



**BALDWIN COUNTY PUBLIC SCHOOLS**  
**Support Organizations**  
**Checklist of Requirements for School File**

Name of Organization: \_\_\_\_\_

School Year: \_\_\_\_\_

Documents required annually:

- \_\_\_\_\_ **Annual 990 Return for 501 (C) Organizations**
- \_\_\_\_\_ **Current fidelity bond/policy**
- \_\_\_\_\_ **Annual review of financial operations**
- \_\_\_\_\_ **Availability of financial records/reports upon request**
  - **Copy of all opened loan/lease agreements**
  - **Copy of all September bank account statements**  
(Check copies required)

Documents required as new officers are elected:

- \_\_\_\_\_ **Financial Operational Agreement**
- \_\_\_\_\_ **Officer Information Form**
- \_\_\_\_\_ **Bank Account Information Form**

Documents on file in school – Copies needed as updated by organization:

- \_\_\_\_\_ **Organization By-Laws**
- \_\_\_\_\_ **Copy of IRS determination letter of Employer ID Number**

**Additional Notes for File:**

- ❖ √ - Indicates items have been received and are on file with local school.
- ❖ Enter Date if items have been requested.