



**LOS ANGELES UNIFIED SCHOOL DISTRICT  
POLICY BULLETIN**

**TITLE:** **POLICIES GOVERNING SCHOOL FUND-RAISING  
ACTIVITIES OF PTAs, PTOs, AND BOOSTER  
CLUBS**

**NUMBER:** BUL-1633.2

**ISSUER:** V. Luis Buendia, Controller  
Accounting and Disbursements Division

**DATE:** February 20, 2018

<p><b>ROUTING</b> Local District Superintendent Local District Operations Admin School Principals Financial Managers School Admin Assistants</p>
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**POLICY:** Fundraising activities by Parent Teacher Associations (PTAs), Parent Teacher Organizations (PTOs), and Booster Clubs must adhere to District policies and guidelines. The school site administration should also provide a copy of this Bulletin to these organizations for awareness and reference.

California Education Code Section 51521 prohibits any person to 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 the prior written approval of either the governing board of the school district having the jurisdiction over the school or student body represented to be benefited by such solicitation, or the designee of either of such boards.

Under Board Rule 2505, the Los Angeles Unified School District Board of Education designates the Student Body Finance Section to implement rules and policies for the proper conduct, supervision, and management of the student body financial activities.

**MAJOR CHANGES:** This bulletin updates BUL-1633.1, with the same title, dated March 8, 2017. It clarifies guidelines and provides updates which include:

- Required registration of fundraisers with the California State Attorney General’s Office.
- Prohibition on PTAs, PTOs, and Booster Clubs from using a school’s address as their own.
- Mention of the 15 days required to process Leasing and/or Risk Management approvals for on-campus fundraisers.
- Sales tax for elementary school fundraisers must be reported by the vendor involved.



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- Release of personally identifiable information to Booster Clubs requires parental consent.
- Timelines for use of District facilities.
- Changed insurance requirements for PTAs, PTOs, Booster Clubs, and third party vendors.

**GUIDELINES:** The following guidelines apply:

### I. LEGAL STATUS OF PTA, PTO, AND BOOSTER CLUBS

PTAs, PTOs, and Booster Clubs are all organizations that are separate legal entities from the District. PTAs and PTOs are groups which can have cooperative activities with the Associated Student Body (ASB). Booster Clubs must raise funds independent of the student body.

The District expects that separate legal entities are aware of and comply with all the laws that govern their entities prior to engaging in activities. PTAs, PTOs, and Booster Clubs should refer to California Government Code Section 12580-12599.8 as well as the State of California Department of Justice State Attorney General's website on charities for additional information.

Prior to sponsoring a fundraiser, the school principal should ensure that these separate entities provide the school with copies of appropriate documentation showing independent legal status such as:

- Nonprofit or 501 (c)(3) status
- Tax identification number
- Proof of insurance which meets the insurance requirements as set forth by the Division of Risk Management and Insurance Services (see section IX for additional information)
- Registration status with the State of California is "current" or "registered."

Please note that the District cannot approve any activities unless the organization's Registration Status is "current" or "registered." The California State Attorney General's Office has a charitable registry database which will provide this information to verify status. The following link to this database is provided - <https://oag.ca.gov/charities>; then select Registry Verification Search.



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### II. COORDINATION OF FUNDRAISING ACTIVITIES

It is recommended that a master schedule of fundraising activities be developed by school site staff and provided to the principal at start of each school year. The type, frequency and scheduling of fundraisers must be approved by the principal.

This master schedule should include fundraising by the general ASB, by club/classes, by the PTA/PTO, and Booster Clubs. Proposed fundraising activities by the general ASB and its club and classes must take precedent over fundraising by other organizations.

As always contributions and participation by students, employees, and parents in any fundraising activity must be entirely voluntary.

School websites may include links to a PTA/PTO or Booster Club website and on-line school calendars can list events by these organizations.

The form Calendar of Fundraising Activities (Attachment C) may be used to list activities and submit to the principal. Please refer to Publications 464 and 465 for additional information regarding fundraising activities.

### III. INVOLVEMENT ON CAMPUSES AND WITH STUDENTS

#### A. Student and Staff Involvement

Schools can have one parent group, which can be either a PTA or a PTO but not both. However, if a campus has a magnet center, and if the principal approves, the magnet center can also have a parent group. Schools can have more than one Booster Club if approved by the principal.

In order to avoid perceptions of, or an actual, conflict of interest, District employees should not be voting members of any of these entities' governing Boards.

PTAs and PTOs can conduct "cooperative activities" with the school's students and ASB. A cooperative activity is one in which the ASB participates voluntarily with either the PTA or PTO in an activity through planning, conducting, and/or the sharing of proceeds. It is a school site decision to determine whether an event will be cooperative or solely sponsored.



