

Annual Organization Approval Form: 2025-2026

Board Policy 1230 requires that all groups desiring to be recognized as school-connected organizations request authorization from the Board. The following questionnaire addresses each of the required components of the Board Policy, as well as allows the District to comply with the requirements of Governmental Accounting Standards Board (GASB) Statement Number 39.

This report is for the previous fiscal year (July 1 through June 30) and is due to the Assistant Superintendent of Business Services by September 30, 2025.

Date of Application for Approval: _____

Name of Organization: _____

Employer Identification Number (EIN): _____

Attach a copy of Determination Letter or a copy of Application for Determination.

1.) Provide the name, address, phone number, email and title of all officers.

Name: _____	Name: _____
Address: _____	Address: _____
Phone Number: _____	Phone Number: _____
Email: _____	Email: _____
Title: _____	Title: _____
Name: _____	Name: _____
Address: _____	Address: _____
Phone Number: _____	Phone Number: _____
Email: _____	Email: _____
Title: _____	Title: _____

2.) A brief description of the organization's purpose, including any membership qualifications or quotas.

3.) A list of specific annual objectives.

4.) Indicate the desired use for any money remaining at the end of the year if the organization is not continued or not authorized to continue in the future.

5.) Provide the following financial information for the past fiscal year (July 1 to June 30):

(A) Beginning Bank Balance (July 1)	
(B) Total Receipts for the year (July 1-June 30)	
(C) Total Expenditures for the year (July 1-June 30)	
(D) Ending Bank Balance (June 30) (should=A+B-C)	

6.) (a) The name and address of the bank where the organization's account is located.

(b) The names of those authorized to withdraw funds.

7.) Provide a copy of evidence of liability insurance.

8.) Obtain signature of a site administrator who supports the request for approval, (Principal, Vice Principal or Assistant Principal) and signature of the school-connected organization President or Treasurer.

Site Administrator Signature	Title	Date
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Submitted by:

President/Treasurer Signature	Title	Date
School-Connected Organization		

Checklist of SCO Items

**Note - items must be submitted with the approval form to the Business Services office by September 30, 2025*

- *Annual Organization Approval Form*
 - Date of Application for Approval (date submitted to K. Murphy)
 - Name of Organization
 - TIN
 - Attach a copy of *Determination Letter* or a copy of the *Application for Determination*
 - (1) Names, addresses, phone numbers, email addresses and titles of all officers
 - (2) Organization's purpose, including any membership qualifications or quotas
 - (3) A list of specific annual objectives- what are you raising money for (be *fairly* specific)
 - (4) Desired use of leftover funds
 - (5)
 - Beginning bank balance as of July 1, 2025
 - Total receipts for last year (July 1, 2024 - June 30, 2025)
 - Total expenditures for last year (July 1, 2024- June 30, 2025)
 - Ending bank balance as of June 30, 2024
 - (6a) Name and address of the bank where the organization's account is located
 - (6b) The names of those authorized to withdrawal funds
 - (7) Copy of evidence of liability insurance
 - (8)
 - Administrator's signature
 - SCO president's/treasurer's signature

At the same time when SCOs submit the *Annual Organizational Approval Form* requesting Board of Education approval, the following must also be submitted to the Business Services Office:

- A current copy of the **SCO-approved Constitution** that addresses or includes:
 - Name and purpose of the SCO
 - Names of executive board members or officers, with positions and duties of each position defined, and their term limits
 - Membership
 - Method of amendments to the constitution, such as by whom, what percent of members, and/or by ballot
 - Method of adoptions or ratification of constitution and any subsequent amendments
- A current copy of the **SCO-approved Bylaws** that addresses or includes the following if not in the Constitution:
 - Duties and powers of the executive board or officers
 - The composition and membership of committees
 - Successions
 - Elections and qualifications for office
 - Finances, including a statement of internal controls, authorization of financial activities, and who can preapprove transactions.
 - Meeting schedule for regular and special sessions, including time, manner frequency, definition of a quorum, and who shall conduct meetings. (*Reminder- the procedures and meetings shall be governed by Roberts' Rules of Order or a similar code. Minutes of the*

meetings shall be kept and read for approval at succeeding meetings. Actions taken by the executive committee shall be reported to the membership at large.)

- **Statements of Understanding** (copy and paste these statements directly into your bylaws)
 - The district has the express right to review and/or audit SCO's financial statement to help ensure their financial integrity.
 - If the superintendent considers it necessary, he/she may revoke an SCO's authorization to conduct activities at the school and elsewhere in the district.
 - The SCO acknowledges it must have its own tax identification number (TIN)
 - The SCO must be officially recognized as a tax-exempt organization under internal revenue code section 501(c)(3)
 - The SCO is not authorized to act as an agent of the school or district.
 - No individual will personally financially benefit from the activities the SCO conducts.
- Any/all other information that assists SCOs with decision-making.