

Local PTA/PTSA Unit Name: \_\_\_\_\_  
School District: \_\_\_\_\_  
EIN: \_\_\_\_\_ National PTA ID Number: \_\_\_\_\_

Related to Unified Local Unit PTA/PTSA Bylaws Article V-Local PTA/PTSA Units: A Local PTA Unit in “Good Standing” adheres to the following standards of affiliation and criteria, the following gives the details for Local PTA/PTSA to meet the administration details for each individual PTA Unit:

**Units in Good Standing:**

1. Adhere to the purposes and basic policies of PTA
2. **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.
3. **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.
4. **Membership:** Maintain a membership roster of no less than ten (10) PTA members
5. **Insurance:** Pay insurance premiums to Arizona PTA no later than June 30. A late fee will be assessed if postmarked after July 1.
6. **Training:** Local PTA elected officers must attend training every year by **September 30**. Officers elected after **September 30** must arrange training within 45 days of taking office with their Region Director.
7. **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**.
8. **Budget:** Submit a copy of the current year Local PTA budget, approved by the general membership, to Arizona PTA no later than **September 30**, accompanied by a copy of the general meeting minutes expressing general membership approval
9. **Taxes:** Submit a complete copy of IRS form 990, 990 EZ or 990-N e-postcard filed before Nov 15 to Arizona PTA by **November 30**
10. **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.
11. Comply with IRS regulations and Arizona revised statutes governing 501(c)(3) organizations
12. 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, Unified Local Unit PTA/PTSA 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.

**Tax Exempt Status:** This unit is recognized by the IRS as a tax-exempt corporation within the umbrella exemption provided by the Arizona PTA under Section 501(c)(3). The Group Exemption Number of all units within the Arizona PTA umbrella is **1582**.

- The treasurer shall be responsible for filing all regulatory forms, especially IRS form 990-N, 990-EZ, or 990 as is required annually by IRS code and the Secretary of State Annual Corporation Report.

**Membership dues amount:** The membership dues for this unit shall be \$\_\_\_\_\_. This amount includes \$4.50 for Arizona and National PTA dues.

- The President or the President’s designee will send membership roster (listed alphabetically by last name) and dues payment monthly to Arizona PTA.

**Elected officers:** The elected officers shall be a president, vice-president, secretary, and treasurer. (Optional) In addition, the following vice-presidents will be elected.

\_\_\_\_\_  
\_\_\_\_\_

The officers of this unit shall be elected at the general membership meeting in the month of insert month, to serve a term of (1 or 2) years. A person shall not be eligible to serve more than 2 consecutive terms in the same office or until a successor is available to be elected.

New officers will take office on July 1.

- The President or the President’s designee will send the annual officer’s roster by the due date specified by Arizona PTA or within 10 days of change of officers.

**Nominating Committee:** Three (3) members will be elected at least two months prior to election of officers by one of the entities outlined in the Unified Local Unit PTA/PTSA Bylaws. The nominating committee for this PTA shall be elected by the general membership.

- The committee shall elect its own chairperson.
- The president does not serve on this committee.

**Executive Committee:** Shall consist of the elected officers and may include appointed standing committee chairs and others. List additional members here:

\_\_\_\_\_  
\_\_\_\_\_

*(Note whether or not they all have a vote on the Executive Committee)*

**Executive Committee Meetings:** Shall be held \_\_\_\_\_ (i.e.: 2<sup>nd</sup> Tuesday, 7:00 p.m.)

\*\*At all meetings of the executive committee, a majority of the committee members shall constitute a quorum for the transaction of business.

Special meetings of the executive committee may be called by the president or at the request of a majority of the board with \_\_\_\_\_ days notice.

**Executive Committee:** Shall be all elected officers of this PTA. The quorum shall be a majority of the executive committee. Special meetings of the executive committee may be called by the president or upon written request of \_\_\_\_\_ (number of) members with \_\_\_\_\_ days notice to each member.

**Standing Committees:** The standing committees of this PTA are *(list committees)*.

\_\_\_\_\_  
\_\_\_\_\_

**General Membership Meetings:** A minimum of three (3) meetings shall be held each year though this PTA has the option of additional meetings. The months and date will be \_\_\_\_\_ (i.e.: 3<sup>rd</sup> Tuesday, 7:00 p.m.) The election meeting will be held in April or May. Notification for members shall include the date, time, place and purpose of each annual and regular general membership meeting with at least ten (10) days but not more than sixty (60) days before the meeting date. Ten (10) Seven (7) days notice must be given of a change in meeting dates or times.