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Booster Clubs or any other separate legal entity, other than PTAs/PTOs, cannot conduct cooperative activities with students. *Student body organizations, (including clubs and graduating classes)* may not participate in fundraising activities with Booster Clubs.

ASB's can agree to a Booster Club (or a PTA/PTO/ or vendor) having a concession booth/stand at a student body activity (i.e., a football game) for a portion of the sales proceeds, but such agreements must be negotiated prior to the event occurring and documented in writing in the ASB minutes. Agreements must only be for one school year, as each year's ASB must review and approve concession agreements.

### B. Communications

The school cannot send Booster Club flyers home with students to promote a Booster Club activity, nor can a school mail Booster Club flyers to the student's home. As a courtesy, and subject to the approval of the principal, Booster Clubs may leave flyers at the school site (typically in the main office) which can then be picked up on an individual basis. Individual students can volunteer to assist with a Booster Club activity as long as it is outside of the school day.

Communications from PTAs/PTOs and Booster Clubs should be clearly labeled as such, with separate letterhead, address and/or website. PTAs, PTOs, and Booster Clubs must not use the school's address as the address of their organization.

## IV. APPROVAL PROCESS FOR FUNDRAISING ACTIVITIES

As referenced earlier, per Education Code Section 51521, prior written approval must be obtained before any fundraising activities by PTAs, PTOs, and Booster Clubs can take place.

To properly conduct fundraising activities, it is important to plan in advance to meet all District requirements such as the following:

- At least three weeks prior to any fundraising activity or event to occur, a completed Booster Club Fundraising Permission Request - Form 34-EHJ-8 or 34-EHJ-8-Booster (Attachment A) must be submitted and approved by the Student Body Finance Section
- If the fundraising activity or event is on-campus, an additional application and approval is required from the Division of District Operations – Non Academic Facilities Planning/Leasing & Asset Management prior to such



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use. Please review BUL-6894.1 Procedures for Third Party Use of School Facilities issued on August 18, 2017 and complete Request For Facilities Use Form (Attachment G).

- Request for Authorization – Elementary Schools, Continuation, Special Education Schools, PTA/PTO Elementary (Attachment B) must be completed and submitted to your Coordinating Financial Manager assigned to your school at least 3 weeks prior to the event for approval. Requests for Authorization submitted after the fact will not be approved.

Other forms to request for authorization may be obtained from your Coordinating Financial Manager or submitted such as:

- Request for Approval of District Sponsored Special Event (Attachment D)
- Division of Risk Management and Insurance Services Waiver Form (Attachment E)
- At secondary schools, the ASB leadership must also approve a fundraiser that is a cooperative activity with the PTA/PTO or one that is sponsored only by the PTA/PTO so that proposed activities do not interfere with or impact activities sponsored by the ASB.
- A Request for Authorization should clearly state the purpose of the fundraiser and how the proceeds will be used. All fundraisers must indicate the percentage split of the proceeds of the fundraiser between the ASB and the PTA/PTO if it is a cooperative activity. Since a cooperative activity is one in which the students participate voluntarily with either the PTA or PTO in an activity through planning, conducting, and/or the sharing of proceeds, it is not appropriate for a PTA/PTO to keep 100% of the proceeds from a cooperative activity.
- For Booster Clubs, the Request for Authorization must be approved by the principal and the Student Body Finance Section but not the ASB leadership, unless it is occurring during an ASB event.
- Fundraisers **cannot occur during instructional time**. This also applies to those fundraisers that claim to have an instructional component or where pledges for the activity are obtained outside of the instructional time. E.g., It is impermissible for pledges for laps to be obtained outside of the instructional day and have the laps run during Physical Education (P.E.) or other instructional periods. Further, fundraising activities may not be linked to course credit or grades.
  - PTA/PTO fundraising activities, such as book fairs, can take place on school grounds during the day, but not during instructional time. However, sales of food/beverage items that are not on the approved list issued by Food Services Division can only occur 30 minutes after the end of the school day. Approved items can be sold during non-instructional



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- time as part of the “four times per year” sales referenced in Publication 465 and 464.
- Booster Club fund-raising activities, including the actual sale of items, shall not take place on school grounds during the school day. Sales of food items can only occur 30 minutes after the end of the school day. In addition, funds for a Booster Club activity should not be collected/turned in to teachers or others during the school day by individual students who are volunteering with a Booster Club activity.

The updated information on new federal and state regulations pertaining to the selling and/or serving of food and beverages is outlined in BUL-6292.1 Guidelines for Sales and Service of Non-School Meal Program Food/Beverages on School Campus issued on August 24, 2015.

