

School-Connected Organizations Workshop

Spring 2026



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SCHOOL DISTRICT

Sherrey Giberson, Risk Management Technician Lead

Amy Scoville, Administrative Assistant, Risk Management

Sarah Magaña, Fiscal Compliance Specialist

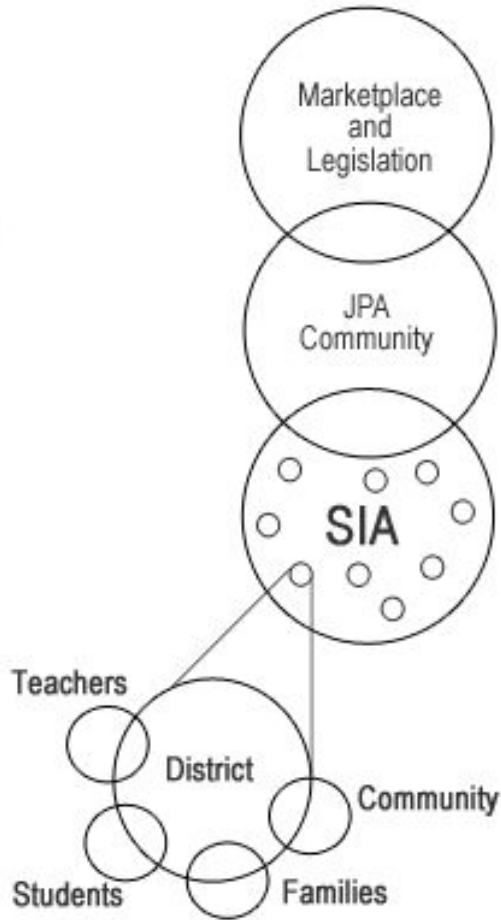
Jennifer Serran, Schools Insurance Authority - Dir. Rsk Mgmt



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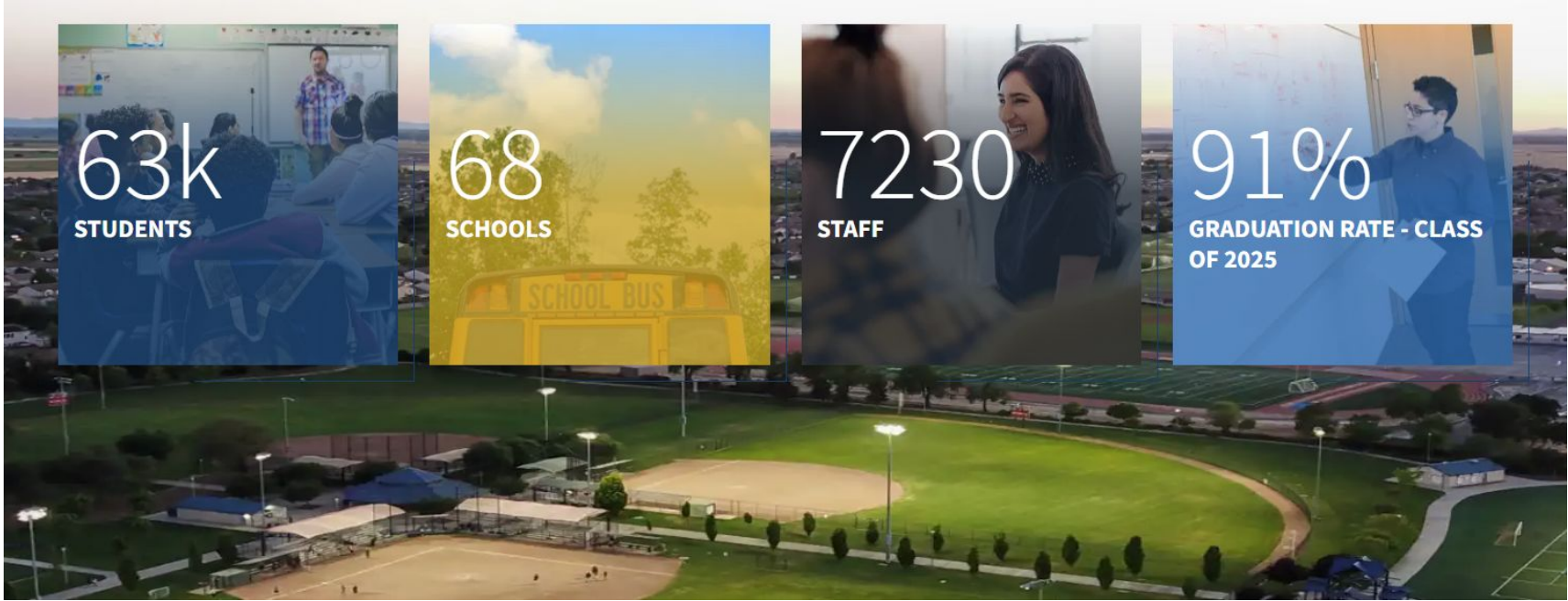
Partnering Relationships



