

Book	Policy Manual
Section	Policies for the Board, SSO Special Update
Title	Special Update - School Support Organizations - November 2025 Overview
Code	01 - Overview
Status	

WISCONSIN OVERVIEW AND COMMENTS

Special Update - School Support Organizations November 2025

Neola is partnering with Givebacks, Inc. on this special update on all policies related to School Support Organizations. This special update, created with coordination between Neola, Givebacks, and local Wisconsin legal counsel is provided to our WI clients as a part of Neola's regular update process.

Why This Is Important for School Districts

- 1. Student Protection** - These policies ensure fundraising is **voluntary**, age-appropriate, and does not coerce or exploit students. They also prohibit unsafe practices (like raffles or unapproved advertising) and protect students from exposure to inappropriate content.
- 2. Financial Transparency & Legal Compliance** - All fundraising activities—whether student-led, parent-run, or externally supported—must follow **strict financial controls**, comply with **GASB 84**, and meet **state and federal reporting standards** (e.g., F-33 Federal Financial Report). This promotes **accountability**, reduces the **risk of fraud**, and ensures **donor confidence**.
- 3. Equity & Integrity** - Policies ensure that gifts, grants, and donations support **educational equity** and are distributed fairly. They protect schools from accepting contributions that may impose future obligations, create conflicts of interest, or lead to favoritism.
- 4. Community Involvement with Boundaries** - While encouraging engagement from PTAs, booster clubs, and donors, the policies clearly define the **autonomy** and **responsibilities** of these groups, ensuring they operate **independently** while aligning **with District values**.
- 5. District Branding and Liability Protection** - Policies restrict the use of the District's name, logo, facilities, or personnel in **unauthorized fundraising or promotional efforts**, guarding against misrepresentation, reputational harm, or unintended political/ideological association.
- 6. Support for Student Leadership** - By allowing students to manage their own activity funds (with oversight but without adult control), these policies encourage **real-world learning**, **leadership**, and **financial responsibility**.

All production-related materials and questions should be directed to the Coshocton Office at 632 Main Street, Coshocton, Ohio 43812 (phone 800-407-5815, fax 740-622-2557). Billing questions should be directed to the Stow Office at 3914 Clock Pointe Trail, Suite 103, Stow, Ohio 44224 (phone 330-926-0514, fax 330-926-0525).

Please make any revisions on the BoardDocs software using the instructions provided to you. You may direct questions related to content to your Neola Associate. Questions regarding the software should be directed to the BoardDocs help desk staff.

If a District chooses not to adopt a policy or administrative guideline, the District is still obligated to follow applicable Federal and State laws relating to that topic.

The proposed new, revised, and replacement policies, administrative guidelines, and forms included in this update have been thoroughly prepared and reviewed by Neola's legal counsel for statutory compliance. If you make changes or substitute in their entirety policies or other materials of your own drafting, those materials should be reviewed by your legal counsel to verify compliance. Neola does not review District-specific edits to update materials or District-specific policies for statutory compliance.

If a policy or guideline is marked as a revision, the changes have been marked in bold (to add material) and crossed out (to delete material). As you review a revised policy or guideline, you may accept one, many, or all of the changes provided. If a policy or guideline is marked as a replacement, enough changes have been made to justify a complete, clean replacement copy. As you review a replacement policy or guideline, you should also check the materials you have in your current policy or guideline to see if there is some specific wording you want to be included in the replacement policy. If so, a copy of any wording to be added and where it should be inserted should be forwarded with the replacement policy or guideline when it is returned to the Coshocton office for processing.

If the District authors language and adds it to a policy template or deletes content that is not marked as a choice in the policy template, then these actions will constitute District-specific edits.

Policies to be deleted from the policy manual require Board action to rescind the policy.

Your Neola Associate will contact you soon to schedule an appointment to review this update and ensure you are current on it and previous updates.

If you are not an administrative guidelines client, you did not receive those materials in this packet. Contact your Associate for more information about becoming an administrative guidelines client.

Processing Update Materials

Revisions to your policies and administrative guidelines should be made using the BoardDocs software, following the instructions provided.

Using Header Box Options in BoardDocs

Each policy and administrative guideline has multiple header boxes in BoardDocs that provide essential information in addition to the document's title and code number. (NOTE: All the header boxes are visible only when editing is turned on; in view mode, only the header boxes with content are shown.)