### V. ACCOUNTING FOR PROCEEDS

Education Code Section 48937 states that, “The governing board of any school district shall provide for the supervision of all funds raised by any student body or student organization using the name of the school.” It is important that District policies related to the accounting of fundraising and income generating activities occurring on District campuses, in addition to Publications 464 and 465 are followed.

- Funds raised through a cooperative activity with a PTA/PTO must initially be carried on the student body books.
- Guidelines that list the expenditures permitted and prohibited must be strictly followed. Please refer to BUL-4624.0 Elementary Student Body Organizations – Permitted and Prohibited Expenditures; BUL-4591.0 Secondary Student Body Organizations – Permitted and Prohibited Expenditures; and Publications 464 and 465, for additional information. To determine whether an expenditure not indicated on the expenditure list would be an appropriate use of student body funds, contact your Coordinating Financial Manager.
- After all the expenses are paid, and the profits of the fundraiser determined, a student body check must be sent to the PTA/PTO for its share of the profit. PTA/PTO share of proceeds from a cooperative activity, or those of a solely sponsored activity, must not be kept on the ASB books. It should be noted that elementary schools do not have reseller permits, so any sales taxes would be reported by the vendor not the elementary ASB.

As noted in Section III. A, since a cooperative activity is one in which the students participate voluntarily with either the PTA or PTO in an activity through planning, conducting, and/or the sharing of proceeds, it is not



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appropriate for a PTA/PTO to keep 100% of the proceeds from a cooperative activity.

- The District recommends that as a best practice, PTOs/PTAs/Booster Clubs should limit their deposits in bank accounts to the FDIC insured amount.
- Fundraising financial statements must be completed and turned in to the Student Body Finance Section within 30 days after the event for either a cooperative activity or an activity solely sponsored by a PTA/PTO.
- In addition, as a best practice, PTOs/PTAs/Booster Clubs should adhere to annual audit requirements as indicated in the “Guide for Charities” issued by the California Attorney General’s Office.
- Student Body Financial Reports are required from all schools. Please refer to REF-1967.11 2017-2018 Calendar of Student Body Financial Reports for All Schools issued on September 18, 2017.

### VI. REQUESTS FOR DONATIONS

The principal must review and approve any letter that is sent to parents requesting donations to ensure that it is appropriate and cannot be misconstrued as being required or as an unauthorized charging of pupil fees for educational activities. The Educational Equity Compliance Office and the Education Legal Services team in the Office of the General Counsel can assist principals in this review.

Schools receiving donations from a PTA/PTO/Booster club must complete “Request to Process Donation” Form, Attachment A of Bulletin 5895.1, “Donations”, issued on February 10, 2016. ASB’s receiving donations from a PTA/PTO/Booster club must complete “Request for Authorization” Form 34-EHJ-8-Unorg (Attachment B).

### VII. STUDENT DATA PRIVACY REQUIREMENTS

Schools may give personally identifiable information (PII)/Directory Information to PTA’s and PTO’s unless the parent has opted out. Schools can verify whether a parent has opted out by:

- a.) logging into MiSiS with “Office Manager” role
- b.) searching for the student and clicking on the student’s name
- c.) selecting “Exclusions” from the Census menu.

**Please note that a PTA/PTO shall not release the student PII to a vendor, Booster Club, or other third party without written parental consent.**



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### VIII. USE OF DISTRICT FACILITIES

PTAs/PTOs solely sponsoring an event/activity, and Booster Clubs holding a fundraising activity on District property must obtain a license agreement from the Leasing Department prior to the event. License agreements or permits will not be issued without a Request for Authorization approved by the Student Body

Finance Section, so it is important to allow enough time to secure the necessary approvals prior to the event or activity. Please refer to Section IV for timeline information.

When Student Body Finance approves a Request for Authorization for an event/activity solely sponsored by the PTA/PTO or an event/activity for a Booster Club, the Request will be forwarded to Leasing and Space Utilization. The Leasing Department will then contact the applicant to set up a license agreement and include the approved Request for Authorization in the license agreement package.

A permit is not required for regular meetings of PTAs and PTOs. All arrangements for such meetings should be made with the principal of the school at which the meeting will take place.

### IX. LIABILITY INSURANCE FOR PTAS, PTOS, AND BOOSTER CLUBS

PTAs, PTOs, and Booster Clubs are all organizations that are separate legal entities from the school district. Therefore, these organizations are required to provide proof of insurance which meets the insurance requirements as set forth by the Division of Risk Management and Insurance Services. The guidelines and limits for insurance are subject to change at the discretion of the Division of Risk Management and Insurance Services based on risk, exposure and liability; specialized insurance coverage may be required depending on the type of event. Insurance requirements may be obtained from the Division of Risk Management and Insurance Services. Please see Attachment D for Standard Insurance Requirements.

