



## Standards for Continued Affiliation with Arizona PTA

**Purpose:** Provide standards for continued affiliation with Arizona PTA and to provide the process to be used when working with a PTA affiliate that is not in compliance with the Standards for Continued Affiliation. PTA affiliates refer to all chartered in Arizona.

**Background:** Local PTAs fall under the corporation of Arizona PTA and as such, must abide by the outlined standards to maintain their affiliation with Arizona PTA and National PTA. As a 501(c) (3), there are many requirements placed on the association by the IRS; therefore, Arizona PTA has a duty of care and responsibility to ensure local PTAs adhere to those requirements.

Arizona PTA shall be responsible for monitoring compliance of all PTAs.

### Units in Good Standing:

- Adhere to the purposes and basic policies of PTA
- **Officers Roster:** Submit an annual Officers list with the names and contact information for newly elected and continuing PTA Officers within ten (10) days of the election, when a vacancy occurs or with the change of officers.
- **Membership Dues:** Send membership dues, dues remittance forms, and a membership roster to Arizona PTA on a monthly basis. The first submission is due no later than September 30<sup>th</sup>.
- **Membership:** Maintain a membership roster of no less than ten (10) PTA members.
- **Insurance:** Pay insurance premiums to Arizona PTA no later than June 30<sup>th</sup>. A late fee will be assessed if postmarked after July 1<sup>st</sup>.
- **Training:** Local PTA elected officers must attend training every year by September 30<sup>th</sup>. Officers elected after September 30 must arrange training within 45 days of taking office with their Region Director.
- **Financial Review / Professional Audit:** Submit a copy of the completed annual PTA Financial Review / Professional Audit packet and final treasurer's report to Arizona PTA by September 30<sup>th</sup> accompanied by general meeting minutes expressing membership approval.
- **Budget:** Submit a copy of the current year Local PTA budget, approved by the general membership, to Arizona PTA no later than September 30<sup>th</sup>, accompanied by a copy of the general meeting minutes expressing general membership approval
- **Taxes:** Submit a complete copy of IRS form 990, 990 EZ or 990-N e-postcard to Arizona PTA by November 30<sup>th</sup>
- **Bylaws:** Adopt the current version of the Unified Local PTA/PTSA Unit bylaws approved according to the procedures of Arizona PTA; submit a copy of the official meeting minutes expressing general membership approval. If no amendments have been adopted at Arizona or National PTA Convention, the unified local unit bylaws should be reviewed annually with general membership.
- Comply with IRS regulations and Arizona revised statutes governing 501(c)(3) organizations
- Make all records of the local PTA available to a designated Arizona PTA representative upon request

### Benefits of Compliance with Standards

1. Access to State and National PTA Programs
2. Maintain the PTA's 501(c)(3) designation
3. Help to ensure that the PTA is in compliance with insurance requirements
4. Use PTA materials and attend PTA events at rates charged to PTAs
5. Participation in awards programs at state and national levels
6. Use of official PTA and PTSA logo
7. Use of service marks (including PTA<sup>®</sup> and PTSA<sup>®</sup>) in conjunction with the name of the local PTA
8. Send voting delegates to Arizona PTA's annual convention and the ability to request voting delegate status at National PTA's annual conventions
9. Submit resolutions, amendments to Arizona PTA bylaws, and nominations for Arizona PTA offices for consideration by Arizona PTA
10. Eligible for grants and program participations funds, including those from National and Arizona PTA.

### Process for Compliance with Standards

The Region Director, Vice President or a designated PTA Board member shall do a monthly review of the unit status and make monthly contact with local PTAs that are not in good standing and offer assistance for bringing them into compliance with the Standards for Continued Affiliation.

In the event that a local PTA fails to meet the minimum standards for units in good standing, that PTA will be notified in writing of the intent to revoke the PTA's charter with Arizona PTA. If the local PTA is affiliated with a school, that school's administration will be copied on the written notice of revocation.