

Purpose and Scope: Arizona PTA has the authorization to charter local PTA/PTSA units and PTA Councils. A Charter creates a contract between the constituent associations, the local PTA/PTSA unit or PTA Council, and Arizona PTA. Arizona PTA requires all constituent associations to adhere to the regulations, rules, criteria set by Arizona PTA. Arizona PTA has the authority and procedures to address constituent organizations that do not adhere to the "Standards of Affiliation" for a local PTA/PTSA unit or a PTA Council.

The local PTA/PTSA unit President and Treasurer will initial this checklist to signify understanding of the Compliance Standards of Affiliation for Arizona PTA constituent associations and return the signed and initialed copy to their designated Region Director/Field Services Chair or Representative.

Process for Compliance with Standards of Affiliation: The Arizona PTA Vice-President will designate the Arizona PTA representative(s) who shall do a monthly review of the constituent association(s) status and make contact with those that are not in compliance with the "Standards of Affiliation". Local PTA/PTSA units and PTA Councils in compliance are considered to be in "Good Standing". Non-compliance for not paying the mandated Insurance policy premium will result in suspension of the local PTA/PTSA unit or PTA Council. This includes being removed from eligibility for Arizona PTA and National PTA grant programs and awards. The constituent association will be sent an electronic communication regarding the lapse of insurance coverage and non-compliance. Further non-compliance issues such as not submitting membership dues and/or member list, not having a current officer's list, not completing an IRS annual tax filing; not submitting new or amended standing rules, will result in the suspension of the local PTA/PTSA unit or PTA Council. The constituent association will be sent an electronic communication regarding non-compliance with the "Standards of Affiliation". If the non-compliance matters are not addressed promptly, by Arizona PTA's dates for resolution, Arizona PTA will bring forward the non-compliant constituent association to the Arizona PTA Executive Committee for the revocation of their charter. The Arizona PTA Board of Managers then will ratify the revocation voted on by the Arizona PTA Executive Committee.

	Local PTA/PTSA Unit or PTA Council Name: <hr/>	PRESIDENT'S INITIALS	TREASURER'S INITIALS
1.	Adhere to the PTA Mission, purposes, principles and organizational requirements.		
2.	Officers' List: Submit an annual officers list with the names and contact information for newly elected and/or continuing PTA/PTSA unit officers by June 30 or within ten (10) days of the election . When a vacancy or resignation occurs or if there's any change of officers or information an updated officer's list must be submitted. UNIFIED LOCAL PTA/PTSA UNIT BYLAWS do not allow for co-officers.		
3.	Membership Dues/List: Remit monthly membership dues by the 30th of each month. Enter your membership data (roster) and submit your membership payments using the MemberHub platform. The first submission (a minimum of 10 members) is due no later than September 30th annually.		
4.	Insurance: Remit the annual Insurance premium to AIM Insurance via the Arizona PTA website, in the amount of \$165.00 no later than June 30th annually . A late fee of \$25.00 will be assessed for payments received after the deadline of August 15 . AIM Insurance has no grace period for a lapsed, past due insurance premium. All policy coverages end August 31st annually.		
5.	Internal Revenue Service Tax Filing/ Regulations: Submit the appropriate IRS tax filing form 990, 990 EZ or 990-N E-filing, by the November 15th due date annually. Send a copy to Arizona PTA. If an extension filing is needed, submit a copy of the filed extension form and again when filing is completed a copy of IRS filing to Arizona PTA; and comply with all IRS regulations for 501 (c) (3) tax-exempt nonprofit associations. Utilize the file990.org email reminder link.		
6.	Financial Review/ Professional Audit: Submit a copy of the completed annual PTA Financial Review/ professional audit packet, Bank Statement ending June 30, final treasurer's report and official general membership meeting minutes expressing approval by September 30th annually .		

	Local PTA/PTSA Unit or PTA Council Name: <hr/>	PRESIDENT'S INITIALS	TREASURER'S INITIALS
7.	Budget: Submit a copy of the current year local PTA/PTSA unit budget, approved by the general membership, with the minutes expressing the general membership approval to Arizona PTA no later than September 30th annually.		
8.	Leadership Training: Local PTA/PTSA unit and Council PTA officers must receive approved training annually by September 30th , and must arrange training within 45 days of taking office with their specified Region Director if elected to fill a vacancy.		
9.	Bylaws: Present to the general membership and adopt annually the current version of the UNIFIED LOCAL PTA/PTSA UNIT BYLAWS according to the procedures of Arizona PTA. Submit the general meeting minutes expressing the general membership adoption of the bylaws no later than September 30th annually.		
10.	Standing Rules: Appoint a committee annually to review your local PTA/PTSA unit standing rules. Submit the official meeting minutes expressing the adoption of the entire standing rules document with amendments and the Standing Rules document annually by September 30		
11.	Arizona Corporation Commission: Upon receipt of the Local PTA/PTSA unit Officers List, when applicable, the Arizona PTA is named as the Statutory Agent for each of its local PTA/PTSA units. Arizona PTA will monitor individual local PTA/PTSA units renewal date. Arizona PTA is authorized to file the annual report on behalf of the local PTA/PTSA unit. Local PTA/PTSA unit will submit filing fee to the Arizona PTA.		