**The Certificate Holder portion of the insurance certificate must be listed as follows:**

Los Angeles Unified School District & the Board of Education of the  
City of Los Angeles  
333 South Beaudry Ave, 28<sup>th</sup> Floor  
Los Angeles, CA 90017

#### **Additional Insured Endorsement**

The Commercial General Liability policy **and** the Commercial (Business) Automobile policy **must** contain an additional insured endorsement in favor of:



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### **Los Angeles Unified School District and the Board of Education of the City of Los Angeles**

Division of Risk Management and Insurance Services suggests contacting a commercial insurance agent for insurance information.

The Division of Risk Management and Insurance Services offers a “Special Events Liability Insurance Program” through the broker Alliant Insurance Services for those organizations that opt to purchase insurance. The coverage is reasonably priced and competitive for special events. However if youth are involved in any capacity this insurance is not available.

You may obtain an application by accessing [www.lausd.net](http://www.lausd.net), and following these steps:

- Click on Office, find Division of Risk Management and Insurance Services.

For information regarding Special Event Liability Insurance, click the tab for Risk Finance and then click on Special Events.

- For the application, click on Risk Finance and choose the tab for Special Events, then click on Insurance Application for Special Event Liability Coverage. Please allow 30 days for processing of your application.

All Third Party vendors hired for an event/activity are required to provide a certificate of insurance which meets the District’s insurance requirements. Independent contractors (eg: DJ, piano player) who do not carry insurance can sign the Waiver of Liability, Assumption of Risk, and Indemnity Agreement (Attachment E).

Food vendors will be required to provide a certificate of insurance, public health permit, business license, & food handler’s certificate.

PTA/PTO & Booster events held off campus do not require Risk Management review/approval.

Food vendors will be required to provide a certificate of insurance, public health permit, business license, & food handler’s certificate.

PTA/PTO & Booster events held off campus do not require Risk Management review/approval.

For questions, please call the Division of Risk Management and Insurance Services at (213) 241-0329. For information regarding leasing District property, please contact Leasing and Space Utilization at (213) 241-6785.



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### **RELATED RESOURCES:**

- Publications 464 Student Body Policies and Accounting Procedures-Elementary Schools
- Publication 465 Student Body Policies and Accounting Procedures-Secondary Schools
- Board Rule 2505
- Bulletin 6894.1, "Procedures for Third Party Use of School Facilities"
- Activity Checklist for Carnivals and Other Events; Issued by the Office of Environmental Health and Safety
- BUL-5353.0 Mechanical Rides on School District Property
- BUL-6292.1 Guidelines for Sales and Service of Non-School Meal Program Food/Beverages on School Campus
- BUL-4624.0 Elementary Student Body Organizations – Permitted and Prohibited Expenditures
- BUL-4591.0 Secondary Student Body Organizations – Permitted and Prohibited Expenditures
- BUL-3732.0 Procedures for Collections of Funds at Secondary Schools
- REF-1967.11 2017-2018 Calendar of Student Body Financial Reports for All Schools\
- BUL-5895.1 Donations

### **ATTACHMENTS:**

- Attachment A – Booster Club Fundraising Permission Request Form
- Attachment B – Request for Authorization – Elementary Schools, Continuations, Special Ed. Schools, PTA/PTO Elem.
- Attachment C – Calendar of Fundraising Activities
- Attachment D – Request for Approval of District Sponsored Special Event
- Attachment E – Division of Risk Management and Insurance Services Waiver Form
- Attachment F – Activity Checklist for Carnivals and Other Events
- Attachment G – Request for Facilities Use



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**ASSISTANCE:** For assistance or further information, please contact your Coordinating Financial Manager.

<b>LD</b>	<b>PHONE</b>
NORTHWEST	(818) 654-3709
NORTHEAST	(818) 252-5479
SOUTH	(310) 354-3496
CENTRAL	(213) 241-1918
EAST	(323) 224-3319
WEST	(310) 914-2116
Adult Schools & ASTF	(213) 241-2163

For assistance with insurance requirements, please contact the Division of Risk Management and Insurance Services at (213) 241-0329.

For more information about the attached Activity Checklist, please contact the Office of Environmental Health and Safety at (213) 241-3199.

For more information about use of facilities, please contact Leasing and Space Utilization at (213) 241-6785.

For more information about Civic Center Act permits, please contact the Civic Center Permits Office at (213) 241-6900.

For more information regarding unauthorized charging of pupil fees, contact the Education Legal Services team in the Office of the General Counsel or the Educational Equity Compliance Office at (213) 241-7600.

