

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

**Purpose and Scope:** Arizona PTA’s Articles of Incorporation, Restated February 2009, contain a provision which says the affairs of the organization (Arizona PTA) include “to serve as a non-profit association of local Parent Teacher Congress Units throughout the State of Arizona.” The provision authorizes Arizona PTA to Charter local PTA/PTSA units and PTA Councils. The Charter creates a contract between the constituent associations, the local PTA/PTSA Unit(s) and the PTA Council(s) and Arizona PTA. Arizona PTA requires all constituent associations to adhere to the regulations, rules, criteria set by Arizona PTA, and the state PTA has the authority and procedures to address issues with constituent associations that do not adhere to the “Standards of Affiliation” for a local PTA/PTSA unit or for a PTA Council in “Good Standing.” This includes the authority to revoke the Charter.

**Compliance Standards of Affiliation for Arizona PTA constituent associations:**

**The local PTA unit President and Treasurer will initial to signify understanding.**

**Initials**

- |   |              |
|---|--------------|
| <p>1. <b>Adhere to the PTA</b> Mission, purposes, principles and organizational requirements; and</p>   | <p>_____</p> |
| <p>2. <b>Officers’ List:</b> Submit and annual officers list with the names and contact information for newly elected and/or continuing PTA officers <b>within ten (10) days of the election.</b> When a vacancy or resignation occurs, and with any change of officer; and</p>   | <p>_____</p> |
| <p>3. <b>Membership Dues/List: Remit monthly</b> membership dues, use the membership remittance form, and submit your membership list to Arizona PTA <u>on a monthly basis.</u> The first submission is <b>due no later than September 30<sup>th</sup> annually;</b> and</p>  | <p>_____</p> |
| <p>4. <b>Insurance:</b> Remit the annual Insurance premium <b>made out to Arizona PTA,</b> in the amount of <b>\$165.00 no later than June 30<sup>th</sup> annually.</b> AIM Insurance has no grace period for a lapsed, past due insurance premium. <u>All policy coverages end August 31<sup>st</sup> annually;</u> and.</p>  | <p>_____</p> |
| <p>5. <b>Internal Revenue Service Tax Filing/ Regulations:</b> Submit the appropriate IRS tax filing-form 990, 990 EZ or 990-N E-filing, <b>by the November 15<sup>th</sup> Annually.</b> <u>Send a copy to Arizona PTA.</u> If an extension filing is needed, <u>submit a copy of the filed form</u> and again when filing is completed <b>a copy of IRS filing</b> to Arizona PTA; and comply with all IRS regulations for 501 (c) (3) tax-exempt nonprofit associations; and</p> | <p>_____</p> |
| <p>6. <b>Financial Review/ Professional Audit:</b> Submit a copy of the completed annual PTA financial Review/ professional audit packet and final treasurer’s report and official general membership meeting minutes expressing approval <b>by September 30<sup>th</sup> annually;</b> and.</p>  | <p>_____</p> |
| <p>7. <b>Budget:</b> Submit a copy of the current year local PTA or PTA Council budget, approved by the general membership, with the minutes expressing the general membership approval to Arizona PTA no later than September 30<sup>th</sup> annually; and.</p>   | <p>_____</p> |
| <p>8. <b>Leadership Training:</b> Local PTA/Council PTA officers must attend approved training <b>every year by September 30<sup>th</sup>,</b> and must arrange <u>training within 45 days of taking office</u> with their specified Region Director; and</p>   | <p>_____</p> |
| <p>9. <b>Bylaws:</b> Present to General Membership and Ratify annually the current version of the Unified Local PTA Unit bylaws that were adopted at State Convention, according to the procedures of Arizona PTA. A committee maybe formed to review and submit suggestions. Submit the official meeting minutes expressing the general membership ratification <b>no later than September 30<sup>th</sup> annually.</b></p>   | <p>_____</p> |
| <p>10. <b>Standing Rules:</b> Appoint a committee annually to review the constituent association Standing rules. Present the proposed amendments to the standing rules at a General Membership meeting for approval by the General Membership <b>no later than September 30<sup>th</sup> Annually.</b> Submit the official meeting minutes expressing the adoption of the entire standing rules document with amendments: and</p>   | <p>_____</p> |

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**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" for "Good Standing". Non-compliance for the non-payment of mandated Insurance policy premium will result in Suspending the Local PTA/PTSA unit or PTA Council. This includes removal from 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 for: submitting membership dues and/or list, current officer's list, the prompt IRS annual tax filing; non-submission of 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 revocation of the Charter. The board of managers will ratify the revocation. \_\_\_\_\_

**Local Unit or PTA Council Name:** \_\_\_\_\_; **Region:** \_\_\_\_\_.

President's Name, print: \_\_\_\_\_; Date: \_\_\_\_\_ 20 \_\_\_\_\_.