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Our District



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Agenda

- Who's Who?
- SCOs partnering with EGUSD
- Organization Structure & Goals
- Fundraising
- Purchasing & Donations
- Facilities Use
- Insurance
- Invitational Events & Competitions

Who's Who?

PTA, PTO & Boosters = SCO

- Formed by parents, community members, and staff members
- Fundraising and/or support district activities and extracurricular programs
- Support student participation
- Not included in the District financials or audit

I.e.; Athletic & Performing Teams, Music, Theatre, Clubs, Jog-a-thons, Overnight Field Trips (e.g. Grad Night)

Associated Student Body (ASB) & Educational Activities (EA)

- Composed of currently enrolled students
- Fundraising, Activities, and Expenditures driven by Student Body or Advisors/Coaches
- Included in the District's financials and annual audit

School-Connected Organizations

- Function independently and are legally separate from the district with their own:
 - Employer Identification Number (EIN)
 - Bank account
 - Constitution or Bylaws
 - Officers
 - Name and Logo
 - Insurance coverage
 - Fliers/ads to include, “This is not an Elk Grove Unified School District sponsored program and EGUSD accepts no liability or responsibility for this program/activity.”



School District

- Provides guidance and oversight for all ASB/EA activity
- Multiple departments support goals and projects that ASB/EA and SCO fundraise for (beautification projects, scoreboard, additional hours for library technicians, playground equipment, excursions)
 - *Budget, Accounting, Purchasing, Facilities, Athletics, Human Resources, Payroll, Food & Nutrition, and Business Services*
- Help ensure compliance with Education Code, Board Policies, Administrative Regulations, and State and Local Laws
- Provide guidance to organizations for financial procedures and liability protection



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Education Code 51521

“No person shall solicit any other person to contribute to any fund or to purchase any item of personal property, upon the representation that the money received is to be used wholly or in part for the benefit of any public school or the student body of any public school, unless such person obtains prior written approval of either the governing board of the school district in which such solicitation is to be made or the governing board of the student body represented to be benefited by such solicitation, or the designee wither of such boards.”

[Education Code Section 51521](#) means that an outside organization may not legally operate unless and until it obtains the prior written approval of the district’s governing board or its designee.



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Board Policy & Administrative Regulation 1230

< Board Policy Manual



>> Policy 1230: School-Connected Organizations

Status: ADOPTED

Original Adopted Date: 10/03/1994 | Last Revised Date: 11/26/1997 | Last Reviewed Date: 11/26/1997

[see more](#)

The Board of Education recognizes that parents/guardians may wish to organize clubs for the purpose of supporting the educational program and/or extracurricular programs such as athletic teams, debate teams, and musical groups. The Board supports such activities and welcomes parental interest and participation. Parent/guardian clubs shall be especially careful not to seek advantages for the activities they support if those advantages might be detrimental to the entire school program.

The Board requires parent/guardian clubs to have a written statement of purpose and bylaws. The Board recognizes that these organizations are independent of the school or district. In order to protect the district and students, the Superintendent or designee shall establish appropriate controls for the relationship between such organizations and the district.

Groups desiring to be recognized as school-connected organizations shall request authorization from the Board in accordance with conditions established in administrative regulations.