Los Angeles Unified School District  
Booster Club Fundraising Permission Request  
(Form 34-EHJ-8-Booster)

Booster Club Name: \_\_\_\_\_ School: \_\_\_\_\_

Permission is requested to conduct the following activity for the following purpose (include description of activity and/or items to be sold):\*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*\*Booster Club activities at ASB events (such as Athletic concession stands) must also be approved by the ASB. ASB must agree to the percentage of proceeds between ASB and the Booster Club. (please refer to page 2 in the Bulletin)*

Begin Date: \_\_\_\_\_ End Date: \_\_\_\_\_

On Campus:  Yes  No

Specific Location such as quad, auditorium, athletic field, restaurant (provide whether "on campus" or "off"):

\_\_\_\_\_

Time of day: \_\_\_\_\_

If "On-Campus", is any third party vendor/business involved?  Yes  No

If yes, please provide name of vendor/business and description of services provided:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Booster Club Representative Name

\_\_\_\_\_  
Booster Club Representative Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Principal (or Designee) Name

\_\_\_\_\_  
Principal (or Designee) Signature

\_\_\_\_\_  
Date

**If Athletic Booster fundraiser, coach and Athletic Director must also approve.**

\_\_\_\_\_  
Coach Name

\_\_\_\_\_  
Coach Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Campus Athletic Director Name

\_\_\_\_\_  
Campus Athletic Director Signature

\_\_\_\_\_  
Date

**After completion, please submit to Student Body Finance Section (via email or mail) three weeks prior to event.**

Student Body Finance Section:  Approved

Not Approved

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**If "On Campus", Student Body Finance will forward to Leasing and Space Utilization for license agreement.**

Request for Authorization - Elementary Schools, Continuation, Special Ed. Schools, PTA/PTO Elem

School: <a href="#">Click here to enter text.</a>		PTA/PTO Legal (Registered) Name: <a href="#">Click here to enter text.</a>	
Local District: <a href="#">Click here to enter text.</a>		Date: <a href="#">Click here to enter a date.</a>	PTA/PTO Telephone: <a href="#">Click here to enter text.</a>
Please check type of request (1 through 5):			
1.	<input type="checkbox"/>	<b>Request to hold a fundraising activity</b>	
<b>Sponsor:</b>		ASB (student body)* <input type="checkbox"/>	PTA/PTO** <input type="checkbox"/> Cooperative (ASB & PTA/PTO)*** <input type="checkbox"/>
* 100% of proceeds must go to ASB		**100% of proceeds can go to PTA/PTO	
***Proceeds must be split between ASB and PTA/PTO (% determined by principal prior to event)			
<b>Distribution of Proceeds:</b>		ASB Share <a href="#">Click here to enter text.</a> %	PTA/PTO Share <a href="#">Click here to enter text.</a> %
<b>Purpose of Fundraiser:</b>		<a href="#">Click here to enter text.</a>	
<b>Description of Fundraiser:</b>		<a href="#">Click here to enter text.</a>	
<b>Details of Fundraising Activity:</b>			
Begin Date: <a href="#">Click here to enter a date.</a>		End Date: <a href="#">Click here to enter a date.</a>	On Campus: Yes <input type="checkbox"/> No <input type="checkbox"/>
(Fundraising activities should not exceed 3 consecutive weeks)		Specific Location: <a href="#">Click here to enter text.</a>	
Time of Day: <a href="#">Click here to enter text.</a>		(Fundraising activities cannot occur during instructional time)	
If "On-Campus", is any third party vendor/business involved? Yes <input type="checkbox"/> No <input type="checkbox"/>			
If yes, please provide name of vendor/business and description of services provided: <a href="#">Click here to enter text.</a>			
Sources of Revenue: (i.e catalog name, games, concessions, entertainment, items sold) <a href="#">Click here to enter text.</a>			
Notes: Elementary schools do not have Retail Sales Permits. Vendor must pay sales tax for fundraisers with taxable items. If tickets are used, please complete form 63.E.61 Perpetual Inventory of Tickets & either a House Council Form (63.E.65) or Cash Admission Report Form (63.E.63)			
2.	<input type="checkbox"/>	<b>Request for Expenditure</b>	
Vendor/Contractor*: <a href="#">Click here to enter text.</a>		Amount: \$ <a href="#">Click here to enter text.</a>	
Description: <a href="#">Click here to enter text.</a>			
*If services are provided, a W9 must be completed and submitted with Request for Authorization. Risk Mgt approval may also be required for insurance purposes.			
3.	<input type="checkbox"/>	<b>Receive a Cash or Non-monetary Donation</b>	
Donor/Vendor: <a href="#">Click here to enter text.</a>		Amount: \$ <a href="#">Click here to enter text.</a>	
Item: <a href="#">Click here to enter text.</a>	Make: <a href="#">Click here to enter text.</a>	Model: <a href="#">Click here to enter text.</a>	Serial #: <a href="#">Click here to enter text.</a>
Purpose: <a href="#">Click here to enter text.</a>			
4.	<input type="checkbox"/>	<b>Transfer or Dispose of Student Body Owned Equipment</b>	
Recipient: <a href="#">Click here to enter text.</a>			Value: \$ <a href="#">Click here to enter text.</a>
Equipment Description: <a href="#">Click here to enter text.</a>			
Note: If approved, equipment should be removed from ASB Inventory list.			
5.	<input type="checkbox"/>	<b>Other</b>	
Description: <a href="#">Click here to enter text.</a>			
<p>Signature of Principal _____ Date _____ 10<sup>th</sup>/31<sup>st</sup> PTA _____ Date _____</p> <p>Signature of President, _____ Date: _____</p> <p>Local PTA/PTO: _____</p> <p>After completion, please submit to your Coordinating Financial Manager (via email or mail) 3 weeks prior to event.</p> <p><b>SBFS Approval – ASB Event/Activity:</b> <input type="checkbox"/> Approved Not Approved <input type="checkbox"/> Comments: <a href="#">Click here to enter text.</a></p> <p><b>PTA/PTO Registration Status Current/Registered with State DOJ?:</b> <input type="checkbox"/> Yes No <input type="checkbox"/> Date Checked: _____</p> <p><b>SBFS Approval – PTA/PTO Event/Activity:</b> <input type="checkbox"/> Approved as to Process Not Approved <input type="checkbox"/> Comments: _____</p> <p>Coordinating Financial Manager Signature: _____ Date: _____</p> <p>If "On-Campus" and solely sponsored by PTA/PTO, SBFS will forward to Leasing and Space Utilization for license agreement. If PTA involved, school or local PTA forwards to 10th or 31st PTA who will sign and then return back to SBFS. For ASB or cooperative, if "On-Campus" &amp; Third Party Vendor/Business is involved, SBFS will forward to Risk Mgt for approval. For ASB, if Off-Campus, SBFS will forward to Risk Mgt. for approval.</p>			