Adopted: The "Adopted" header box indicates when the policy or guideline was first adopted, and that date never changes as long as the policy or guideline is active.

Last Revised: Retaining the history of each policy and guideline is essential for legal and administrative reasons, so BoardDocs provides options for such retention. Immediately beneath the "Adopted" header box is the "Last Revised" header box that indicates the last time the policy or guideline was changed, and this box is updated by Neola Production each time a revision is submitted. Any revision dates between the initial adoption and the latest revision are usually located at the bottom of the document, just above the Neola copyright. (Again, these dates are updated by Neola Production with each submission and should correspond to Board meeting minutes, except for TC notations for technical corrections.)

Last Reviewed: A new "Last Reviewed" option now exists for indicating that you have reviewed the policy or guideline and have found it to be sufficient as presently written. Since no revision is being made in these situations, there is no record that the document was reviewed. A typical example would be a technical correction that isn't needed on your document, or a revision to an option that you do not have or want. In such cases, because the copyright has changed but not any content, you would want to show that your document is current as of the new copyright date even though it has the older copyright date from the previous version of the Neola template. Now you have the option to indicate that you have reviewed the document even though no revision was made by putting the review date in the new "Last Reviewed" header box. This is also a handy feature for those Boards that use a policy review regimen in addition to revisions made through the Neola Update process.

Any questions about how to use these BoardDocs header box features should be directed to your Neola Associate, or you may contact BoardDocs Support at 1-800-407-0141.

District-Specific Materials

If the District chooses, during any step of the Update process, to incorporate District-specific material into a new policy or guideline that has been proposed or to insert District-specific material into a current policy or guideline for which revisions have been proposed in an update issued by Neola, then the District agrees to hold Neola harmless for those District-specific edits and acknowledges that Neola's warranty for legal challenges to that District-specific language in that policy or guideline will not be in effect. In addition, Neola retains ownership of the text from the original policy template that remains in a policy to which District-specific material has been added. District-specific materials include the following:

1. Materials from the District's existing materials that the District requests be incorporated during the drafting process;

2. New materials that the District develops in their entirety and exclusive of Neola;
3. Revisions or deletions that substantively depart from Neola's templates; and
4. Outdated material that a District did not keep current with Neola updates.

Further, Neola does not recommend the use or incorporation of District-specific materials. Neola will, at the request of the District, incorporate District-specific materials into the licensed materials, with the implicit understanding that the District bears all risks associated with the District's decision to request that such District-specific materials be incorporated. Neola reserves the right to but is not obligated to, advise the District to seek its own legal review of District-specific materials.

Notice Regarding Legal Accuracy

Neola is vigilant in providing policy language to clients that has been vetted for legal accuracy by outside legal counsel. Should questions arise as to the legal compliance or accuracy of Neola materials, it is our expectation that Neola's counsel would have the opportunity to assist in the resolution of such a claim. Please notify the Neola corporate office if an issue arises in which such a review or assistance is necessary.

Policies in this update have been reviewed by Renning Lewis & Lacy, s.c. for consistency with Federal and State law.

Policy Revisions

Policy 5830 - Student Fundraising (Revised)

This policy governs student fundraising activities within the school district. It ensures that fundraising is conducted in a controlled, ethical, and educationally appropriate manner. Fundraising must be for school-related purposes, approved by the Principal (and District Administrator if above a certain threshold), and comply with Federal dietary and financial regulations.

This policy protects students from coercion, ensures transparency and accountability in fund management, aligns fundraising with educational goals, and ensures compliance with legal and health standards. It also maintains the integrity of the school environment and prevents misuse of school resources.

The revision has technical corrections, financial requirements, additional oversight options, and cross-references to other policies. These revisions are recommended but not required.

Policy 6605 - Crowdfunding (Revised)

This policy regulates the use of online crowdfunding platforms to raise money or resources for district-approved educational activities, classrooms, or school-related programs. It ensures that crowdfunding activities align with the District's educational mission, maintain financial transparency, and protect student privacy. It also prevents misuse of school branding and resources, ensures legal compliance, and protects donors by requiring the use of secure, low-fee platforms.

The revision adds crowdfunding platforms and additional monitoring requirements. These revisions are recommended but not required.

