



Annual Organization Approval Form School-Connected Organizations

Board Policy 1230 requires that all groups desiring to be recognized as school-connected organizations request authorization from the Superintendent. The following questionnaire addresses each of the required components of the Board Policy.

This approval is for the current fiscal (school) year (July 1 through June 30), is due and renewable each year, and must be submitted to the Principal and then the Sr. Director of TK-12 Principals by October 31. This form should be submitted with the organization's proposed bylaws and any certificates of insurance, if required.

Name of Organization:	
Date of Application:	

Initial Application: _____ **Renewal Application:** _____

- 1.) Names, addresses, email addresses and phone numbers of all officers of the organization.
 District employees shall only handle any of the financial activities of this organization after receiving the appropriate training.

Role in Organization	Name	Role on School Site (i.e. Parent, Staff, Site Admin, Community Member)
President (Required)		
Vice President		
Treasurer (Required)		
Secretary		

Other:		
Other:		

2.) A brief description of the organization's purpose and objectives.

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3.) If renewing, provide the following financial information for the past fiscal year (July 1 through June 30) (note: PTA/PTSA organizations can provide their most recent Form 990):

(A) Total Receipts for the year (July 1 – June 30)	
(B) Total Expenditures for the year (July 1 – June 30)	

4.) Financial Institution or Fiscal Sponsor:

Pasadena Educational Foundation (PEF): _____ or Bank: _____

If Bank was selected, The name and address of the bank where the organization's account is located.

Name Of Bank:	
Address of Bank:	

The names authorized to sign or request checks, withdraw or request withdrawal of funds, etc.

5.) Provide a plan for the funds if the organization ceases to exist. If a previous agreement exists (ie. with a fiscal sponsor), please include that here or leave blank if funds will be distributed by PEF.

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Submitted By:	
Signature:	
Title:	
Date:	

By signing, the organization agrees to and understands that the District may audit the group's financial records at any time, either by District personnel or a certified public accountant. PTA/PTSA organizations would use their own [elected or appointed financial reviewers](#).

The organization also agrees to provide evidence of liability and/or directors and officers insurance when and in the manner required by law.

A copy of the completed form must be provided to the organization/club and one copy sent to the Department of TK-12 Schools, and the Athletics Department if appropriate..

School Principal Use Only:

I certify that the following documents have been submitted and are on file in my office, subject to District/Board approval:

- Bylaws
- Year-end Financial Report from Prior Year (only applicable if group was in existence during prior year) or, for PTA/PTSA organizations, Form 990.

Site Principal:	
Signature:	
Title:	
Date:	

TK-12 Schools Approval: _____
(Initials)