# Risk Management & Insurance Services



## REQUEST FOR APPROVAL OF DISTRICT SPONSORED SPECIAL EVENT

All Non-District sponsored Events please contact Leasing – (213) 241-6785

**NON-LAUSD entities are required to provide proof of insurance prior to participating in a Special Event.**

Date: \_\_\_\_\_ Type of Special Event:  On-Campus  Off-Campus

School Name: \_\_\_\_\_ Co-Located/Prop 39 Charter School  Yes  No

LAUSD Contact Person: \_\_\_\_\_ E-mail: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

Event Description: \_\_\_\_\_

Please check:  Health Fair  Athletic Event  Vendors  Inflatables/Jumpers

Food/Concessions  Animals  Other: \_\_\_\_\_

Date(s) of Event: \_\_\_\_\_ Event Time: \_\_\_\_\_

Off-Campus Event Facility Name & Address: \_\_\_\_\_

Have you entered into any agreement, contract or permit?  Yes  No - If yes, **Please forward a copy of the document with this request**

Does the off campus facility require Proof of Insurance from LAUSD?  No  Yes  
(If yes, attach request form <http://certificatesofinsurance.lausd.net/>)

Anticipated Total Event Attendance per Day: {Participants, Spectators, Staff and Guests}: \_\_\_\_\_

Date informed Local District \_\_\_\_\_ Name of Person Notified: \_\_\_\_\_

Method of Contact: Phone  Fax  Person  Email

➤ **PRINCIPAL SIGNATURE:** \_\_\_\_\_ **Date:** \_\_\_\_\_

➤ **CO-LOCATED/PROP 39 CHARTER SCHOOL SIGNATURE** \_\_\_\_\_ **Date:** \_\_\_\_\_

- ✓ Please forward completed request to Risk Management & Insurance Services @ [riskfinance@lausd.net](mailto:riskfinance@lausd.net)
  - See Checklist on reverse page

**Allow 30 days to process the request. If we have additional questions, we will contact you**

➤ **RISK MANAGEMENT APPROVAL:** \_\_\_\_\_ **Date:** \_\_\_\_\_

# Request for Approval of School Sponsored Special Event

The information requested must be forwarded in order to continue with consideration of approval of this event. The District, its board Members, Officers and individual Principals may be at risk for an adverse finding of liability in the event of an injury or accident during a sponsored event.

