Washington State PTA (WSPTA) provides this Standards of Affiliation (SOA) Agreement Checklist to provide support and guidance to local PTAs and councils. Completing this checklist will help local PTA and council leaders ensure their independent nonprofit business remains current with all IRS, state, insurance, and PTA requirements. We encourage you to include your entire board of directors in this work, to keep your membership up to date with your progress, and to record progress in meeting minutes. There are two checklists in this document: one for councils and one for local PTAs. Please ensure you are using the correct checklist, as the requirements differ slightly.



**Washington State PTA**

**Standards of Affiliation Agreement Checklist**

## What changed in the last two years?

* Electing a vice president has been removed as a requirement. State law only requires a president, secretary and treasurer be elected.

*WSPTA Uniform Bylaws* were amended at the 2022 convention to align with the change to state law.

* Current fiscal year members must be entered into the WSPTA membership database within 30 days of transaction. This allows PTAs that “presell” memberships in the Spring for the next fiscal year to enter those into the database within 30 days of it reopening in July.

## WSPTA has many SOA resources available to help answer questions and give more detail on all requirements.

1. [*Tips and Best Practices*](https://www.wastatepta.org/wp-content/uploads/2024/08/2024-2025-SOA-Tips-and-Best-Practices-FINAL.pdf)explains each requirement in detail, and includes links to numerous resources, best practices, and ideas for success.
2. Still have questions? Our [*Frequently Asked Questions*](https://www.wastatepta.org/wp-content/uploads/2024/08/2024-2025-SOA-FAQ-FINAL.pdf)document is a good place to start.
3. Local PTAs and councils can track progress toward meeting the WSPTA training requirement on the [*WSPTA Training Tracking spreadsheet*](https://www.wastatepta.org/wp-content/uploads/2024/08/WSPTA-Training-Tracking-for-2024-2025-1.xlsx)***.***
4. The SOA should be mentioned in local PTA and council standing rules. Get [*Standing Rules Language*](https://www.wastatepta.org/wp-content/uploads/2024/08/2024-2025-Suggested-Standing-Rules-FINAL.pdf)here.
5. Need support? Contact your [*Region Director*](https://www.wastatepta.org/pta-leaders/pta-regions/)***.***

Standards of Affiliation Agreement Checklist (2024)

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## “In Good Standing” and “Participation Eligibility.”

PTAs who have completed the requirements on the checklist are said to be “in good standing” and may participate fully in all benefits that come with being affiliated with PTA (See ***Frequently Asked Questions*** for more details.) Specific SOA requirements may be verified to confirm local PTA and council eligibility to:

* + Receive grants or program participation funds from WSPTA or National PTA.
  + Participate in WSPTA and National PTA awards and other programs, including the Reflections program at the national level.
  + Send voting delegates to WSPTA convention and legislative assembly based on *WSPTA Uniform Bylaws.*
  + Bring issues and resolutions to WSPTA for consideration.

Participation Eligibility Requirements:

* + Officer names/contact information: At a minimum WSPTA needs a president or primary point of contact.
  + 25-member minimum: Had at least 25 members (or an approved waiver) the prior fiscal year. Enroll at least 25 members for the current fiscal year no later than October 31.
  + Membership dues paid: Membership dues paid in full for the previous fiscal year. Payment of current fiscal year membership dues shall be current.
  + Legal filings: All required legal filings with the Washington Secretary of State and IRS are current. (new this year)

# WSPTA Standards of Affiliation Agreement for Local PTAs 2024 – 2025

In addition to the items listed below, local PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted WSPTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA.

For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a region director. Additional resources, including review processes, are on the WSPTA website [(wastatepta.org/pta-leaders/governance/).](http://www.wastatepta.org/pta-leaders/governance/))