Policy 6608 - Accountability And Oversight Of Fundraiser And Crowdfunding Disbursements (New)

This policy states that all funds raised through student, parent, or private group-led fundraising and crowdfunding efforts—whether managed by the district (custodial) or by outside groups (non-custodial)—are properly documented, reported, and aligned with State and Federal financial standards, including GASB 84 and Federal reporting requirements. It requires detailed profit-and-loss reports, receipts, and records of how funds are spent or donated to the district. The policy also outlines consequences for non-compliance. This helps protect the integrity of school financial operations and maintains trust with the public and donors.

This new policy provides additional accountability for fundraising and crowdfunding activities. It is strongly recommended but not required for adoption.

Policy 6610 - Nondistrict-Supported Student Activity Accounts (Revised)

This policy allows the creation and maintenance of student activity accounts for approved activities that do not receive financial support from the District. While the District holds these funds in custodial accounts (per GASB 84), students are fully responsible for managing the funds—including budgeting and spending—without any financial control or approval from

District staff. Staff advisors may supervise but cannot make or influence financial decisions. These activities must follow established guidelines for fundraising, accounting, and use of District resources. The policy requires that student-led, self-funded activities be managed independently but responsibly, with proper safeguards in place to comply with legal and financial regulations.

The revision adds an accounting requirement and includes technical corrections. These revisions are recommended but not required.

Policy 7230 - Gifts, Grants, and Bequests (Revised)

This policy outlines how the District accepts and manages gifts, grants, and bequests from individuals or organizations. The Board retains the right to approve, reject, or define the use of any donation. Accepted gifts become the property of the District and must align with Board policies and applicable laws. The policy also cites non-discrimination in the acceptance of donations and establishes reporting, tax acknowledgment, and transparency requirements. This helps create a process that handles donations ethically, legally, and transparently, protecting both the District and the donor. Additionally, it helps prevent the acceptance of gifts that could create liability, favoritism, or conflicts of interest, maintaining the trust of the school community.

The revision includes additional accountability and protections for the Board and District. These revisions are recommended but not required.

Policy 9211 - School Support Organizations (Rescind)

This policy is rescinded and renumbered to replacement Policy 9215 for better alignment with the numbering used by all states in the Neola network.

Policy 9215 - School Support Organizations (Renumbered/Replacement)

This policy establishes the standards, responsibilities, and oversight for school support organizations (SSOs)—such as PTAs, PTOs, Booster Clubs, and educational foundations—that raise funds or donate resources to support District schools and activities. The policy defines what constitutes an SSO, outlines approval and documentation requirements, and ensures transparency and accountability in financial activities. The policy protects the District's integrity, financial transparency, and legal compliance while supporting valuable community involvement. It ensures SSOs operate independently yet responsibly, aligning their goals with those of the District without creating liability for the school system. It also ensures donations and fundraising are managed ethically, helping to maximize benefits to students while safeguarding public trust.

This policy has been redrafted by Neola legal counsel. Its re-adoption is strongly recommended, as it contains important text that satisfies state and federal accountability requirements.

Policy 9700 - Relations with Non-School Affiliated Groups (Revised)

This policy sets clear rules for how non-school-affiliated (outside) groups may interact with students, staff, and District facilities. It prohibits the use of District resources—including names, logos, facilities, or personnel—for advertising, promotion, or fundraising. The policy balances the value of community involvement with the need to safeguard educational priorities and legal responsibilities.

Neola is reissuing this policy with one revision. The policy is referenced in several of the update policies in this special update, and clients may desire to confirm their original choices as a part of this update process. Finally, the revision in the non-discrimination statement is consistent with the Vol. 35, No. 1 - Nondiscrimination - November 2025 Special Update.

Policy 9700.01 - Advertising and Commercial Activities (Revised)

This policy outlines the rules and limitations for advertising and commercial activities involving students, staff, or District property. It defines advertising broadly and establishes strict controls over when, where, and how commercial messages or promotions may appear in schools. By balancing community involvement with strict oversight, the policy ensures any commercial presence aligns with the District's mission and public trust.

The policy contains expanding restrictions in the option for political advertising. In addition, this policy is referenced in several of the update policies in this special update, and clients may desire to confirm their original choices as a part of this update process. Finally, the revision in the non-discrimination statement is consistent with the Vol. 35, No. 1 - Nondiscrimination - November 2025 Special Update.