

Booster Club BOOT CAMP

From Basics to Transitions



Crush the Booster Basics

1. Organize:
 - a. Incorporate
 - b. Obtain EIN
 - c. Become a 501(c)(3)
 - d. State fundraising registration
 - e. State sales tax exemption
2. Maintain:
 - a. File corporate annual report
 - b. File state fundraising & sales tax renewals
 - c. File IRS Form 990 & state required renewals
 - d. File IRS Form 990
3. Operate:
 - a. Review, revise & share your bylaws
 - b. Include school staff as advisory, non-voting members
 - c. Encourage participation
 - d. Handle the money properly

Lift Your Accounting Standards

1. Approve an annual budget
2. Report budget-to-actual at each meeting
3. Control funds through:
 - a. Separation of controls
 - b. Using the 2-2-2 rule (2 people count cash, 2 people sign checks, 2 people reconcile bank accounts)

Leave Your Mark on New Recruits

1. Conduct a financial review
2. Organize your records
3. Meet with new officers and update bank signors

DIG DEEPER WITH PBUSA RESOURCES

<https://parentbooster.org/resources>

Organize

- PBUSA Quick Start Guide
- Sample Bylaws Generator
- Working Together for Success
- Booster Club Lifecycle Checklist
- DIY Guide – Obtain an EIN
- DIY Guide – Get Incorporated

Control Finances

- Sample Budget
- Guide to Conducting an Internal Financial Review
- Sample Financial Controls
- The Embezzler Next Door
- DIY Guide – Get Your Books Together for the 990
- DIY Guide – Filing IRS Form 990

Leave Your Mark

- Smooth Transitions: Organize Your Records
- Smooth Transitions: Five Tips for Changing Officers
- Smooth Transitions: Officer Transition Checklist

Parent Booster USA provides information, training, and help to set up and operate booster clubs and PTOs.

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ParentBoosterUSA
We Know Booster Clubs