

PASADENA INDEPENDENT SCHOOL DISTRICT  
FINANCIAL COMPLIANCE

Student Fund 865 Self Assessment

School \_\_\_\_\_ Date \_\_\_\_\_

Club \_\_\_\_\_ Sponsor \_\_\_\_\_

The purpose of this self-assessment is to provide you with a tool to evaluate your existing processes and controls and to identify any risk of loss through error, noncompliance or theft. Please use this tool to self-evaluate your campus/department for compliance with District policies and guidelines and to make improvements where necessary. If you need assistance, please contact Financial Compliance at 713-740-0025 or 713-740-0950.

Test Assessment		Yes or No	Self-Identified Recommendations for Improvement for assessment where "No" was answered
<b>A</b>	Does club nominate and elect officers, one being a Treasurer?		
<b>B</b>	Are officers elected on a yearly basis?		
<b>C</b>	Are club's bylaws current and school specific?		
<b>D</b>	Is club's officer contact form current and updated throughout the school year if changes occur?		
<b>E</b>	Are club's bylaws, officer contact list, meeting minutes and treasurer's reports on file in the campus financial office or with campus designee?		
<b>F</b>	Are events and transactions all voted on and recorded in meeting minutes?		
<b>G</b>	Does club spend only available funds?		
<b>H</b>	Does club create monthly treasurer's reports?		
<b>I</b>	Are cash collections set up and approval received before the start of all cash collecting events?		
<b>J</b>	Does club have only allowable fundraisers that have been preapproved by campus administrator?		

<b>K</b>	Are pre sale fundraising items receipted in full before placing order?		
<b>L</b>	Are profits from all fundraisers distributed equally among club members?		
<b>M</b>	Is all money collected for charitable donations deposited into the 865 account?		
<b>N</b>	Are all charitable donations to a nonprofit organization, issued with a District check and not to individuals?		
<b>O</b>	Are all records retained according to the District Records Management Schedule?		
<b>P</b>	Has sponsor viewed Student Clubs Fund 865 e-Courses available in Eduphoria?		

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**Revised Sept. 2022**