Policy Reference Disclaimer: These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the Governing Board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State

11 CCR 300-312.1

5 CCR 15500

5 CCR 15501

5 CCR 15575-15578

5 CCR 4900-4965

Bus. Code 17510-17510.95

Bus. Code 25608

Ed. Code 200-262.4

Ed. Code 35160

Ed. Code 38130-38138

Description

[Fundraising for charitable purposes](#)

[Food sales in elementary schools](#)

[Food sales in high schools and junior high schools](#)

[Requirements for foods and beverages outside the federal meals program](#)

Nondiscrimination in elementary and secondary educational programs receiving state or federal financial assistance

[Charitable solicitations](#)

[Alcohol on school property; use in connection with instruction](#)

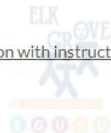
[Prohibition of discrimination](#)

[Authority of governing boards](#)

[Civic Center: Act; use of school property for public purposes](#)

[EGUSD Board Policy 1230](#)

[EGUSD Administrative Regulation 1230](#)



Organizational Structure & Goals

Bylaws

- Must be reviewed and approved by organization officers annually
- Reflect the date of approval in minutes
- Information to be included: Name, Date, Bylaws, SCO Board contact information, Purpose, Annual Objectives, Bank Information



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Organization Goals

Budget: What are the fundraising goals for the year? Collaborate with school administration and leadership to determine a wish list.

Fundraise: Coordinate with your school site administrator so fundraising does not conflict with other school priorities or events.

Spend funds: Sponsor events, supplies, student activities, clubs, teams, beautification projects, staff appreciation.



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Raffle and Games of Chance

What is a raffle or game of chance?

If a participant is required to purchase a ticket for an opportunity to win a prize. The drawing is considered a raffle and is subject to [California Penal Code 320.5](#). (Raffle Tickets or Bingo Cards Purchased, etc...)

Who can host a raffle or game of chance?

Eligible private and nonprofit organizations who registered with the Department of Justice.

Can the district/school host a raffle?

No. School Districts are considered a Government Organization, not a non-profit. EGUSD is not allowed to host events with raffles or games of chance.

Is a Silent Auction considered a raffle?

No. Silent Auctions are not a raffle or game of chance. Only the highest bidder is paying, they are the only one contributing money for the tangible item or experience.



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Raffles and Games of Chance

Collaborate with Principal, Advisor, and/or Coach on fundraising events for the year

Beginning of School Year

Host Event, Track Sale of Tickets, Prizes Distributed, and Proceeds Made

Day of Event

At least 60 Days Before Events

Review Raffle Registration Checklist and Complete **Form CT-NRP-1** and submit to:

The Office of the Attorney General
Registry of Charitable Trusts

Registration Period is January 1st-December 31st

Complete **Form CT-NRP-2** and submit to:

The Office of the Attorney General
Registry of Charitable Trusts

California Penal Code 320.5: Due by **February 1st**

After Event



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ROB BONTA

Attorney General

Raffles, Bingo, and Games of Chance

[HOME](#) [ABOUT](#) [MEDIA](#) [CAREERS](#) [REGULATIONS](#) [RESOURCES](#) [PROGRAMS](#) [APPOINTMENTS](#)

Nonprofit Raffles

[Home](#) / [Charities](#) / [Nonprofit Raffles](#)

Raffle Registration Overview

The raffle registration covers raffles conducted during a calendar year, from January 1 to December 31.

You can apply for a raffle registration as early as November for the following year and the registration is valid for the entire calendar year. To register, submit a raffle application form (CT-NRP-1). If you do not register by January 1, we recommend you submit Form CT-NRP-1 at least 60 days before the scheduled date for a raffle to ensure adequate time to resolve any issues related to the application.

Raffle registration may be denied if you did not submit or submitted an incomplete raffle report for the raffle activities conducted the prior year.


<https://oag.ca.gov/charities/raffles>

If your group is considering having a Raffle, 50/50, Bingo, or other game of chance, then review the information on website for the Office of the Attorney General. The State of California has specific requirements for holding Raffles & Games of Chance.

[About Nonprofit Raffles](#)
[Registration & Reporting Forms and Checklist](#)

- [Nonprofit Raffles Checklist, pdf](#)
- [Form CT-NRP-1 & Instructions, pdf](#) **Nonprofit Raffle Annual Registration**
This form is required from all raffle registration applicants.
- [Form CT-NRP-2 & Instructions, pdf](#) **Nonprofit Raffle Annual Report**
Raffle registrants must report annually using this form.