Arizona PTA Standards of Affiliation for Constituent Associations Local PTA/ PTSA Units and PTA Councils

We, the undersigned officers of the _____ PTA/PTSA, located in the _____ Region, have reviewed this document and are aware of the expectations set upon us as local unit officers.

President's Name (Please Print): _____

President's Signature: _____

Date: _____ 20 _____.

(First) Vice President's Name (Please Print): _____

(First) Vice President's Signature: _____

Date: _____ 20 _____.

Secretary's Name (Please Print): _____

Secretary's Signature: _____

Date: _____ 20 _____.

Treasurer's Name (Please Print): _____

Treasurer's Signature: _____

Date: _____ 20 _____.

Please keep a copy of this document for your records and submit this initialed and signed Arizona PTA Standards of Affiliation for Constituent Associations Local PTA/ PTSA Units and PTA Councils agreement to your Region Director or assigned Field Services Chair/Representative.

Benefits for Constituent Associations of Compliance with “Standards of Affiliation”

1. Arizona PTA Website: www.azpta.org Visit it, look for PTA, Programs information, Local Leader Resources, Forms, Advocacy ideas, and Events, such as the Arizona PTA annual Convention. In addition, information is shared by Arizona PTA on social media sites such as Facebook.
2. Arizona PTA online submission for: Officer’s List, AIM Insurance policy agreement (select/deny terrorism coverage, select/deny business personal property coverage, select additional medical coverage) and submit payment to Arizona PTA; membership dues payment and local unit membership list.
3. A “Good Standing” Unit may apply for Arizona PTA and National PTA program grants.
4. A “Good Standing” Unit may apply for Arizona PTA Awards including Teacher of the Year, Local Unit of the Year, the Sunflower Award and more. A “Good Standing” Unit may also submit student entries to Arizona PTA for the Reflections program. Training is available to “Good Standing” Units to help protect and limit risks, as well as maintaining 501 (c) (3) Tax-exempt nonprofit status.
5. Arizona PTA Membership Awards are given in recognition of Local PTA Units with successful membership initiatives.
6. Access to additional training that helps ensure the Local PTA/PTSA or PTA Council is in compliance with AIM Insurance requirements.
7. Arizona PTA updates sent electronically to PTA/PTSA officers, as listed on the PTA/PTSA Unit Officer’s list. Password protected access to Arizona PTA proprietary documents: UNIFIED LOCAL PTA/PTSA UNIT BYLAWS; AIM Local Unit Insurance Guide; Nominations and Elections Guide; W-9 Sample Form; Department of Treasury Group Exemption Letter; “Standards of Affiliation compliance document; Financial Review/Professional Audit packet; Local Unit Standing Rules template. National PTA’s “Back to School” kit for PTA/PTSA Units in “Good Standing”, contains the President’s, Finance, Programs, and Membership guides as well as other materials.
8. National PTA Website: www.pta.org Visit it for resources on Healthy Lifestyles, Advocacy, Our Children publication(s) (Spanish Version), National PTA School of Excellence program.
9. National PTA has a signup on the website www.pta.org for the Take Action alerts, Advocacy News / Blog covering federal legislative issues.
10. Support and guidance for Local PTA/PTSAs and PTA Councils from Arizona PTA Region Directors, Vice-President, Vice-President of Membership and Chairmen such as: Field Services, Arts in Education, Diversity, Bylaws, and Health and Safety for your executive board and general membership. Ability for Local PTA/PTSA units and PTA Councils and members to submit resolutions for consideration by Arizona PTA.

**Benefits for Constituent Associations of Compliance with
“Standards of Affiliation” continued**

11. Ability for Local PTA/PTSA units to submit recommended amendments for the UNIFIED LOCAL PTA/PTSA UNIT BYLAWS and the Arizona PTA Bylaws for consideration to Arizona PTA.
12. Ability for Local PTA/PTSA units and PTA Councils to submit paid PTA/PTSA members that meet bylaws credentials for nomination for election as potential Arizona PTA elected officers or committee chairs.
13. Use of the official registered trademark for PTA and PTSA and the PTA tag line through the National PTA Visual Standards for use with your legal PTA/PTSA Unit name.
14. A “Good Standing” Units and its members, meeting the March 1st deadline for dues payment received by Arizona PTA, have the ability to pay member registration rates for the annual Arizona PTA convention. Accredited voting delegate status for four elected officers or their designated alternates and one additional member for every fifty (50) general members shall be allowed for the Arizona PTA convention (contingent upon Arizona PTA established criteria).
15. On behalf of Arizona PTA members, the children and youth of Arizona, an Arizona PTA spokesperson informs, speaks and advocates based on the current Arizona PTA Legislative Platform Priorities, Resolutions, and Position Statements with state legislators, state agencies, ABC (education) organizations, business groups, and PTA constituent associations.
16. A “Good Standing” Unit and their paid members have the ability to register for the National PTA convention at member rates.
17. Members have the ability to request accredited Voting Delegate status for the National PTA Annual convention from the Arizona PTA President.
18. An Arizona PTA spokesperson and the Advocacy and Legislative Issue Chair speak, inform and advocate with Federal legislators and their assistants regarding the current adopted National PTA Public Policy Agenda.
19. Use of affiliate organizations to help promote ease of work for local PTA/PTSA units, such as , MemberHub, file990.org, AIM Insurance, and VoterVoice