

## FORMS “CHEAT SHEET”

### USE OF FACILITIES FORMS

<u>FORM NAME</u>	<u>PURPOSE/USE</u>
Use of Facilities, Indemnity, and Insurance Agreement (Ed. Code 38134(a) Private Entities)	<p><b><u>Used with Non-Profit, Youth and Student-Related Support Entities (Direct Cost Recovery if Authorized)</u></b></p> <p>Applies to non-profit organizations, clubs, or associations organized to promote youth or school activities if they confirm that no other alternate location is reasonably available for their meeting or activity. Contemplated groups include Boy Scouts, Girl Scouts, PTAs, PTOs, and school-advisory groups.</p> <p>Liability insurance requirements should be in accordance with approved District requirements. If no requirements exist, suggested liability limits are at least \$1 million per occurrence/\$2 million in the aggregate. Insurance is required because, under Section 38134, each party must defend, indemnify and insure itself against risks of loss arising from its separate activities/obligations. The District cannot compel the group to name it as an additional insured under its liability policy.</p> <p>This form does not apply to any otherwise qualified group which intends to use school grounds for fundraising activities not directly beneficial to youth or public school activities of the District. (i.e., a girl scout bake sale for UNICEF)</p>
Use of Facilities, Indemnity, and Insurance Agreement (Non-Ed. Code 38134(a) Private Entities)	<p><b><u>Used with all Other Private Entities: Direct Costs and Fair Rental Value if Authorized</u></b></p> <p>Applies to all non-public agency groups who may use the facilities for entertainment or meetings. Groups contemplated by this provision include churches, religious organizations, charitable fundraisers not falling within the 38134(a) provisions, sports leagues (except for public entity-sponsored sports leagues), and political groups or organizations. The District can charge both direct costs and a “fair market rental” fee.</p> <p>Insurance requirements for liability arising from the group’s activities should be in accordance with approved district requirements. If no requirements exist, it is suggested that the liability limits be at least \$1 million per occurrence/\$2 million in the aggregate. District should obtain an “additional insured endorsement” from the group before the group actually begins use of the facility.</p>
Use Of Facilities Agreement Between Public Agencies	<p><b><u>Used with Any Other Public Entity: Costs are Fully Negotiable</u></b></p> <p>Applies to any public agency (Parks and Recreation Districts, the State of California, etc.) and its sponsored activities. A facility use fee is not required, but may be charged. Determination of an appropriate fee level will be based on the activity and imposition on the District’s resources.</p> <p>Indemnity and insurance requirements are fully negotiable and should be as broad/protective as the “All Other Private Entities Form.” Indemnity and insurance provisions will in each instance need to be carefully reviewed, particularly in circumstances in which the government agency is self-insured or covered by another Joint Powers Agency.</p>