President's Signature: \_\_\_\_\_.

Treasurer's Name, print: \_\_\_\_\_; Date: \_\_\_\_\_ 20 \_\_\_\_\_.

Treasurer's Signature: \_\_\_\_\_.

\*\*Please keep a copy for your Records and Submit the initialed and signed "Standards of Affiliation" agreement.

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

1. Arizona PTA Website: [www.azpta.org](http://www.azpta.org) Visit, scroll across dashboard for Why PTA, Programs, Members – Local Leader Resources, Forms, Advocacy, Events, Annual Convention and Tweets.
2. Arizona PTA On-Line 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. “Good Standing” Unit applications for Arizona PTA and National PTA program grants, such as the Arizona’s Teacher of the Month, the Healthy Lifestyles grant, and Reflections Program.
4. “Good Standing” Unit applications for Arizona PTA Awards programs, such as Family Engagement Local Unit event, Support Staff of the Year, Super Man Award and the state level Reflections Program.
5. Training that helps protect and limit risks, maintain 501 (c) (3) Tax-Exempt nonprofit status.
6. Arizona PTA Membership Awards Recognition for Local PTA Units with successful membership initiatives.
7. Access to training that helps ensure the Local PTA or PTA Council is in compliance with AIM Insurance requirements.
8. Arizona PTA E-News/ Weekend Updates sent electronically for PTA Officers, as submitted on Unit Officer’s list.
9. Password Protected Access to Arizona PTA Proprietary Documents: Unified Local PTA/PTSA Unit current 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; Budget Planning packet; Financial Review/Professional Audit packet; Template Local Unit Standing Rules or Fill in Version.
10. Reflections Program – National PTA Celebrating 50<sup>th</sup> Anniversary, Arizona PTA Units may participate in the Program on the state PTA level for nominees to be forwarded onto National PTA.
11. National PTA’s “Back to School” kit for PTA Units in “Good Standing”, contains the President’s, Finance, Programs, and Membership guides and materials.
12. National PTA Website: [www.pta.org](http://www.pta.org) Visit for resources on Healthy Lifestyles, Advocacy, Our Children publication(s) (Spanish Version), National PTA School of Excellence program.
13. National PTA sign up on the Website [www.pta.org](http://www.pta.org) for the Take Action alerts, Advocacy News/ Blog covering federal legislative issues.
14. Support and guidance for Local PTAs and PTA Councils from Arizona PTA Region Directors, Vice-President, and Chairmen such as: field service, membership, arts in education, diversity, parent engagement/involvement, bylaws, and health and safety for your executive board and general membership.
15. Ability for Local PTA Units and PTA Councils to Submit Resolutions for consideration by Arizona PTA.
16. Ability for Local PTA Units to submit recommended amendments for the Unified local PTA/PTSA Unit bylaws and the Arizona PTA bylaws for consideration to Arizona PTA.
17. Ability for Local PTA Units and PTA Councils to Submit paid PTA members that meet bylaws credentials for Nomination for Arizona PTA elected officers and open committee chair positions.
18. Use of the official registered trade mark for PTA and PTSA and the PTA Tag Line through the National PTA Visual Standards for use with your Legal PTA Unit Name.
19. “Good Standing” Local PTA/PTSA Units and PTA members, meeting the March 1<sup>st</sup> deadline for dues payment into the state, have ability to pay Member Registration rates. Accredited voting delegate status for four elected officers or their designated alternates and one additional member for every fifty (50) general members for attendance at state convention (contingent upon Arizona PTA established criteria).
20. On Behalf of Arizona PTA members, the children and youth of Arizona, the State PTA Spokesperson informs, speaks and advocates based on the current Legislative Platform Priorities, Resolutions, and Position Statements with state legislators, state agencies, ABC organizations, and business groups, and PTA constituent associations.
21. “Good Standing” Local PTA/ PTSA Units and their paid members have the ability to Register for National PTA Convention at member rates.
22. Ability to Request Accredited Voting Delegate Status for the National PTA Annual Convention from the Arizona PTA President.
23. Arizona PTA spokesperson and the federal legislative chair speak, inform and advocate with U. S. Senators and Congressmen/ women and their legislative assistants regarding the current adopted National PTA Public Policy Agenda.

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