[Laws & Regulations](#)
[Frequently Asked Questions](#)

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Food Sales

[EGUSD AR 5030 - Student Wellness](#)

Competitive Foods and Beverages*

*i.e., foods sold outside of reimbursable school meals, such as through vending machines, cafeteria a la carte [snack] lines, fundi

The District is committed to ensuring all foods and beverages available to students on the school campus* during the school day designee to approve the sale of foods and beverages outside of the district's food service program, including sales by student o <https://www.cde.ca.gov/ls/nu/he/compfoods.asp>.

*For reference:

School campus refers to any area owned or leased by the school and used at any time for school-related activities, including on

During the school day refers to the time between midnight the night before to 30 minutes after the end of the instructional day

Elementary Schools. The school food service program will approve and provide all food and beverage sales to students in elem federal nutrition standards.

Refer to California Department of Education website for specific standards that apply to foods sold at elementary schools. Ref

Middle and High Schools: All foods and beverages sold individually outside the reimbursable school meal programs (including 1 portion size standards. Reference the Competitive Food Sales Quick Reference Cards for exemptions to listed standards.

To support healthy food choices and improve student health and well-being, all foods and beverages sold outside of the reimbu school campus* during the school day* will meet or exceed the state and federal nutrition standards.

- Competitive Food Sales

EGUSD Food & Nutrition WebPage:

<https://egusdschoolmeals.com/index.php?sid=1594664583893&page=welnesspolicy>



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Purchases & Monetary Donations to Schools

- Donated to specific school, team, club, or grade level
- Must be accepted by administrator and appropriate department (if through the district)
- Collaborate with school administration & leadership team to create wish list for school
 - Will departments need to be involved in approval process?
 - Maintenance & Operations
 - Facilities
 - Purchasing
 - Tech Services
 - Budget
 - Payroll



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Purchases & Monetary Donations to Schools

Through District:

- Monetary donation with contribution letter stating purpose of funds
- Contribution will be recognized by the Board, and organization will receive letter recognizing donation of items or value of amount by the Business Office
- Possible coverage by district insurance if a loss occurs

**Recommended for personnel costs, or costly items that may need to be asset tagged or approved by departments (Facilities, Tech Services, Maintenance & Operations, Transportation, etc..)

Through School - Associated Student Body or Educational Activities:

- Donate Funds or Items to School
- Considered a one-time donation to ASB.
- Recognized by the site principal
- Not covered by district insurance if a loss occurs

**Recommended for services or consumable items (Murals, Field Trips, Art supplies etc...)

HEADLINES

Treasurer Detained After Theft Over \$12,000 from Sanborn Elementary School PTA in Palatine

Sat Mar 23, 2024 10:42 pm Cardinal News CRIME BLOG 6. Police Investigations



Mallika Thastina, PTA treasurer accused of theft from PTA, checking account at Sanborn Elementary School in Palatine (SOURCE: Palatine Police Department).

A.P.T. The Echo

Treasurer arrested, accused of embezzling funds from Galt school's athletics booster club

- ▶ Felony Embezzlement
- ▶ Nearly \$200,000
- ▶ Served As Treasurer
- ▶ Liberty Ranch High School Athletics Booster Club



CARMELA BAKER

ARREST IN BOOSTER CLUB EMBEZZLEMENT



6:51 10:04

Carlsbad woman gets prison for \$4.6M fraud

BY KRISTINA DAVIS
OCT. 13, 2015 7:03 PM PT



SAN DIEGO — A Carlsbad woman was sentenced in San Diego federal court Tuesday to more than three years in prison for a fraud scheme through which she stole some \$4.6 million, authorities said.

Susan Polmar, 47, spent the funds on luxuries, including \$33,000 on trips to Disneyland and more than \$130,000 renovating her home, according to the U.S. Attorney's Office.

Polmar, a small business owner, stole the money by submitting false customer information to a payment processing firm, receiving advanced payments, then creating more fake customer data to cover her tracks, prosecutors said.

Jury awards \$5.7 million to Irvine PTA mom in drug-planting case



California Attorney Faces New Trial in Drug-Planting Case

He's accused of trying to frame a PTA volunteer.

Los Angeles Times

A MYSTERY IN SIX PARTS

FRAMED

SHE WAS THE PTA MOM EVERYONE KNEW. WHO WOULD WANT TO HARM HER?