## THE STUDENT-RELATED FORMS

<u>FORM NAME</u>	<u>PURPOSE/USE</u>
Agreement For Activity Participation (Students K-12)	<p><b><u>Used for all Student Activities, Clubs, and/or Special Classes (including after-school programs or classes involving special risks of harm or injury, including ROP/work experience classes)</u></b></p> <p>Before a K-12 student participates in extra-curricular or “risky”/”dangerous” curricular classes, this form should be executed acknowledging the risks associated with such activities (including risks of injury during transportation to and from off-site events), the student’s and parent’s agreed compliance with districts safety rules, and the authorization to administer emergency care in the case of injury.</p>
Contract For Adult Activity Participation	<p><b><u>Used for all Adult Education/Vocational Rehabilitation, etc. Classes involving special risks of harm or injury, including off-site training or work experience activities</u></b></p> <p>Before an adult education student participates in a class or program involving potentially “risky”/”dangerous” activities, this form should be executed acknowledging the risks associated with such activities (including risks of injury during transportation to and from off-site events), the adult student’s agreed compliance with districts safety rules, and the authorization to administer emergency care in the case of injury.</p>
“All Purpose” Form	<p><b><u>Used for Special Events that Don’t Easily Fall into Other Categories</u></b></p> <p>Alumni events (students and alumni), “fun runs” involving both students and adults, etc.</p>
Student Field Trip Authorization	<p><b><u>Used for all In-State Field Trips (Whether or not Overnight)</u></b></p> <p>While the Education Code provides immunity for field trip activities, the form requires parents to acknowledge the immunity laws, and the risks associated with the activity, as well as providing authorization to administer emergency care in the case of injury.</p>
Student Field Trip (Outside California) Authorization	<p><b><u>Used for all Out-of-State/Foreign Field Trips</u></b></p> <p>In addition to the issues covered by the standard field trip form, this form also notes the limitations on payment for travel-related costs and expenses and the risks of financial loss to the student/parent if the trip is cancelled for some reason.</p>
Medication Management	<p><b><u>Used for all Medication (prescription/non-prescription/IEP and Non-IEP/Assistance or Self-Administered)</u></b></p> <p>Self-contained form includes all information/waivers/authorizations necessary for all medications.</p>
Emergency Medical Assistance Opt-Out	<p><b><u>Used for all Parent/Guardian Decisions to Opt-Out of Emergency Medical Care and Assistance</u></b></p> <p>Can be used for both religious and non-religious decisions to direct withholding of emergency medical care.</p>
Access to Students by Law Enforcement/Social Service	<p><b><u>Used for Police/Social Service Interviews of Students Based on Non-District Related Matters</u></b></p>

## THE SPORTS FORMS

<u>FORM NAME</u>	<u>PURPOSE/USE</u>
Agreement For Team Participation	<p><b><u>Used for all Team Sports (CIF and Intramural), Band, Cheerleading, and Dance Team</u></b></p> <p>Before a student tries out for, participates in practices or training sessions, or is actually involved in team/group events, this form must be signed acknowledging the risks associated with such activities (including risks of injury during transportation to and from off-site events), the student's and parent's agreed compliance with districts safety rules, and the authorization to administer emergency care in the case of injury. The form also requires information regarding statutorily required insurance the student must provide, absent financial circumstances requiring that such insurance/coverage be obtained through other sources.</p>
Team Physical Form	<p><b><u>Used for all Team Sports (CIF and Intramural), Band, Cheerleading, and Dance Team</u></b></p> <p>Before a student tries out for, or participates in, any of the listed extra-curricular activities, the student must have (a) a parent or legal guardian complete the medical history, and (b) a medical doctor, doctor of osteopathy, or doctor-supervised nurse practitioner or physician's assistant conduct the examination and execute the form.</p>
Concussion Head Injury Information Sheet (General Content Required by Law – 1/1/2012)	<p>Sheet must be provided each year to students participating in any District-sponsored sports programs or activities (interscholastic, intramural, recreational); the only exception to the statutory requirement is for P.E. classes.</p> <p>If this form is not used, equivalent form must be issued by District each year</p>
Concussion Head Injury/Serious Injury Report Form (Optional)	<p>Form provides important information to a parent/health care provider regarding a serious injury/concussion/potential head injury.</p> <p>Used by District to track students removed from sports participation who cannot resume participation until they obtain medical clearance.</p> <p>Form also contains required medical clearance form to be executed only by MD/DO (required by law), except for non-concussion situations, where NP/PA can also sign.</p>

