



MEMO

To: School-Connected Organizations Lodi Unified School District BP 1230

From: Leonard Kahn, Chief Business Officer

Subject: School-Connected Organizations

Thank you for applying to operate a school-connected organization supporting Lodi Unified School District schools and for making a difference in the lives and education of our students.

We are providing you this memo to help you with your application. All school-connected organizations are considered separate organizations from Lodi Unified School District as stated in Board Policy and Rule 1230. Before operating on any school site, the district requires the following items from each school-connected organization:

Required Document	Comment
School-Connected Organization name	Define which school and sport or activity the group is supporting.
School-Connected Organization officers and contact information	List officers' titles, phone numbers, and email addresses.
Employer/Tax Identification Number (TIN) of the school-connected organization Note: The district's TIN is not available for use; the school-connected organization must have its own TIN.	This is required to open a bank account and for many other functions. If you used an individual's social security number, please indicate this. See Form SS-4 at www.irs.gov
Proof of tax-exempt status under Internal Revenue Code Section 501(c)(3) (if applicable) To apply for exempt status, you may review Form 1023 and the instructions for filing at www.irs.gov	You will need this if your organization will normally have gross receipts of \$5,000 or more in a year OR if you wish to receive a determination letter that recognizes 501(c)(3) status and specifies that contributions to the organization are tax-deductible.
Meeting dates – calendar	For board meetings, committee meetings, etc.
A copy of the school-connected organization current charter and bylaws	Provide the most recent information.

Note: These required documents are subject to change at any time without notice.

An application must be submitted annually including the required documentation.

If you have any questions regarding this memorandum, please contact your principal/school administrator.

Sincerely

Leonard Kahn, Chief Business Officer