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Required By** | **#** | **Requirement** | **Fiscal**  **Year** | **Best Practice/Specifics (WSPTA fiscal year is July 1 – June 30)** | **Responsible PTA Leader** | **Date(s) Completed** |
| **State of Washington** | 1. | Officers elected | Current | Officers were elected at a membership meeting (recommended before previous fiscal year-end). State law requires president, treasurer, and secretary. | Judy Kaethler | 4/30/2024 |
| 2. | Corporate Annual Report filed | Current | Filed by annual corporate renewal date (end of the month your PTA incorporated). | Anita Yee/ Radha Arora |  |
| 3. | Charitable Organization Registration renewed | Prior | **OPTION 1:** More than $50,000 in gross receipts - required to file by May 31.  **OPTION 2:** Not required to file - will file/update the optional filing.  **OPTION 3:** Not required to file - choose not to do the optional filing.  \*Once an account is created with the Secretary of State, it must be maintained yearly. | Option 3 | N/A |
| **IRS** | 4. | Form 990 filed | Prior | Filed the appropriate IRS Form 990 no later than November 15 (or file the necessary extension and file by the deadline). | Anita Yee/Radha Arora | 9/17/2024 |
| **Insurance** | 5. | Year-end financial review | Prior | Year-end financial review was conducted (recommended by August 31). | Anita Yee | 7/15/2024 |
| **WSPTA** | 6. | Officer names/contact info | Current | Entered names and contact information for all elected officers (and key non-elected positions such as membership, advocacy/legislative, Reflections, programs, and family & community engagement) in the membership database (recommended before previous fiscal year-end, update as needed.) | Judy Kaethler | June 2024 |
| 7. | Budget approved | Current | Budget was approved by the membership (recommended before previous fiscal year- end). | Anita Yee/Radha Arora |  |
| 8. | Standing rules approved | Current | Standing rules were updated as needed and approved by the membership (recommended at first membership meeting of the current fiscal year). | Judy Kaethler |  |
| 9. | Nominating committee elected | Current | Three members were elected to a nominating committee at least 30 days prior to the election of officers. (Recommended at the first  membership meeting of the current fiscal year.) | Judy Kaethler |  |
| 10. | Insurance | Current | Purchased appropriate insurance (prior to November 30 to prevent lapse | Anita Yee/Radha Arora |  |
| in coverage). |
| 11. | Annual training | Current | Annually, at least one elected officer attends PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before the year’s WSPTA convention. Maintain documentation showing each elected officer  satisfied the annual training requirement. | Monica Lombana |  |
| 12. | 25-member minimum | Current & Prior | Had at least 25 members (or approved membership waiver) the prior fiscal year. Enroll at least 25 members for the current fiscal year no later than October 31. | Membership Chair | 8/2024 |
| 13. | Membership dues paid | Current & Prior | Membership dues paid in full for the previous fiscal year. Current fiscal year membership dues shall be paid upon receipt. Enter current fiscal year  members within 30 days. | Anita Yee/Radha Arora | Up to date |

# WSPTA Standards of Affiliation Agreement for Councils 2024 – 2025

In addition to the items listed below, local PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted WSPTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA.

For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a region director. Additional resources, including review processes, are on the WSPTA website [(wastatepta.org/pta-leaders/governance/).](http://www.wastatepta.org/pta-leaders/governance/))

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Required By** | **#** | **Requirement** | **Fiscal Year** | **Best Practice/Specifics (WSPTA fiscal year is July 1 – June 30)** | **Responsible PTA Leader** | **Date(s) Completed** |
| **State of Washington** | 1. | Officers elected | Current | Officers were elected at a membership meeting (recommended before previous fiscal year-end). State law requires president, treasurer, and secretary. |  |  |
| 2. | Corporate Annual Report filed | Current | File by annual corporate renewal date (end of the month your council incorporated). |  |  |
| 3. | Charitable Organization Registration renewed | Prior | **OPTION 1:** More than $50,000 in gross receipts - required to file by May 31.  **OPTION 2:** Not required to file - will file/update the optional filing.  **OPTION 3:** Not required to file - choose not to do the optional filing.  \*Once an account is created with the Secretary of State, it must be maintained yearly. |  |  |
| **IRS** | 4. | Form 990 filed | Prior | File the appropriate IRS Form 990 no later than November 15 (or file the necessary extension and file by the deadline). |  |  |
| **Insurance** | 5. | Year-end financial review | Prior | Year-end financial review was conducted (recommended by August 31). |  |  |
| **WSPTA** | 6. | Officer names/contact info | Current | Entered names and contact information for all elected officers (and key non-elected positions such as membership, advocacy/legislative, Reflections, programs, and family & community engagement) in the membership database (recommended before  previous fiscal year-end, update as needed) |  |  |
| 7. | Budget approved | Current | Budget was approved by the membership (recommended before previous fiscal year-  end). |  |  |
| 8. | Standing rules approved | Current | Standing rules, including the amount of any council fees, were updated as needed and approved by the membership (recommended at first membership meeting of the  current fiscal year). |  |  |
| 9. | Nominating committee elected | Current | Three members were elected to a nominating committee at least 30 days prior to the election of officers. (Recommended at the first membership meeting of the current  fiscal year.) |  |  |
| 10. | Insurance | Current | Purchase appropriate insurance (prior to November 30 to prevent lapse in coverage). |  |  |
| 11. | Annual training | Current | Annually, at least one elected officer attends PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before the year’s WSPTA convention. Maintain documentation showing each elected officer satisfied the  annual training requirement. |  |  |
| 12. | Council Reflections Program | Current | Offer a Reflections program for local PTAs. |  |  |
| 13. | Provide service to local PTAs | Current | Provide services, information, support, and leadership training to local PTAs. Maintain documentation showing services provided by the council. (Recommend budget, yearly calendar, newsletters, or other communication.) |  |  |