

1. What is the purpose of the WSPTA Standards of Affiliation agreement (SOA)?

Washington State PTA (WSPTA) is providing 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 and to keep your membership up to date with your progress.

The SOA agreement is in place to ensure local PTAs and councils align with WSPTA's ethics, policies, and principles; maintain good business practices; and comply with applicable federal and state laws. WSPTA has a similar SOA requirement with National PTA.

2. What are the benefits of the SOA?

The SOA has multiple benefits to local PTAs and councils:

- Clarifies what requirements define a local PTA or council in good standing.
- All requirements are in one place – no need to check multiple resources to know what is expected.
- Consistent expectations across the state.
- Helps local PTAs and councils stay on track with legal requirements.
- Allows for improved service and support from all levels of PTA.

3. What changed this year?

There is new information regarding IRS Form 8822-B, Change of Address or Responsible Party – Business. For security reasons, the IRS now requires that the responsible party (a primary officer – usually the president or treasurer) provide a personal social security number, along with their name and contact information. When the responsible party changes, the PTA has 60 days to update this required form with the IRS.

4. At my local PTA or council, who is responsible for the SOA?

We recommend the SOA agreement checklist be reviewed by the board of directors, reported to the membership, and recorded in the meeting minutes. Keep copies of this checklist and all pertinent documentation with your legal or financial documents.

5. What is the deadline?

There is no deadline for completion of the agreement checklist. Most requirements have their own deadlines or best practice timeframes, and everything should be completed by the end of the fiscal year. It is up to your board of directors to monitor the progress towards completion and be able to present the required documentation, if requested, for periodic review.

6. How do we submit our completed SOA checklist?

No need to submit the checklist! We recommend you keep a copy of the checklist and copies of all pertinent documentation in your legal documents or treasurer binder.

7. What are the requirements of the SOA?

The SOA is made up of requirements from the IRS, State of Washington, your insurance company, and Washington State PTA. There are 13 requirements for local PTAs and 12 for councils. Please refer to the checklist for the specific requirements.

8. What is the annual training requirement?

The training requirement remains the same:

- At least one elected officer must attend PTA and the Law, and all other elected officers must attend at least one WSPTA-approved training before this year's WSPTA convention.
- Training received at or after the WSPTA convention shall be counted toward the training requirement for the PTA year following convention.
- A person who attends a WSPTA-approved training and is an elected officer of two or more PTAs shall have fulfilled the training requirement for all positions held.
- **All elected officers shall maintain documentation they satisfied the training requirement.**

9. What is "participation eligibility"?

Specific SOA requirements may be verified by the WSPTA staff or executive committee throughout the year 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 approved waiver) the prior fiscal year. Enroll at least 25 members for the current fiscal year no later than June 30. (IF ASKED - Many programs will occur prior to June 30. If a local PTA does not have 25 members for the current year, they will be reminded of that requirement or may forfeit their grant/award level/ability to participate.)
- Membership invoices paid: Membership invoices paid in full for the previous fiscal year. Payment of current **fiscal year membership invoices shall be current.**

10. What are the benefits of being a local PTA or council “in good standing”?

The benefits of being in good standing include:

- Support of WSPTA staff, region service delivery team, council (if applicable).
- WSPTA resources (training, website, leadership guides, assistance with the IRS and state of Washington as needed, and much more!)
- Membership benefit programs (e.g. Great Wolf Lodge, Silverwood, Wild Waves, FedEx Office, movie license discount, etc.)
- Participation in WSPTA awards and programs such as Standards of Excellence, Outstanding Website, Outstanding PTA of the year, and more awards. It also allows you to participate in Reflections at the national level (we cannot move your entries forward to the national level if you are not in good standing as they will be disqualified by National PTA).
- Eligibility for grants and program participation funds (e.g. National PTA Mary Lou Anderson grants, WSPTA scholarships, etc.)
- Access to membership database and an online membership join portal for collection of dues electronically.
- Opportunity to send delegates to convention and legislative assembly.
- Right to bring issues and resolutions forward for consideration.
- Use of National PTA and WSPTA logos.

11. Do we need to add the SOA to our local PTA or council standing rules?

Yes! The suggested wording is as follows:

Per the Washington State PTA Uniform Bylaws, we will annually review the Washington State PTA Standards of Affiliation agreement in its entirety and we agree to abide by all requirements and to uphold the ethics, policies, and principles of PTA.

12. What if we are not in compliance with the SOA?

The intent of the SOA is to help local PTAs and councils succeed! There are multiple steps of support to help your PTA come back into compliance.

13. Who can answer additional questions about the SOA?

If you need assistance with this checklist, help understanding any of the SOA agreement requirements, or find that a requirement was not completed the previous year, please contact your council (if applicable) or region director. Additional SOA resources are on the website (www.wastatepta.org/pta-leaders/governance/). We are here to help!

Please refer to www.wastatepta.org and refer to the “regions” tab for your region director’s name and contact information.