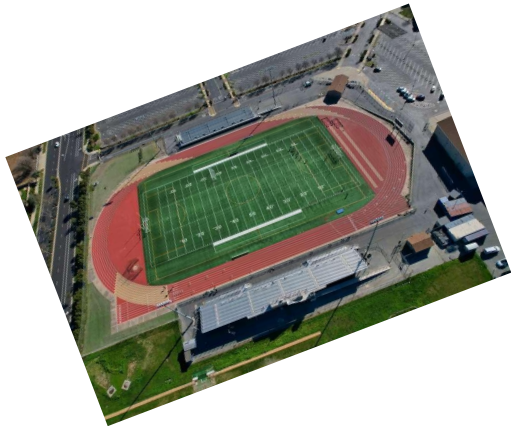
By CHRISTOPHER GOFFARD | Sept. 3, 2015

THE CALL | THE POWER COUPLE | LIMBO | THE PROSECUTOR | THE TRIAL | RUIN



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Facility Use



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Save time when organizing events.

Create a Facilitron account today!

- Tax ID#
- Certificate of Insurance (COI & AEI)
- Contact & Billing Information

www.facilitron.com/egusd95624

- All events need to be placed in Facilitron by your organization.
(not site staff)
- For future reference record your Reservation Number.
- All communications will be through Facilitron.



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Successful Reservations



Submit reservations **at least 30 days** in advance of your events.

Each event needs its own reservation unless it is a reoccurring event such as a PTA monthly meeting.

Changes to reservations such as adding dates, removing dates, or adding and removing rooms, need to be done **2 weeks in advance**.

Equipment requests or modifications need to be made **2 weeks prior to the event**.

All communication goes through the Facilitron comment section. Separate emails may not be sent. Check the comments section frequently.



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Board Policy & Administrative Regulation 1330

< Board Policy Manual



>> Policy 1330: Use Of School Facilities

Status: ADOPTED

Original Adopted Date: 10/01/1984 | Last Revised Date: 07/10/2012 | Last Reviewed Date: 07/10/2012

[see more](#)

Philosophy

The Board of Education recognizes that it is desirable that community use be made of school facilities when such use does not impinge upon the educational program. The district is, therefore, committed to the concept of encouraging the use of its facilities by community groups during those hours in which curricular and extra-curricular school programs are not using them.

While it is the intention of the Board to provide the community the widest possible access to school facilities, practical economics dictate that community use will not take place at the expense of the regular school program.

Those parts of the school buildings or facilities appropriate for public use shall be used by community groups and organizations for those purposes consistent with the law, the school use of facilities, and the proper care and maintenance of district property.

It is the Board's intention that the district comply with the intent, requirements, limitations and restrictions of the Civic Center Act, Education codes 38130-38139. Rules and regulations for such non-school use of facilities shall be developed and communicated to the community. Such rules shall include:

1. Eligible Organizations
2. Use for private profit
3. Application and approval procedures
4. Fee schedules
5. Supervision requirements

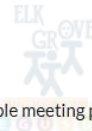
Types of Activities Permitted

1. Public, literary, scientific, recreational, educational, or public agency meetings.
2. Discussions of matters of general or public interest.
3. The conduct of religious services for temporary periods by any church or religious organization which has no suitable meeting place for the conduct of services. The Board must charge the church or religious organization a fee at least equal to the district's direct costs.

[EGUSD Board Policy 1330](#)

[EGUSD Administrative Regulation 1330](#)

Requirements and permissible activities for Facility Use. Requires all renters to be 21 years of age or older.



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Facility Use Fees

Groups will be billed based on the criteria in [EGUSD Board Policy 1330](#) & [EGUSD Administrative Regulation 1330](#).

Fee Exempt User: School-Connected Organizations that have submitted annual Request for Authorization and are recognized by the Board. (pay for custodial and security).

Classification I: Non-Profit organizations- promoting youth and school activities. (Pay for rental of facility, custodial, and security). **SCO who do not submit a Request for Authorization

Classification II: Non-profit organizations - not specifically promoting youth and school activities.

Classification III: Religious Organizations, all for profit organizations.



Partnership with Schools and Student Groups

PTA's, PTSO, Boosters, Alumni Foundations, etc. exist specifically to support students currently enrolled in EGUSD school sites and school programs.

SCO's are considered partners of the district and school site.

