# Caddo Parish School Board PTA Rules

The Caddo Parish School Board has rules that must be followed in addition to or in place of the National PTA and Louisiana PTA rules. See Departments - Auditing - Important Links and Forms (caddoschools.org/page/auditing).

## PTA - Principal Memo

This document must be completed annually by the Principal of the school, the PTA / PTSA President and Treasurer, and the School Sponsor. This form outlines all of the additional rules and regulations that all PTAs must adhere to.

### **Banking Rules:**

- The bank account for the PTA must be opened with a letter of permission from the Principal.
- The Principal cannot be a signer on the checking account.
- Provide a list of authorized signers to the Principal.
- Bank statements must be mailed to the school and reviewed by the Principal. E-Statements are not acceptable.
- A copy of all checks must be imaged on the bank statement.
- All checks must have 2 signatures.
- No debit cards, ATM cards, or checks written out to "Cash" may be issued.

### **Fundraising Rules:**

- All Fundraisers must be pre-approved by the Principal.
- A CPSB Fundraiser Form must be completed and given to the School's bookkeeper at least 2 weeks prior to the event.
- Schools should not conduct raffles, bingo games, or other gambling or games of chance. PTAs may sponsor these activities but cannot solicit or sell raffle tickets in the school or during school days at school sponsored events. PTAs must contact the LA Office of Charitable Gaming to obtain a Gaming License to sell tickets for or participate in games of chance.

#### **Local Level Guidance:**

- Caddo Parish School Board likes PTAs to use Local Level to keep school-related activities and groups organized under one platform for parental ease. However, the transaction fees are very high.
- PTAs must link their separate and unique bank account (not the school's account) on Local Level.
- The PTA can customize every part of the event/sale. The only thing
  they cannot do is the initial set up, which is done by the Local Level
  representative. It is important to work with the school bookkeeper
  or principal to make sure everyone is in the loop. PTAs have access
  to the website to make updates, customize it, and run reports.
- PTAs must complete fundraiser forms for every fundraiser, which are approved by the principal and submitted to the bookkeeper.
  - If a PTA uses Givebacks, it must be linked to the PTA's bank account. However, linking to the school's website will not be as easy. The GB fees are 3.95% + 95¢ per transaction. The PTA decides if it or if the buyer pays the fees.

TO: All Name of School PTSA Booster Chubs - 2023/024  You are required to meet the following conditions per Caddo Parish School Boad policy DKA - Booster Clubs and Outside Organizations:  Sign and return this form to the School Bookkeeper by Friday, August 4, 2023.  List the officers for the 2023/024 school year on the form located on the back of this memo. Include the following information:  Name  Contact phone numbers and/or email address  You must maintain minutes of all meetings of the organization and have duly elacted officers. The school principal, or a school employee designated by the principal, must be appointed to serve on the executive board. Submit minutes to the principal for review and permanent records.  The PTSA Boostet Chub principal with the summary of revenue expenditures and investments. The financial reports showing all receipts and expenditures by source, along with the summary of revenue expenditures and investments. The financial reports must be signed by an officer of the organization are to have/provide/ensure:  The PTSA Boostet Chub organizations are to have/provide/ensure:  The PTSA Boostet Chub organizations are to have/provide/ensure:  The remains the a letter on file giving permission from the principal to open a bank account and use the school's name.  Ensure the bank statements link the school's address so that all attements are and circetly to Name of School.  The school will only accept hard copies of statements from the bank. E-statements are NOT acceptable.  Ensure images of all checkes are included with the bank statement.  Provide the principal with a list of individuals who can sign the check. The principal thould not be a signer.  No on-line banking (transfers, debits, etc.).  In order to ensure the protection of both the old and the new treasurer, your financial records must be audited when you have elected a new treasurer. PTSA record must be addited annually in order to remain in good standing with the state PTA organization.  You MUST file Form 990 and any other app	ADDRESS  CITY, I.A. 22  (318) XXX-XXXX, XXXX		
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PTSA/Booster Chib Treasurer's Name PTSA/Booster Chib Treasurer's Signature	PTSA/Booster Club Name	Date	
	President's Name	President's Signature	
School Sponsor's Name School Sponsor's Signature	PTSA/Booster Club Treasurer's Name	PTSA/Booster Club Treasurer's Signature	
	School Sponsor's Name	School Sponsor's Signature	

CADDO PA	RISH SCHOOL BOARD IA-82(Rev.08/21)
	FUNDRAISING PROJECT Exhibit F
SCHOOL.	
YEAR:	
	For Office Use
THE FOLLOWING SHOULD BE COMPL	ETED BY THE SPONSOR <u>BEFORE</u> THE PROJECT BEGINS.
Name of organization	
School General Ledger Account Number	
Name of sponsor	
Type of project (Fundraiser Name)	
	snack compilance documentation (see instructions).
Business from which items are purchased	
Proposed starting date	Proposed ending date
	Projected (#"s ONLY)
Highlighted A. Number of units to be ordere	
cells contain B. Proposed sales price per uni	or ticket
formulas and C. Anticipated sales from the pr	
cannot be D. Estimated total cost of all un	
deleted. E. Anticipated profit (C minus D F. Proposed use of profit	-
P. Proposed use of profit	
Requested by	Date
Sponsor's Signature	
Approved by	Date
Principal's Signature	
THE FOLLOWING IS TO BE COMPLETED BY THE SPON	SOR WITHIN TWO WEEKS AFTER THE PROJECT IS ENDED
	fundraiser. Previous Fundraiser#
G (2). Total units received per invoice(s), including free iten	
H. Less units still on hand (Inventory).**	
(Please attach plans for items left in inventory)	
Less units given away as prizes or awards. **	Sales Price* Calculated
J. Less units lost, stolen, damaged or spoiled.**	Per I leit Sales
K Total units available for sale	0 x = \$ -
TO DE GIND GYANGOC TO SAIC	
L. ACTUAL funds collected (Should agree with ATTACHED	General Ledger print out of account)
, ,	
M. DIFFERENCE (K minus L)	\$ -
Explanation: Uncollected from students **	
Other: (A ttach explanation)	
TOTAL: Should agree with M	\$ -
N. A CTUAL funds collected: (Same as L)	\$ - *For multiple-priced
O. Less COST of all items (Should agree with checks	item sales, attach
written per General Ledger).	detail.
	**Attach appropriate
P. PROFIT or (Loss) on this project (N minus O)	\$ - list or form.
	g to the accuracy of the information and will maintain supporting cords that support this project for three years AFTER it is audited.
Submitted By	Pata
Submitted By Sponsor's Signature	Date
Reviewed By Principal's Senature	Date
	G DEPT, IMMEDIA TELY UP ON COMPLETION OF FORM
	ETOTOTTOTT