

WSPTA Standards of Affiliation Agreement Checklist 2019 - 2020

Everett PTSA
Council 7.3

The Standards of Affiliation (SOA) Agreement Checklist exists to help local PTAs and councils remain current with all IRS, state, insurance, and PTA requirements. For assistance with this checklist or help understanding any of the SOA agreement requirements, please contact council leaders (if applicable) or a region director. Additional resources are on the WSPTA website (www.wastatepta.org/pta-leaders/governance/). Please share this checklist with your board of directors and membership.

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.	President J.H.	3/27/19
	2.	Corporate renewal filed	Current	File by annual corporate renewal date (end of the month your PTA incorporated).	Treasurer	
	3.	Charitable solicitations filed	Prior	<p>OPTION 1: More than \$50,000 in gross receipts - required to file by May 31.</p> <p>OPTION 2: Not required to file - will file/update the optional filing.</p> <p>OPTION 3: Not required to file - choose not to do the optional filing.</p> <p>*Once an account is created with the Secretary of State, it must be maintained yearly.</p>	Treasurer	
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).	Treasurer	
	5.	Form 8822-B updated	Current	File Form 8822-B when the PTA's mailing address changes or the identity of the "responsible party" as listed on the IRS Form 990 changes (usually the president or treasurer). Form requires a personal social security number.	President	9/5/19
Insurance	6.	Year-end financial review	Prior	Year-end financial review was conducted (recommended by August 31).	Treasurer	7/19/19
WSPTA-Local PTAs & Councils (Also: uphold the ethics, policies, and principles of PTA and not conflict with adopted WSPTA or NPTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA)	7.	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)	President	May 2019
	8.	Budget approved	Current	Budget was approved by the membership (recommended before previous fiscal year-end).	President	5/29/19
	9.	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).	President	
	10.	Insurance	Current	Evaluate and purchase appropriate insurance (prior to November 30 to prevent lapse in coverage).	Treasurer	
WSPTA-Local PTAs only	11.	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.	BoD	
	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 June 30.	N/A	N/A
WSPTA-Councils only	13.	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.	N/A	N/A
	14.	Council Reflections program	Current	Offer a Reflections program for your local PTAs.	Reflections E.H. & V.D.	

Per the *WSPTA Uniform Bylaws*, a local PTA or council in good standing is one that meets the criteria in the SOA agreement. While this checklist is for your internal monitoring purposes and does not need to be turned in to WSPTA (unless you are selected for periodic review), your local PTA or council is responsible for completing all SOA requirements.