Your events are seen as *school-connected activities*, even if they occur outside the school day.

The difference isn't arbitrary. It comes from how the District, insurers, and state guidance classify SCO's in relation to the school system. This distinction affects liability, insurance expectations, and district oversight.



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School-Connected Organization

SCO events serving students, families, and staff increase the District's risk. Therefore, the District requires:

- SCO's own event insurance
- Insurance from all vendors participating in your event
- Adherence to **all** district processes and procedures

The District's insurance provide, *School's Insurance Authority*, mandates compliance with its procedures.



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Insurance Options for Vendors

EGUSD requires **all** vendors participating in an event on district property to provide copies of their liability insurance certificate and an additional insured endorsement.

Required Insurance Limits:

\$2 million per occurrence and \$4 million per aggregate

**The District may allow a lower limit. Final determination of insurance rates will be at the discretion of Risk Management based on multiple factors including, but not limited to; type of activity, number of attendees, and the level of risk involved.



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Insurance Options for Vendors

If a vendor needs insurance they can purchase a one-day/per event policy.

Here are two options:

Event Helper - <http://www.theeventhelper.com/#t7g05j>

HUB - www.eventinsure.com



** EGUSD does not endorse any specific insurance companies or programs.



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Custodial and Safety & Security

All events taking place on District property will require custodial services, and possibly Security.

Required services will be determined by Maintenance & Operations and the Safety and Security divisions.

Staffing levels for these services will be determined by multiple factors, including but not limited to; the type of event, the number of facilities requested, number of attendees and any special amenities being brought to campus.



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FACILITY USE HANDBOOK



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SCO Events Before or After School

Events such as, but not limited to:

- Fall Festivals
- Spring Carnivals
- School Dances,
- Back-to-School Nights with Vendors
- Open House with Vendors and any other events that have outside vendors participating.



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Events with Vendors: Checklist for Success

EVENTS WITH VENDORS CHECKLIST

(School events that take place before or after school hours with vendors need follow this checklist)

COMPLETED PACKETS MUST BE SUBMITTED 30 DAYS PRIOR TO THE EVENT
INCOMPLETE PACKETS WILL BE RETURNED AND NOT PROCESSED.

- Schedule your event on Facilitron www.facilitron.com/equsd95624 and obtain a reservation number.
- Have **EACH** vendor participating in your event complete the Application for Vendor Participation. (Be sure your Facilitron reservation number is on the vendor application.) **ADDENDUM A**
- Collect from each vendor a copy of their **certificate of insurance and the additional insured endorsement.** **ADDENDUM B**
- Food vendors must also provide a copy of their business license, and health permit in addition to their insurance documents. **ADDENDUM C**

INSTRUCTIONS:

- Once you have collected all documents, have each **APPLICATION FOR VENDOR PARTICIPATION** signed by your administrator.
- Email the completed packet to schoolfacilities@equsd.net with the subject "VENDOR APPLICATION PACKET".

Once everything has been reviewed and approved by Risk Management your packet will be saved to your reservation in Facilitron and sent back to you.

If you have any questions, please contact Risk Management at riskmgmt@equsd.net

Events that take place **before** or **after** school hours with **vendors** or **guest participants** need to follow this checklist.

**COMPLETED PACKETS MUST BE
SUBMITTED 30 DAYS PRIOR TO THE
EVENT**

**INCOMPLETE PACKETS WILL BE
RETURNED AND NOT PROCESSED.**

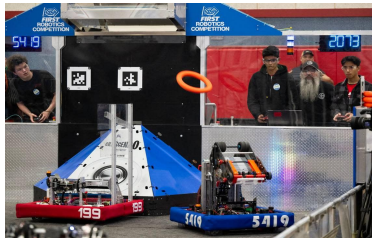
Events with Guest School Districts or Groups

Events that take place on EGUSD campuses that invite other school districts and groups to participate on district property such as, but not limited to;

- Band Competitions
- Color Guard
- Recitals, and
- Robotic Competitions



Each guest school/group **must** provide a copy of their district's or organization's insurance.



Athletics



EGUSD is a paying member of the California Interscholastic Federation (CIF).

All EGUSD sports must follow CIF protocols and procedures. This includes, but is not limited to:

- Pre-season conditioning
- Season practices
- Sport events such as games or tournaments
- Payment to coaches, and
- Gifts to coaches

CIF provides guidance for all of these scenarios

EGUSD High School Teams play other teams within the CIF organization.