Please provide our office with the information stated below regarding your school sponsored special event:

- Itinerary – detailed statement of ALL planned activities and participants
- Identify Event organizer and provide a list of Vendors, Food Concessionaires
- Provide a detailed supervision plan
- Certificate of Insurance - Standard insurance requirements (below): The actual insurance requirements will be determined by the nature and scope of your activity and is subject to change; please refer to LAUSD Insurance Guidelines.

<b>COMMERCIAL GENERAL LIABILITY</b>	
Each Occurrence Limit	\$1,000,000
Fire Damage (Any One Fire)	\$50,000
Medical Payments (Any One Person)	\$5,000
Personal & Advertising Injury	\$1,000,000
General Aggregate	\$2,000,000
Products/Completed Operations aggregate	\$2,000,000

❖ **Business Auto Liability Insurance** for owned, scheduled, non-owned or hired automobiles with a combined single limit of no less than \$1,000,000 per occurrence. If no company or organization autos will be used, then an **Auto Liability Statement** must be completed.

❖ **Workers’ Compensation and Employers Liability Insurance** in an amount covering full liability under the California Workers’ Compensation Insurance and Safety Act and in accordance with applicable state and federal laws. Part A – Statutory Limits, Part B - \$1,000,000/\$1,000,000/\$1,000,000 Employer Liability

**Sole proprietors or organizations with no employees** are exempt from providing Workers’ Compensation and Employers Liability Insurance, but must provide a signed **Workers’ Compensation Statement**.

❖ **Abuse and Sexual Molestation coverage** (applicable when youth are involved in any capacity)  
\$1,000,000 per occurrence/\$1,000,000 aggregate

\*\* FOOD TRUCK VENDORS MUST PROVIDE: Certificate of Insurance, ServSafe, Health Permit & a copy of their Business License

*All Certificates of Liability Insurance must list LAUSD as the certificate holder and as an additional insured, SEE BELOW.*

**The Certificate Holder portion of the insurance certificate must be listed as follows:**

Los Angeles Unified School District & the Board of Education of the City of Los Angeles  
333 South Beaudry Ave, 28th Floor  
Los Angeles, CA 90017

**AND**

**Additional Insured Endorsement must be noted as follows:**

The Commercial General Liability policy and the Commercial (Business) Automobile policy **must** contain an additional insured endorsement in favor of:

**“Los Angeles Unified School District and the Board of Education of the City of Los Angeles”**



## Division of Risk Management and Insurance Services

Vendor (Independent Contractor) Name: \_\_\_\_\_  
Please Print

### Waiver of Liability, Assumption of Risk, and Indemnity Agreement

**Waiver:** In consideration of part of the insurance requirements being waived, I, for myself, my heirs, personal representatives or assigns, do hereby release, waive, discharge from liability, and covenant not to sue, Los Angeles Unified School District (LAUSD), its officers, employees, and agents for liability from any and all claims resulting in personal injury, accidents or illnesses (including death), and property loss arising from this activity, but not limited to, services or products provided.

Activity or services provided: \_\_\_\_\_.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Assumption of Risks:** Engaging in the above activities/services carry with it certain inherent risks that cannot be eliminated regardless of the care taken to avoid injuries, accidents, mistakes, errors or omissions. The specific risks vary from one activity to another, but range from physical injuries such as from slips and falls to personal property damage or loss to include minor auto accidents or other unforeseen accidents.

I have read the previous paragraphs and I know, understand, and appreciate these and other risks that are inherent in this activity/event. I hereby assert that I do not currently maintain

**Business Automobile Liability**

**Worker's Compensation**

coverage for these risks, whether first party or third party, and that I knowingly assume all such risks as a part of the consideration for this activity and I understand I will not be covered by any of LAUSD's liability insurance coverage, whether self-insurance or commercial coverage.

**Indemnification and Hold Harmless:** I also agree to INDEMNIFY AND HOLD the LAUSD HARMLESS from any and all claims, actions, suits, procedures, costs, expenses, damages and liabilities, including attorney's fees brought as a result of participation in this event, activity or services and to reimburse LAUSD for any such expenses incurred by the District.

**Severability:** The undersigned further expressly agrees that the foregoing waiver and assumption of risks agreement is intended to be as broad and inclusive as is permitted by the laws of the State of California and that if any portion thereof is held invalid, it is agreed that the balance shall continue in full legal force and effect.

