

# Adopted WSPTA Policy Amendments

## Effective November 2025

[WSPTA Policy](#) governs and guides the WSPTA board of directors and the WSPTA membership. The WSPTA board of directors owns the WSPTA policies and is charged with revising and updating them to reflect current business practices. The policies address how business is done but allow for some flexibility and nimbleness to address opportunities that may arise.

*Section Three: Local PTAs and Councils* of WSPTA Policy should be used as a resource by all local PTAs and councils in developing their own policies and procedures that align with the requirements to run an effective PTA. This section explains the standards of affiliation requirements, defines information regarding local PTA membership, considerations on membership dues, function of councils, information about electronic financial transactions, details for elections, procedures for financial reviews, board duties and meetings, explanation about WSPTA resources available, volunteer recognition options, and more.

This document is provided as a service to local PTAs and councils to allow for a quick way to highlight amendments made to WSPTA policy as they occur throughout the year. This will allow for a complete update of the WSPTA Policy document to occur less frequently.

This document lays out in detail each amendment to policy, the rationale for the change and whether the amendment will have a direct effect on local PTAs and councils.

### **Adopted Policy Amendments**

[1 - Policy 4.1.2: Region Director Terms](#)

[2 - Policy 6.1: WSPTA Committee Chairs - One Year Appointment](#)

[3 - Policy 6.14.3: Convention Planning Committee](#)

[4 - Policy 8.4.5: Legislative Assembly and Convention Expenses](#)

[5 - Policy 11.3.2: Update Delegates for National PTA Legislative Conference](#)

[6 - Policy Appendix I: Updates to Document Retention Recommendations](#)

[7 – Policy 10.6: Expand Digital Platforms and Allow WSPTA Representatives to Create and Moderate Accounts](#)

[8 – Policy 10.11: Update to Expand Digital Platforms Allowed and Clarify Moderation](#)

<b>Policy Amendment #1</b>	<b>Region Director Terms</b>
Policy Section	Section 4: Regions, 4.1.2 Region Directors, first paragraph
Original Language	Region directors shall be appointed as detailed in the <i>WSPTA Uniform Bylaws</i> . The field service directors shall appoint a region director for a one-year term. Region directors shall assume their duties on June 1.
Adopted Amendment	Region directors shall be appointed as detailed in the <i>WSPTA Uniform Bylaws</i> . The field service directors shall appoint a region director for a one-year term. Region directors shall assume their duties on <del>June</del> <b>July 1</b> .
Rationale	This amendment allows for more time for volunteers to transition into the region director role, especially when looking for support in a WSPTA board of directors turnover year where new board member terms begin on June 1. It also allows a region director to be in service throughout the local PTA and council fiscal year to assist with important year-end tasks like transition support and elections.
Group(s) Affected	WSPTA
<b>Policy Amendment #2</b>	<b>WSPTA Committee Chairs - One Year Appointment</b>
Policy Section	Section 6: WSPTA Areas of Service and Related Committees, 6.1 General, bullet point #1
Original Language	1. Except where noted, committee chairs shall be appointed by the WSPTA president with the approval of the executive committee.
Adopted Amendment	1. Except where noted, committee chairs shall be appointed <b>for a one-year term</b> by the WSPTA president with the approval of the executive committee.
Rationale	This has been inserted to make it clear and codify that all WSPTA committee chairs are appointed for a one-year term, unless otherwise noted. Instead of adding a sentence into each committee section in policy, it was added here in the General section to cover all committees.
Group(s) Affected	WSPTA
<b>Policy Amendment #3</b>	<b>Convention Planning Committee</b>
Policy Section	Section 6: WSPTA Areas of Service and Related Committees, 6.14 WSPTA Leadership, 6.14.3 WSPTA Convention Planning Committee, first paragraph
Original Language	The purpose of the WSPTA convention planning committee is to plan and coordinate the volunteer workers and their activities for the annual WSPTA convention. The leadership director may appoint a chair for the committee, with the approval of the executive committee, or may chair the committee themselves. Members of the committee shall include all convention sub-committee chairs and the WSPTA leadership director. Other members shall be approved by the WSPTA president. This committee works closely with the leadership committee and staff in executing all components of the annual WSPTA convention.
Adopted Amendment	The purpose of the WSPTA convention planning committee is to plan and coordinate the volunteer workers and their activities for the annual WSPTA convention. <b>Each year, the leadership director president</b> may appoint a chair for the committee, with the approval of the executive committee, <del>or may chair the committee themselves</del> . Members of the committee shall include all convention sub-committee chairs and the WSPTA leadership director. Other members shall be approved by the WSPTA president. This committee works closely with the leadership committee and staff in executing all components of the annual WSPTA convention. <b>The WSPTA president shall provide oversight and serve as the convention planning committee's liaison to the WSPTA board of directors.</b>

