

WSPTA Standards of Affiliation Agreement Checklist 2017-18

To provide support and guidance to our local PTAs and councils, Washington State PTA (WSPTA) is providing this Standards of Affiliation (SOA) Agreement Checklist to help navigate legal requirements. 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 and to keep your membership up to date with your progress. If you need assistance with this checklist, help understanding any of the SOA agreement requirements, or find that a requirement was not completed the previous year, please contact your council (if applicable) or region director. Additional SOA resources are on the website (www.wastatepta.org/pta-leaders/governance/). **We are here to help!**

Local PTA or Council Name and #: _____

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). Washington State law requires president, vice president, treasurer, and secretary.		
	2.	Corporate renewal filed	Current	File by annual corporate renewal date (end of the month your PTA incorporated).		
	3.	Charitable solicitations filed	Prior	OPTION 1: More than \$50,000 in gross receipts - required to file by May 31. OPTION 2: Not required to file - have or will file the free one-time optional filing. OPTION 3: Not required to file - choose not to do the free one-time optional filing.		
IRS	4.	990 form filed	Prior	File the appropriate IRS 990 form 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-Local PTAs & Councils (Also agree to uphold the ethics, policies, and principles of PTA)	6.	Officer names/contact info	Current	Enter 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 were updated as needed and approved by the membership (recommended at first membership meeting of the current fiscal year).		
	9.	Insurance	Current	Evaluate and purchase appropriate insurance (prior to November 30 to prevent lapse in coverage).		
	10.	Training requirement	Current	Satisfy the annual training requirement (at least one elected officer attend PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before this year's WSPTA convention). Maintain documentation showing each elected officer satisfied the annual training requirement.		
WSPTA-Local PTAs only	11.	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 June 30.		
	12.	Membership invoices paid	Current & Prior	Membership invoices paid in full for the previous fiscal year. Current fiscal year membership invoices shall be paid upon receipt.		
WSPTA-Councils only	13.	Council Reflections program	Current	Offer a Reflections program for your local PTAs.		

Per the WSPTA Uniform Bylaws, a local PTA or council in good standing is one that meets the criteria in the above standards of affiliation agreement.

This checklist is for your internal monitoring purposes only and does not need to be turned in to WSPTA, unless your local PTA or council is selected for periodic review.