**The California Interscholastic Federation is the governing body for high school athletics in California.



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Hold Harmless Agreements: *What you need to know*



You're signing more than just event paperwork.

- Many contracts include “hold harmless” or “indemnity” language.
- These are **legal obligations**, not just formalities.
- Once signed → **you are legally bound immediately. Only accept responsibility for your group's actions - not third party negligence.**

This is not just paperwork. Protect your group from unexpected liability.



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Resources - District

School Site Staff

Activity Director, Athletic Director, Site Controller (secondary schools) or Secretary (elementary schools), and Principal

District Staff (Departments)

Risk Management, Business Services, District Athletic Director, Purchasing, and Fiscal Compliance



Resources



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Students/Families ▾

Employment ▾

District ▲

MORE ⋮

ABOUT EGUSD

- > ADA Notice/Disability Resources
- > Board of Education
- > Departments
- > EGUSD Forms
- > Our District
- > Our Schools
- > Policies/Procedures/Notices
- > Safety Information
- > Strategic Goals

ACADEMICS

- > Assessments
- > College and Career
- > Course Catalogs
- > Curriculum
- > Independent Study
- > Student Programs

FUNDING/BUDGET

- > District Operating Budget
- > ESSER Fund
- > Expanded Learning Opportunities
- > LCFF-LCAP
- > Learning Continuity and Attendance Plan

COMMUNITY

- > Committees/Councils
- > Community Input/Surveys
- > District Flyer Approval
- > EGUSD FIRST Foundation
- > Facilities Use
- > LCAP
- > Online Payments/Donations
- > Scholarships/EGRSF
- > School-Connected Organizations



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District Contacts

Sherrey Giberson, *Risk Management Tech Lead, Risk Management*

Insurance questions

(916) 686-7775 ext. 67019

sgiberso@egusd.net

Amy Scoville, *Admin Assistant, Risk Management*

Custodial , Security, General questions about how to use Facilitron and reservations

(916) 686-7775 ext. 67018

ascovill@egusd.net

Sarah Magaña, *Fiscal Compliance Specialist, Finance & School Support*

Fundraising Allowability, Raffles & Games of Chance, Donations

smagana@egusd.net

Accounting Department

Facility Use - Billing and Payments, Fees and Changes to Reservations

schoolfacilities@egusd.net



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Outside Resources

- Tax Identification Number: Form SS-4, “Application for Employer Identification Number”
 - <https://www.irs.gov/forms-pubs/about-form-ss-4>
- Non-Profit Status:
 - Publication 557, “Tax-Exempt Status for Your Organization”
 - <http://www.irs.gov/pub/irs-pdf/p557.pdf>
 - Package 1023, “Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code” Includes fill-in form 1023, instructions for form 1023, and form 872-C:
 - <https://www.irs.gov/forms-pubs/about-form-1023>
 - Form 8718, “User Fee For Exempt Organization”
 - <https://www.irs.gov/forms-pubs/about-form-8718>
 - California Forms and Instructions Form 3500 Booklet, “*Exemption Application Booklet*” includes instructions and two copies of form 3500.
 - <https://www.ftb.ca.gov/forms/misc/3500-booklet.html>
 - Consult Tax Tips Pamphlet No. 18, “Sales and Use Tax Guide for Volunteer and Nonprofit Fundraising Organizations” to determine what may and may not be taxable.
 - <https://www.cdtfa.ca.gov/industry/nonprofit-organizations/>
- Fiscal Crisis & Management Assistance Team (FCMAT) - Ch. 21 Booster Clubs, Foundations, Auxiliary Organizations and other Parent-Teacher Associations.
 - <https://www.fcmat.org/publicationsreports/k-12-asb-manual-2024.pdf>



New Law: SB 848 (effective 7/1/2026)

Volunteers = Mandated Reporters

- **Sexual abuse prevention now includes every access point to students.** Employees, volunteers, contractors, facility users and program partners all need to be considered in the district's prevention framework.
- **SB 848 readiness is not just a policy - it is a requirement.** Districts will need to align hiring, supervision, volunteer vetting, contractor agreements, facility-use practices and anonymous reporting with their child protection expectations.