**Acknowledgment of Understanding:** I have read this waiver of liability, assumption of risk, and indemnity agreement. I fully understand its terms and I understand that I am giving up substantial rights, including my right to sue. I acknowledge that I am signing the agreement freely and voluntarily, and intend by my signature to be a complete and unconditional release of all liability to the greatest extent allowed by law.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**Office of Environmental Health and Safety**  
333 South Beaudry Avenue  
Los Angeles, CA 90017  
Phone: (213) 241-3199  
Fax: (213) 241-6816



## **ACTIVITY CHECKLIST FOR CARNIVALS AND OTHER EVENTS**

The following guidelines are recommended to ensure that a safe environment is provided for a successful event. The administrator or activity delegate is responsible for completing the form and fulfilling the requirements of the checklist.

### **Preliminary Procedures**

- Secure authorization from the Fire Prevention Bureau, Schools and Churches Unit or the local City or County Fire Department. L.A. City 213-978-3660/3, L.A. City (Valley Bureau) 818-374-1110, L.A. County Fire 818-362-5472, 323-264-7342 or 310-217-8395.
- Check for compliance with regulations and guidelines outlined in applicable bulletins and memorandums.
- Check area suitability for the proposed activity.
- Include a detailed list of all games or contests, with the "Request for Authorization for Student Body Expenditure and Receipt" or "Notice of Intent".
- All events must have permission to use the school property from Leasing and Asset Management before the event can occur. All events must comply with all LAUSD, city, state and federal regulations.
- It is the responsibility of the school to verify with the assistance of Risk Management that vendors have proper liability insurance .

The Los Angeles Unified School District will not approve the following types of activities: Sharp Darts or Arrows, Throwing of an Object at a Person (pies, sponges, balloons, etc.), Dunking Pupils or adults into Water Tanks, Destruction of Old Automobiles Using a Hammer or Other Means, Animal Rides, Trampolines, Climbing Walls, Bungee Jumping Equipment, Gyroscopes, Giant Slides, Food Eating Contests and Car Washes. See Bulletin 5353.0 for policy on mechanical rides. This is not an exclusive list and all activities are subject to review.

### **Activity Checklist**

#### **1. Booths, Bleachers, Platforms, etc.**

- Install booths made of non-combustible or fire resistive materials (plywood, pressed wood at least 1/4" thick or metal).
- Have Maintenance personnel inspect temporary seating, bleachers, etc., authorized by Civic Center permits and/or the individual school with final approval from the Office of Environmental Health and Safety (OEHS).
- If an aisle is only on one side, no more than 7 chairs may be bound together for any one group of chairs. The use of individual loose chairs is permitted up to total room capacity in rooms having an occupant load of 200 or less.

#### **2. Decorations**

- Use flameproof material. No flammable materials permitted.
- Stage seats, curtains, draperies, floats, wrapping paper, streamers & signs shall be made of flame retardant materials. Butcher paper may be used as a table cover if secured at all ends with no overhang.

#### **3. Electrical, Fire, Lighting**

- Temporary wiring, lighting, and appliances usage must be approved by the Electrical Technical Unit prior to event.
- Do not use any open flames, flame producing devices, candles, oil lamps or lanterns.
- Have an adequate number of portable fire extinguishers with proper classifications available or garden hoses.
- Fireworks and other pyrotechnic devices must be validated with a Fire Department Fire Permit obtained through the local fire authority having jurisdiction for the area the school is located.
- Barbeques and grills are approved for use when permitted by the local fire authority having jurisdiction. Only adults are permitted to use barbeques; no children may use equipment.
- Do not chain any doors closed.

#### **4. Food and Refreshments**

- Food preparation areas must be fully enclosed & have a cleanable floor surface.
- Water must be supplied through a food grade hose or stored in approved food grade containers
- Hot water shall have a minimum temperature of 120 degrees
- All booths that handle non -packaged food (including beverages) must have hand washing facilities within the booths.
- All booths using utensils require a 3 compartment metal sink.
- Approved toilet facilities must be located w/in 200' walking distance of all food booths
- All food or beverages that have been stored or prepared in a private home may not be offered for sale or given away. The only exception is non-potentially hazardous baked goods or candy.
- Food and beverages dispensed through LAUSD cafeteria kitchens must have a LAUSD Food Service Representative on site.
- Follow all applicable Health and Safety codes.

#### **5. Parking**

- Arrange parking in designated areas with permission of Principal. Locations must comply with Fire Department regulations.

#### **6. Rubbish**

- Provide metal rubbish containers for waste and empty them regularly
- Rubbish containers shall not obstruct aisles, pathways or exits.

#### **7. Salvage/Rummage Drives**

- Arrange for constant supervision during the removal of salvage/rummage goods.
- Loading and unloading of salvage must be conducted by authorized personnel such as a District person or other individuals trained for this activity.
- Used clothing is not approved for rummage sales.

#### **8. Screens and Barricades**

- Barricades shall not obstruct aisles, pathways or exits.
- Barricades shall be secured against falling.