (refer to Travel Handbook)
- Cost related to student events may be funded using the club/tax student activity account
- Student activity funds cannot be used for travel expenses for teachers, principals, superintendents or other adults unless required for chaperoning purposes.
- A Parent Permission form is required for each student attending the trip and must be submitted to the APO five (5) days prior to the trip
- All school sponsored field trips are covered under a District "Blanket Policy" providing all students travel together. Coverage is only to and from event. If students are traveling via airlines, student name MUST be exactly the same as their ID for travel.
- Students may NOT be transported in personal vehicles.

- Students are NOT allowed to return from the event by non-district personnel or in a non-district vehicle. (Unless prior approval of Administration. The Alternative Transportation for Athletic Events Agreement must be signed and provided to the APO.)
- All chaperones must exhibit behavior consistent with the Professional Agreement when chaperoning a school/district sponsored event.
- All chaperones that are volunteers or parents (non-district employees) must fill out a volunteer packet and be fingerprinted. All cost and funding sources must be listed on the travel request. In addition to the travel request all requisitions for expenses must be completed through the Bookstore.

## Transportation Requirements

See the Purchasing Department's Annual Purchasing Memo for the "Bus Request Memo" at: <https://www.pxu.org/Domain/111>

- 1) District School Bus
    - a. Requested through the Purchasing Department.
    - b. Bus Request Form and Transportation requisition in iVisions used to request and pay for the bus.
    - c. **Must be submitted four (4) working days prior** to date bus is needed
  - 2) Charter Bus
    - a. **Must** use District approved company or Travel Agent to book.
  - 3) Airline
    - a. **Must** use District approved Travel Agent to book airline tickets.
    - b. **No 3<sup>rd</sup> party vendors will be accepted!**
- Appropriate adult supervision is required on the bus/vans at all times
  - The sponsors should have a roster of the students assigned to their bus.
  - In the event that a student does not show up or report back to the bus for the return trip, the following is suggested:
    - Supervisor should page and look for student
    - Wait 30 minutes for the student to appear
    - Leave one sponsor at the site
    - Phone or contact parents
    - Contact the Principal and advise him/her of the situation immediately
  - Sponsors are responsible for the conduct of their students. The bus driver is in charge of all occupants using the vehicle. All decisions regarding safety are the bus driver's responsibility.
  - Buses and school vans are to be returned clean and with a full tank of gas. **A** gas receipt is to be submitted to the Office of the Assistant Principal for Student Opportunities.

- For out of town travel using District transportations vans must have a pre-trip inspection/service by DSF at least one week prior to departure.
- All summer travel for club and athletic events must use club or tax funds to pay for their fuel expenditures. Please plan adequate time for a sponsors check as listed in the disbursements.

## Payment Requirements

- 1) Club votes and approves using club funds for the trip. Be sure to include a not to exceed amount and the dates for the trip.
- 2) Submit Club Minutes and a request for a purchase order to Bookstore manager.
  - a. You will need to break out the amount per person, the date of the trip, where you are going, the number of people going, and breakout by transportation costs, meals and lodging costs, and entrance fee costs.
- 3) A Purchase Order will be issued for the amount requested for the trip.
- 4) All money for the trip must be deposited into your school account through the Bookstore. Payments made directly to the vendor are prohibited.
- 5) After the purchase order is issued we can begin making payments to the vendor
  - a. We must have money available in your account to make a payment to the vendor.
    - i. This means that you need to have student payments due to the school at least two weeks prior to the due date for the vendor.
      1. Payment due to vendor on July 1 = student payment due date is June 17. This allows for any late student payments, gives the Bookstore time to deposit the money and allows processing time for the District to issue the check to the vendor.
- 6) Be sure to let parents know all the payment details.
  - a. When are payments due
  - b. Exactly how much will the trip cost
  - c. Refund deadlines
  - d. What the requirements are for a refund - check with your travel agent or tour group on what their refund policies are.
    - i. Let parents know that tax credits are NOT refundable no matter the circumstances

