



2024/2025 Trust Loyalty Credit Requirements

Each year, the Trust offers a program that allows districts to earn credits through the Trust Loyalty Credit (TLC) program. Since the inception of the TLC in 2010, we have returned \$61 million to our members.

For this year, members can earn up to 3% of their Trust contribution from the 2024/2025 year by participating in various loss control and risk management measures.

Preliminary Requirements

- participate in the Trust core coverages (both property and liability);
- have maintained membership in the Trust for three consecutive years (2022/2023, 2023/2024, and 2024/2025);
- have made a timely payment of the district's 2024/2025 contribution; and
- continue membership for the 2025/2026 policy year.

Options

Members can select from the options below to earn credit. Each option is worth 1% of your contribution. You can max out the credit by completing three options.

Vector Solutions

The Trust maintains a partnership with Vector Solutions to offer, via the SafeSchools products, several online courses to members on a variety of topics. The purpose of the partnership is to provide streaming education resources to district staff, with the intent of addressing some of the most common claims reported to the Trust.

To qualify for this item, at least 20% of the district's full-time equivalent employees must view at least one Vector Solutions training course and pass the corresponding quiz.

Regional Emergency Preparedness Consortium

School emergency preparedness consortiums: (1) help school personnel establish a foundation of emergency preparedness and planning; (2) assist personnel in providing planning and training support at all levels; and (3) encourage other public entities and community partners to become more involved in school safety and security.

To qualify for this item, the district must send a representative to at least one regional consortium meeting (attendance sheets at the meeting will provide a record of attendance and must be completely legible to verify member attendance).

Please reach out to Kaylee Sorensen (ksorensen@the-trust.org) for more information regarding registration, upcoming dates, and locations.

Attending a Transportation Leadership in Training course

Two tracts are available through the Leadership in Training curriculum: train-the-trainer and director/supervisor tracts. The Leadership in Training train-the-trainer program is geared toward driver trainers and includes time spent in the classroom and hands-on with a school bus. Participants receive training in all aspects of school bus driver instruction. Additionally, the Leadership in Training director/supervisor program offers training to administrators on key transportation administration topics, guidelines, and safety best practices.

To qualify for this item, the district must send a transportation representative to a Leadership in Training class (attendance sheets at the meeting will provide a record of attendance). Attendance at either curriculum tract will qualify the district for this loyalty credit item.

Complete and submit an Emergency Operation Plan (EOP) for review

Having an Emergency Operations Plan (EOP) in place is crucial for ensuring the safety of both students and staff. An EOP outlines the necessary procedures and protocols to be followed during a wide range of emergencies, including natural disasters, fires, active shooter situations, or medical emergencies. By implementing a well-defined EOP, schools can effectively respond to emergencies, significantly reduce potential harm, and ensure the safety of individuals while on campus. To qualify for this item, districts would be required to submit a copy of their EOP no later than **May 1, 2025**, along with scheduling a virtual meeting to review the Trust's recommendations. These submissions and meetings will be carried out by our Emergency Services Manager, Kaylee Sorensen, and our Emergency Management Consultant, Dylan Penserum. Their contact information is below:

Kaylee Sorensen (ksorensen@the-trust.org)

Dylan Penserum (dpenserum@the-trust.org)

Attend at least one Unemployment Insurance Webinar

Improper handling of Unemployment Insurance (UI) claims can lead to inefficiencies that can add administrative and financial burdens to school districts. It's imperative that unemployment insurance claims are managed properly to avoid such issues as well as maintain the integrity of the unemployment insurance benefits system.

Keith Oarde (our UI program manager) will be hosting a 3-part webinar series on the topics below:

- UI in Arizona
- UI Claims Protest
- UI Claims Appeals and Best Practices

To qualify for this item, you must attend a minimum of one webinar from the series.

Participate in an in-person or virtual cyber-specific tabletop exercise and submit a cyber-incident response plan (CIRP) for review

Creating and implementing a cyber incident response plan with your district will improve efficiency and promote effective communication among team members, ensuring a cohesive response if a cyber-incident occurs.

Please submit a copy of your completed CIRP and Cyber Communication plan to your Member Services Coordinator.

Virtual tabletops must be attended by a district's entire cyber team, have a team lead to serve as facilitator, and the team members must be in the same room to participate together.

The Trust cyber tabletop webinar provides a practical and interactive approach to testing and refining your cyber incident response plan. You'll be presented with simulated cyber incidents, allowing you to:

- Assess your response team's preparedness, decision-making skills, and coordination abilities, identifying any gaps in your response.
- Develop a deeper understanding of team roles and responsibilities.
- Promote effective communication.
- Build the confidence to handle complex and evolving threats.

These tabletops will be 120-minute-long exercises, and work best if other members of your team are in the same room so you can discuss your district's unique processes.

Upcoming dates and times for virtual tabletops are below:

- November 19, 2024 at 1pm
- February 18, 2025 at 9am
- May 20, 2025 at 1pm

Attending one of the following Risk Management Summits, in person:

- November 2024 Loss Control Summit
- February 2025 Liability RMS

The Risk Management Summit (RMS) is an annual, day-long training session designed to help educate members on safety and liability issues currently facing Arizona schools. To qualify for this item, an employee from the district must attend the RMS in person.

Attending both property related webinars hosted by Trust Loss Control

To ensure the smooth functioning of a district, it is crucial to understand the importance of preventative maintenance and how to handle specific property losses. These factors can have a significant impact on the overall operations and financial stability of the district.

In light of this, Loss Control will be hosting a 2-part webinar series that focuses on discussing the necessary preventative measures that should be implemented by maintenance staff. This webinar series aims to equip staff with the knowledge and skills required to effectively address maintenance issues and minimize property losses, ultimately benefiting the district.

Dates of the webinars are below:

- April 22, 2025
- May 8, 2025

To qualify for this item, districts must have their facility or maintenance staff attend both webinars to receive the credit.

Attending one of the Trust Leadership Academies in October 2024 or June 2025

The Leadership Academy is a unique learning experience for school administrators. Academy participants learn about legal risks relevant to schools, including those related to employment issues, abuse reporting, and special education. Attendees work with Arizona's foremost school attorneys and educational leadership experts to analyze real-life scenarios and talk through solutions.

The three-day academies will occur on:

- October 1-3, 2024 in Tubac, and
- June 11-13, 2025 in Flagstaff