

Checklist of SCO Items

**Note - items must be submitted with the approval form to the Business Services office by September 30, 2023*

- *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, 2022
 - Total receipts for last year (July 1, 2021- June 30, 2022)
 - Total expenditures for last year (July 1, 2021- June 30, 2022)
 - Ending bank balance as of June 30, 2022
 - (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.