# Social Events

## Dance Event Rules

- A minimum of one staff member per 25 students must be recruited to supervise a dance.
- Request to host a dance must be submitted to the APO
- Students that have a debt to the school will not be allowed to participate in school dances.
- Student ID's will be required to purchase a ticket.
- Student will be required to show ID at entrance to the dance along with their ticket to enter.
- Guest passes may be issued only with signed permission from an Administrator no later than the day prior to the dance.
- Guest may not be younger than 14 years old nor older than 20 years old (unless they are currently enrolled at the campus or have Administrative approval).
- Guest must have proper school ID or valid picture ID in their possession when attending dances.
- Class specific royalty for Prom/Homecoming dances should be as follows:
  - King/Queen = Seniors
  - Prince/Princess= Juniors
  - Duke/Duchess = Sophomores
  - Court Attendees = Freshmen

## Other Social Events

See APO and STUGO Advisor for more information

1. Follow the Social Events Steps and use the checklist for Assemblies and related activities.
  2. Follow the Social Events Steps and use the checklist for Spirit Week and related activities.
  3. Graduation is handled by the AP for Activities.
- 
- When planning an activity, check the calendar for availability of the date, facility and scheduling of the proposed event
  - Submit an Activity/Facility Request and obtain approval by the APO. An unauthorized or unscheduled event will not be permitted.
  - Follow Purchasing Department procedures for all materials/supplies needed for the event
  - Workshops & Seminars must have written justification of presentations and cost(s) related to special speakers.



## Appendix

Club Constitution Form .....
Club Sponsor Form .....
Club Meeting Minutes Form .....
Student Activity Fundraiser Approval Form.....
Joint Ventures .....
Sales Reconciliation.....
Ticket Sellers Worksheet.....
Gift Letter .....

**Club Constitution/Bylaws**

**Article I: Name.**

The name of the club (Club) shall be:

organized in the Phoenix Union High School District (PXU) at (School):

**Article II: Purpose.**

**Article III: Membership.**

**Article IV:**

**Duties**

**Semester**

**Year**

President:




Vice President:




Treasurer: Secretary:




Other:




**Article V: Election of New Officers (description of procedures).**

**Article VI: Committees (optional).**

**Article VII: Depositing of Funds.**

All funds received by the Club must be deposited in & expended from the School Bookstore or through appropriate staff at CEE if a Bookstore is not available, following the PXU's handbook for sponsors.

**Article VIII: Sponsor/Custodian.**

The Club shall be a student-led organization. A certified employee (Club Sponsor) shall supervise the Club & Club members shall follow the Club Sponsor's advice about District/School rules & policies. The Club Sponsor or other certified employee shall supervise all club meetings and club activities. A PXU employee who functions as a Club Sponsor for a club that is philosophical, political, or religious in nature shall act in compliance with Board Policy JJAB and attend meetings only in a supervisory, non-participatory capacity, e.g., for custodial purposes. See Board Policy JJAB for further guidance.

**Article IX: Meetings.**

Meetings will be held on campus, during non-instructional time, with the club sponsor in attendance.

**Article X: Amendments & Ratification.**

Section 1. Amendments to the constitution must be proposed & accepted by at least a 2/3 majority vote of the membership.

Section 2. Ratification requires a 2/3 majority vote of membership.

**Article XI: Anti-Discrimination.**

The PXU does not discriminate on the basis of race, color, religion, national origin, sex, disability, age, sexual orientation, gender identity, gender expression, or immigration status in admission & access to its programs, services, activities, or in any aspect of their operations & provides equal access to the Boy Scouts & other designated youth groups. The lack of English language skills shall not be a barrier to admission or participation in the PXU's activities & programs. The PXU also does not discriminate in its hiring or employment practices. The following employees have been designated to handle inquiries regarding the nondiscrimination policies:

**Aviso Contra la Discriminación.**

PUHSD no discrimina en base a la raza, el color, la religión, el origen nacional, el sexo, la discapacidad, la edad, orientación sexual, identidad de género, expresión de género o estatus migratorio para la admisión y acceso a sus programas, servicios, actividades, o en cualquier aspecto administrativo, y proporciona un acceso igualitario a los Boys Scouts y otros grupos de jóvenes designados. La falta del conocimiento del idioma inglés no deberá ser una barrera para la admisión o participación en cualquiera de las actividades o los programas del Distrito. Phoenix Union High School District tampoco discrimina en sus prácticas de empleo y contratación. Los siguientes empleados han sido designados para manejar las preguntas sobre las pólizas contra la discriminación:

**Title IX Coordinator**  
 Mr. Manny Silvas, Talent Executive Director  
 4502 N. Central Ave  
 Phoenix, AZ 85012  
 (602) 764-1539  
 msilvas@phoenixunion.org

**Section 504 Coordinator**  
 Ms. Wendy Collison, ESS Director  
 4502 N. Central Ave  
 Phoenix, AZ 85012  
 (602) 764-1025  
 Collison@phoenixunion.org

Assistant Principal of Opportunities

Date

# Club Member/Sponsor Form

Total: \_\_\_\_\_

Please type or legibly print all information

SCHOOL INFORMATION		
School	Date Submitted	School Year
Club Name	Budget Control Group 850-                      -S	Code (Finance only)

We the members of the above noted club acknowledge Student Government is the recognized club over all campus clubs and as such all interest payments will be allocated to STUGO for the benefit of all students on campus.

SPONSOR INFORMATION	
Sponsor Name	Co-Sponsor Name

STUDENT OFFICERS		
Name	Student ID#	Title

STUDENT MEMBERS (do not include officers if listed above)			
Name	Student ID#	Name	Student ID#
1.		13.	
2.		14.	
3.		15.	
4.		16.	
5.		17.	
6.		18.	
7.		19.	
8.		20.	
9.		21.	
10.		22.	
11.		23.	
12.		24.	

Please allow CEE 24-48 hours for processing to be complete. Thank You!

# Club Meeting Minutes

Req #: \_\_\_\_\_

Please type or legibly print all information

School \_\_\_\_\_ Date of Meeting ----- Time of Meeting ---

Club Name \_\_\_\_\_ Budget Control Group \_\_\_\_\_ # of Members Present \_\_\_\_\_  
SSO- \_\_\_\_\_ . S \_\_\_\_\_

Sponsor Name (present) \_\_\_\_\_ Co-Sponsor Name (present), \_\_\_\_\_

Treasurer \_\_\_\_\_ Account Balance \_\_\_\_\_

Old Business, \_\_\_\_\_

NEW BUSINESS(Detailed sub Action) \_\_\_\_\_  
NTE or Dollar Amount \_\_\_\_\_

Motion Made By \_\_\_\_\_ Seconded By \_\_\_\_\_

# In Favor \_\_\_\_\_ # Against \_\_\_\_\_

NEW BUSINESS(Detailed sub Action) \_\_\_\_\_  
NTE or Dollar Amount \_\_\_\_\_

Motion Made By \_\_\_\_\_ Seconded By \_\_\_\_\_

# In Favor \_\_\_\_\_ # Against \_\_\_\_\_

Adjournment Moved By: \_\_\_\_\_ Seconded By: \_\_\_\_\_

Club Officer Signature(s): \_\_\_\_\_  
\_\_\_\_\_

Club Sponsor Signature(s): \_\_\_\_\_

••Must attach the member signature sign-in sheet with club name, date, and signatures!••

# Student Activity Fundraiser Approval Form

This request must be turned in to the APO at least one week before the date of the requested activity.

Club Name/Organization: \_\_\_\_\_

Event/Fundraiser Name: \_\_\_\_\_

Proposed Date: \_\_\_\_\_ Time: \_\_\_\_\_

Place: \_\_\_\_\_

Purpose of fundraiser: \_\_\_\_\_  
\_\_\_\_\_

Vendor, if applicable: \_\_\_\_\_

_____	_____
Club President Signature/Organization	Date
_____	_____
Sponsor Signature	Date
_____	_____
Student Government Rep. Signature	Date
_____	_____
APO Signature	Date

The Phoenix Union High School District neither endorses nor sponsors the organization or activity represented in this material. The distribution or display of this material is provided as a community service.

