



2025/2026 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 its inception in 2010, the TLC program has returned \$64 million to our members.

For this year, members can earn up to 3% of their Trust contribution from the 2025/2026 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 (2023/2024, 2024/2025, and 2025/2026).
- Have made a timely payment of the district's 2025/2026 contribution.
- Continue membership for the 2026/2027 policy year.

Options to Earn Credits

Members who meet the preliminary requirements may complete any of the following items by May 31, 2026, to qualify for a maximum of 3% back to the district:

Vector Solutions

The Trust partners with Vector Solutions to offer online courses through the SafeSchools platform. These courses cover a variety of topics and provide streaming educational resources to district staff, with the goal 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 complete 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 serve as a record of attendance and must be legible to verify participation.

For more information regarding registration, upcoming dates, and locations, please contact Kaylee Sorensen at ksorensen@the-trust.org.

Attending a Transportation Leadership in Training course

Two tracks are available through the Leadership in Training curriculum:

- Train-the-Trainer Track: Geared toward driver trainers, this program includes classroom instruction and hands-on training with a school bus.
- Director/Supervisor Track: 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 administrator to a Leadership in Training class. Attendance sheets will serve as a record of participation.

Upcoming Dates:

- January 16, 2026, in Tucson
- February 13, 2026, in Phoenix
- May 7, 2026, in Flagstaff

Complete and submit an Emergency Operations Plan (EOP)

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 must:

- Submit a copy of their EOP by May 1, 2026.
- Schedule 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:

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- Kaylee Sorensen (ksorensen@the-trust.org)
- Dylan Penserum (dpenserum@the-trust.org)

Validating implementation of multi-factor authentication (MFA) and endpoint detection and response (EDR) cyber requirements

Voluntarily validate the implementation of Multi-Factor Authentication (MFA) and Endpoint Detection and Response (EDR) to ensure key cybersecurity protections are in place.

To qualify for this item, upload supporting evidence directly in the cyber Values Collection (available in December 2025) under the evidence upload section.

Alternatively, documentation can be submitted to the Cyber Team at cyber@cyberpools.org or alex.robles@cyberpools.org.

Attend a Risk Management Summit (RMS)

The Risk Management Summit (RMS) is an annual, day-long training session designed to educate members on safety and liability issues facing Arizona schools.

To qualify for this item, an employee from the district must attend one of the following summits in person:

- November 2025 Loss Control Summit
- February 2026 Liability RMS

Attending at least two facility-focused workshops presented by the Trust Loss Control Department:

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.

Considering this, Loss Control will host a variety of facilities workshops, including Lunch & Learns, Facilities LIT sessions, and roofing workshops.

To qualify for this item, facility or maintenance staff must attend two facility-focused workshops.

Workshop Dates:

- Lunch & Learn: October 3, 2025
- Roofing Workshop: October 16, 2025
- LIT Facilities: November 7, 2025
- LIT Roofing (Phoenix): January 22, 2026
- LIT Maintenance & Facilities (Phoenix): January 30, 2026

- LIT Roofing (Tucson): March 5, 2026
- LIT Roofing (Phoenix): April 16, 2026
- LIT Maintenance & Facilities (Flagstaff): April 23, 2026

Attending one of the Trust Leadership Academies in October 2025 or June 2026

The Leadership Academy is a three-day learning experience for school administrators. Participants learn about legal risks relevant to schools, including employment issues, abuse reporting, and special education.

To qualify for this item, an administrator must attend one of the following academies:

- October 8-10, 2025, in Tubac
- June 17-19, 2026, in Flagstaff

Completion of Trust's Prevention Gap Analysis for sexual abuse/molestation prevention

The Prevention Gap Analysis evaluates district practices for sexual abuse/molestation prevention.

To qualify for this item, districts must:

- Complete the analysis.
- Identify at least one follow-up step to enhance prevention efforts.
- Document the completed analysis and follow-up step(s).