## THE TRANSPORTATION FORMS

<u>FORM NAME</u>	<u>PURPOSE/USE</u>
Volunteer Personal Automobile Use Form	<p><b><u>Used for all Adult Volunteer Drivers</u></b></p> <p>Before an adult is allowed to operate a private passenger vehicle (or a District-owned vehicle, should that ever be allowed), this form should be completed identifying their insurance and vehicle information, further confirming that the driver’s insurance coverage will be primary to any insurance coverage available to the District.</p> <p>The form also notes the driver’s obligation to maintain a safe vehicle and to operate that vehicle in a safe manner at all times. The form does not require the District to conduct “pull-notice” or other background checks, but it does authorize the District to conduct such reviews if it deems it appropriate to do so.</p>
Employee Personal Automobile Use Form	<p><b><u>Used for all Adult Employee Drivers</u></b></p> <p>Similar to the Volunteer Personal Automobile Form, this form addresses employee use of their personal automobiles on District business.</p>
Student Personal Automobile Use Form	<p><b><u>Used for all Student Drivers Transporting Themselves to/from Curricular/Extra-Curricular Events</u></b></p> <p><u>This is the first form</u> that must be completed before a student can drive himself/herself to a District-sponsored curricular or extra-curricular activity.</p> <p>This form contains basic information regarding the student’s license, insurance and vehicle information. The form also acknowledges that the driver’s insurance coverage will be primary to any insurance coverage available to the District. The form also notes the student’s obligation to maintain a safe vehicle and to operate that vehicle in a safe manner at all times. It does not require the District to conduct “pull-notice” or other background checks, but it does authorize the District to conduct such reviews if it deems it appropriate to do so.</p>
Student Alternate Transportation Form	<p><b><u>Used for all Student Drivers Transporting Themselves to/from Curricular/Extra-Curricular Events</u></b></p> <p><u>This is the second form</u> to be completed when a student is allowed to drive himself/herself to a District-sponsored curricular or extra-curricular activity. The Student Personal Automobile Use Form is used as a general screening form, making sure the student will be able to safely transport himself/herself to an event. This form must be signed by the supervising coach/teacher, and serves the separate purpose of gaining their approval for the student to transport himself/herself to the event. Some coaches/students do not want students to engage in such activities, so this form ensures that all involved parties agree to the self-transportation and the accountability of the student for such self-transportation.</p>

**EMPLOYMENT-RELATED FORMS**

<b><u>FORM NAME</u></b>	<b><u>PURPOSE/USE</u></b>
Employee Wellness/Gym Waivers	<b><u>Used for All District-Sponsored Gym/Fitness/Wellness Programs</u></b> Addresses workers' compensation/scope of work issues, and provides critical waivers/releases.
Hepatitis Vaccination Form	<b><u>Used for Employees Receiving Vaccinations as part of their Employment</u></b>

**OTHER FORMS**

Charter School Facilities	<b><u>Used for all District/Charter School Agreements for the Use of District Property for Educational Purposes</u></b>
DFEH and ADA Pamphlet	<b><u>Advises Parents/Public of the District's Compliance with Disability Access and DFEH Compliance Issues</u></b>
Contracts Form and Processes (below \$15,000)	<b><u>Used for all Contracts involving Costs/Payments Below \$15,000</u></b> Provides process, form contract, and instructions for managing small-dollar contracts. Includes all necessary terms and how to manage/integrate vendors purchase orders/proposed contracts.

## **NBSIA PROPERTY/LIABILITY REPORTING FORMS**

<b><u>FORM NAME</u></b>	<b><u>PURPOSE/USE</u></b>
Student Accident Report Form	<b><u>Used for Accidents Involving Students</u></b>
Vehicle Accident Report Form	<b><u>Used for Accidents Involving District Owned Vehicles</u></b>
Incident Report Form	<b><u>Used for accidents involving non-students (other than employees).</u></b>
Property Loss Report Form	<b><u>Used for loss or damage to district owned property or equipment.</u></b>
Large Property Loss Worksheet	<b><u>Used following large property loss in excess of \$100,000</u></b>
Property Update Form	<b><u>Used for adding/deleting/changing buildings, contents, portables and other District owned property.</u></b>
Rental Income Worksheet	<b><u>Used to Report Income Received by District via Rental/Lease of District Owned Property</u></b>
Report of School Closing	<b><u>Used to Report School/District Owned Site Closure</u></b>
New Vehicles Valued Over \$100K	<b><u>Used to Report Newly Acquired Vehicles with Value more than \$100,000</u></b>