A quorum at General Membership Meetings shall be \_\_\_\_\_ executive committee members (one in the role of presiding officer and one in the role of secretary) and a minimum of \_\_\_\_\_ members shall constitute a quorum.

Special meetings of the general membership may be called by the president, or at the request of a majority of the executive committee, or a majority of the membership. At least seven (7) days notice shall be given.

**Voting delegates** to PTA Council, if unit is a Council member, and Arizona PTA Convention (as outlined by each) shall be chosen in the following manner:

- *If a member of a PTA Council:* voting delegates/members will be according to the membership guidelines as established in the PTA Council Standing Rules.
- *Voting Delegates at the Annual Arizona PTA Convention:* this PTA shall have four voting delegates plus one (1) additional voting delegate per fifty (50) members as reported to the Arizona PTA by March 1. Voting delegates for the Arizona PTA Convention shall be determined by majority vote of the Executive Committee of this PTA unit by: [\(list date of election meeting\)](#).

This PTA may choose to budget funds for approved members to attend the Arizona PTA Convention and/or the National PTA Convention.

- This PTA may allow students to be voting members of its delegation. Children should be at an age where they are able to understand and decide on their own behalf, without prompting, how to vote regarding any PTA business. Designate the ages allowed for student voting here if this PTA allows students to be eligible to vote \_\_\_\_\_.

**Fiscal year** will be July 1-June 30.

- ✓ Two signatures should be required on all checks.
- ✓ An annual financial review of this PTA's financial records is required. [Designate when the financial review will be completed after your fiscal year ends.](#)
- ✓ Budget is proposed and approved at the first general membership meeting.

**Legal documents:** -Include Arizona PTA Bylaws, Unified Local Unit Bylaws, and Standing Rules.

**Record retention:** (See National PTA's Money Matters Quick Reference Guide).

**Amendments:** These standing rules may be amended at any time by a majority of the members present if a quorum has been established and prior notice to amend was given. If no notice to amend was given, and a quorum is established, a 2/3-majority vote of the members present is needed.

These standing rules shall be read and approved at the first general meeting of each membership year and may be read by request at any meeting or shall be available for reading.

Date of last review: [insert date](#) \_\_\_\_\_

- ✓ A copy of these standing rules shall be given to all members of the Executive Committee.
- ✓ One (1) copy shall be mailed to the Arizona PTA Office annually.
- ✓ A copy of the meeting minutes showing membership adoption shall be forwarded to the Arizona PTA office for review to ensure no conflicts with Unified Local Unit Bylaws, AZ PTA Bylaws, NPTA Bylaws, Arizona Revised Statutes and/or insurance policy requirements.
- ✓ If amended, a copy of the new document must be forwarded to the Arizona PTA Office.

**Committees:**

- There are two (2) types of committees: standing committees and special committees.
- Standing committees carry on the work of the PTA on an ongoing, month-to-month basis.
- Special committees have work on a short-term basis, for 1-3 months, 1 or 2 events and go out of existence once project is completed.
- This decision is intentionally left for PTAs to indicate which committees are standing committees and special committees to offer PTAs flexibility in determining the best way for it to carry out the PTA mission with the exception of the two (2) required standing committees: audit and nominating.

**Standing Committees:**

- Chairs of standing committees are members of the executive committee, attend executive committee meetings, vote and are counted in the quorum for executive committee meetings.
- Chair presents plan of work to the executive committee for approval prior to starting committee activities. Please see Appendix for plan of work.
- Chair delivers all PTA correspondence to the president for approval by president and principal prior to distribution to school, community or staff.

The executive committee shall have the following standing committees (Please see unified local unit bylaws):

1. Audit Committee – elected by membership at May meeting.
2. Nominating Committee – elected by membership at March meeting.

The executive committee may establish additional standing committees at any time as needed.

**Finances:**

Finance and Budget: Please see uniform PTA bylaws Article IX Duties of Officers Section 5 (five). List here financial procedures established by your Executive Committee and Treasurer.

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This PTA funds are in the following depository/financial institution/bank: (Provide name and address)

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The standing rules were adopted by a majority vote of the general membership on \_\_\_\_\_.

\_\_\_\_\_ PTA  
 President Print Name PTA President Signature

\_\_\_\_\_ PTA Secretary Print Name PTA Secretary Signature

\*\*If standing rules are amended, it must be recorded in the minutes of the meeting where amended. A revised copy of the Standing Rules should then be sent to all members of the Executive Committee and Arizona PTA noting the date they were amended.