# Joint Venture Fundraising Form

Please type or legibty print all information

\*Club meeting minutes must be attached

## SCHOOL INFORMATION

School

Club:

## ORGANIZATION INFORMATION

Organization Name:

Officer:

## DESCRIPTION OF FUNDRAISER

Purpose:

Proposed Date(s):

Product or Se1Vice Sold:

Proposed Vendor:

## ALLOCATION OF PROCEEDS

\*Allowtion of ovocee<ls are based on level of effort evnonded by ea<:he:rouo

Club Percentage (%)

Organization Percentage(%)

## REQUIRED SIGNATURES

Club Sponsor:

Organization Officer:

APO:

Principal:

Finance:

Date:

• Attorney General Opinion No. 1 32 - "Even though the statute states that a.IImonies raised by the effotts of students in pursua.nce of or in connection with all activitiesof student organizations are student activities monies, it is our opinion that monies raised in conjunction with a.nother organization, could be divided appropriately between the two groups, based upon a negotiated agreement which reflects theeffotts expended by both groups".







# GIFTS OF FUNDS, EQUIPMENT, SUPPLIES, AND/OR MATERIALS

## *Phoenix Union High School District*

*Please refer to Operational Procedure K.260.0P.1*

A gift valued at more than \$300 is to be recommended for acceptance by the Governing Board. Governing Board approval must be obtained prior to funds being released or spent. In order to obtain Governing Board approval, the following information must be completed and approved by the Principal or Site Administrator, Incomplete information may delay the approval process and delay funding.

- List of item(s) with estimated value(s) *(NOTE: If equipment is donated, list description, serial number, & donor's estimated value of each item.)*
- Name, address and phone number of donor *(NOTE: if donor is an organization or business, please give name, address and phone number of the contact person.)*
- Name and phone number of contact person on the campus where the equipment/supplies will be located.
- What is the purpose for which the funds/materials will be used (campus, department, class)?
- How were funds/materials solicited?
- What is the purpose/mission/goals and website of donor's organization/business?

Principal/Site Administrator Approval	Date
---------------------------------------	------

## Self-Quiz

1. The very first thing I must do for my existing club is:
  - a. Select the fundraisers we will have.
  - b. Complete the club sponsor form to the Bookstore.
  - c. Establish a meeting schedule.
  
2. All club requisitions must have meeting minutes attached when submitted.  
TRUE      FALSE
  
3. Fundraisers should all be approved through Student Government prior to submitting a requisition.  
TRUE      FALSE
  
4. I can spend club funds any way I believe is best for the club.      TRUE      FALSE
  
5. When putting on an event with my club or purchasing a service, I can sign the agreement for the vendor.      TRUE      FALSE
  
6. I must go to \_\_\_\_\_ to pick-up a sponsor check and sign for it.
  
7. The District will pay for expenses, including trips, even if our club balance is negative.  
TRUE      FALSE
  
8. Meeting minutes must be signed by all club officers in attendance and all who attend the meeting must also sign in.      TRUE      FALSE
  
9. Tax Credits are non-refundable and transferrable.      TRUE      FALSE
  
10. Students can be authorized users on purchase orders.      TRUE      FALSE

Thank you for taking the time to Sponsor a Club.

*Each year the district asks that all club sponsors receive the Club Sponsor Handbook and return the following acknowledgement to the Student Activities Department.*

Student Activities Club Sponsor Handbook Agreement

I have read the information contained in the Student Activities Club Sponsor Handbook for Phoenix Union High School District 210 and agree to comply with the policies and procedures outlined.

Sponsor First & Last Name: \_\_\_\_\_

Sponsor Signature: \_\_\_\_\_

Club Name: \_\_\_\_\_

Date: \_\_\_\_\_

**\*\*Return this acknowledgement to your site Bookstore\*\***