

# Washington State PTA Standards of Affiliation Agreement Checklist



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. Update your progress in the SOA section of your memberplanet account for convenient reference.

## What changed this year?

Members must be entered into the WSPTA membership database within 30 days of transaction.

IRS 8822-B has been removed since it does not need to be done each year, only when the responsible party changes. More information can be found in our Frequently Asked Questions document.

Language updated for filings to align with WA Secretary of State terminology.

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

1. [Tips and Best Practices](#) 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](#) document is a good place to start.
3. Local PTAs and councils can track progress toward meeting the WSPTA training requirement on the [Training Tracking Spreadsheet](#).
4. Unsure about the training requirement? The [Training Requirement Flow Chart](#) has more detail.
5. The SOA should be mentioned in local PTA and council standing rules. Get [Standing Rules Language](#) here.
6. Need support? Contact your [Region Director](#).

### **“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 invoices paid: Membership invoices paid in full for the previous fiscal year. Payment of current **fiscal year membership invoices shall be current.**

## WSPTA Standards of Affiliation Agreement for Local PTAs 2021 – 2022

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 ([www.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, vice president, treasurer, and secretary.	Wei Luo	06/09/2021
	2.	Corporate Annual Report filed	Current	Filed by annual corporate renewal date (end of the month your PTA incorporated).	Michelle Zhou	05/2022
	3.	Charitable Organization Registration renewed	Prior	<b>OPTION 1:</b> More than \$50,000 in gross receipts - required to file by May 31. <b>OPTION 2:</b> Not required to file - will file/update the optional filing. <b>OPTION 3:</b> 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.	Wei Luo	06/05/2021
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).	Wei Luo	11/05/2021
Insurance	5.	Year-end financial review	Prior	Year-end financial review was conducted (recommended by August 31).	Cindy Lu	07/03/2021
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.)	Mei Zhang	09/2021
	7.	Budget approved	Current	Budget was approved by the membership (recommended before previous fiscal year-end).	Wei Luo	06/09/2021
	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).	Manda Mangrai	10/06/2021
	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.)	Manda Mangrai	04/2022
	10.	Insurance	Current	Purchased appropriate insurance (prior to November 30 to prevent lapse in coverage).	Michelle Zhou	11/2021
	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.	Priyanka Gulati	10/31/2021
	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.	Mei Zhang	09/30/2021
	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 members within 30 days.	Cindy Lu	

## WSPTA Standards of Affiliation Agreement for Councils 2021 – 2022

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 ([www.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, vice 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	<b>OPTION 1:</b> More than \$50,000 in gross receipts - required to file by May 31. <b>OPTION 2:</b> Not required to file - will file/update the optional filing. <b>OPTION 3:</b> 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.)		