Rationale	This amendment makes the convention planning committee a stand-alone committee for this specific event. It removes the responsibility of the leadership director to have to chair or appoint a chair for this committee, while maintaining their presence on the planning committee.																																																																																			
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Policy Amendment #4	Legislative Assembly and Convention Expenses																																																																																			
Policy Section	Section 8: WSPTA Financial, 8.4 WSPTA Reimbursement, 8.4.5 WSPTA Events																																																																																			
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Adopted Amendment	<table><tr><td></td><td>August Leadership Launch (remote only)</td><td>Legislative Assembly (remote or in person)</td><td>Convention with no Annual Business Meeting (remote or in person)</td><td>Convention Including Annual Business Meeting (remote or in person)</td><td>Annual Business Meeting as a Stand Alone (remote only)</td></tr><tr><td rowspan="4">Expenses provided per policy 8.4</td><td></td><td>Necessary Staff</td><td>Necessary Staff</td><td>Necessary Staff</td><td></td></tr><tr><td></td><td>Legislative Assembly Planning Chair</td><td>Convention Planning Chair</td><td>Convention Planning Chair</td><td></td></tr><tr><td></td><td>Region Advocacy Chairs</td><td rowspan="2">Others Pre-Approved by CFC or President within approved budget</td><td>Resolutions Chair</td><td></td></tr><tr><td></td><td>Resolutions Chair</td><td>Others Pre-Approved by CFC or President within approved budget</td><td></td></tr><tr><td rowspan="6">Only Lodging (provided per policy 8.4) and Parking for Duration of Event</td><td></td><td>Federal Legislative Chair</td><td>Convention Planning Chair</td><td>Election Oversight Chair</td><td></td></tr><tr><td></td><td></td><td>Scholarship Basket Chair</td><td>Scholarship Basket Chair</td><td></td></tr><tr><td></td><td></td><td>Reflections Chair</td><td>Reflections Chair</td><td></td></tr><tr><td></td><td></td><td></td><td>Nominating Committee Chair</td><td></td></tr><tr><td></td><td></td><td></td><td>Governance Chair</td><td></td></tr><tr><td></td><td></td><td></td><td>Convention &amp; Annual Business Meeting Planning Chair</td><td></td></tr><tr><td rowspan="4">Complimentary Audience Registration (non-voting)</td><td>Past WSPTA Presidents</td><td>Past WSPTA Presidents</td><td>Past WSPTA Presidents</td><td>Past WSPTA Presidents</td><td>Past WSPTA Presidents</td></tr><tr><td></td><td>Resolutions Chair</td><td>Reflections Chair</td><td>Resolutions Chair</td><td>Governance Chair</td></tr><tr><td></td><td>Federal Legislative Chair</td><td>Scholarship Basket Chair</td><td>Scholarship Basket Chair</td><td>Nominating Committee Chair</td></tr><tr><td></td><td>Legislative</td><td>Convention</td><td>Nominating</td><td>Elections</td></tr></table>							August Leadership Launch (remote only)	Legislative Assembly (remote or in person)	Convention with no Annual Business Meeting (remote or in person)	Convention Including Annual Business Meeting (remote or in person)	Annual Business Meeting as a Stand Alone (remote only)	Expenses provided per policy 8.4		Necessary Staff	Necessary Staff	Necessary Staff			Legislative Assembly Planning Chair	Convention Planning Chair	Convention Planning Chair			Region Advocacy Chairs	Others Pre-Approved by CFC or President within approved budget	Resolutions Chair			Resolutions Chair	Others Pre-Approved by CFC or President within approved budget		Only Lodging (provided per policy 8.4) and Parking for Duration of Event		Federal Legislative Chair	Convention Planning Chair	Election Oversight Chair				Scholarship Basket Chair	Scholarship Basket Chair				Reflections Chair	Reflections Chair					Nominating Committee Chair					Governance Chair					Convention & Annual Business Meeting Planning Chair		Complimentary Audience Registration (non-voting)	Past WSPTA Presidents	Past WSPTA Presidents	Past WSPTA Presidents	Past WSPTA Presidents	Past WSPTA Presidents		Resolutions Chair	Reflections Chair	Resolutions Chair	Governance Chair		Federal Legislative Chair	Scholarship Basket Chair	Scholarship Basket Chair	Nominating Committee Chair		Legislative	Convention	Nominating	Elections
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Rationale	This amendment allows the WSPTA Legislative Assembly Planning Chair, Federal Legislative Chair and Convention Planning Chair to have expenses covered for attending the events that they worked hard to make happen and allows them to be present to attend to logistics and last-minute planning issues.																																																												
Group(s) Affected	WSPTA																																																												
Policy Amendment #5	Update Delegates for National PTA Legislative Conference																																																												
Policy Section	Section 11: National PTA, 11.3 Events, 11.3.2 National PTA Legislative Conference, first paragraph																																																												
Original Language	The delegates to the National PTA legislative conference shall be the WSPTA advocacy director and the WSPTA president. Alternate delegates may be selected by the executive committee if one or both of the named delegates are unable to attend. In addition, the WSPTA’s ability to send delegates is dependent on the budget in any given year. Additional delegates may attend at their own expense.																																																												
Adopted Amendment	The delegates to the National PTA legislative conference shall be the WSPTA <del>advocacy director</del> <b>federal legislative chair</b> and the WSPTA president. Alternate delegates may be selected by the executive committee if one or both of the named delegates are unable to attend. In addition, the WSPTA’s ability to send delegates is dependent on the budget in any given year. Additional delegates may attend at their own expense.																																																												

Rationale	This amendment fixes a discrepancy between Policy section 8.4.2 and 11.3.2. Section 8.4.2 states that expenses to Legislative Conference (LegCon) may be provided for the WSPTA president and federal legislative chair, if not reimbursed by National PTA. Section 11.3.2 states that WSPTA's delegates to LegCon will be the president and advocacy director. It is one of the federal legislative chair's duties to attend LegCon (Policy 6.11.4).
Group(s) Affected	WSPTA
<b>Policy Amendment #6</b>	<b>Updates to Document Retention Recommendations</b>
Policy Section	Appendix I: Document Retention and Destruction Policy, Three Years + Five Years + Permanent Sections
Original Language	<p><i>Three Years</i> • Insurance certificates • Financial and insurance matters • Job applications • Employee benefits • Attendance and time reports • Personnel files after termination • Payroll records after termination</p> <p><i>Five Years</i> • Washington State Department of Revenue filings</p> <p><i>Permanent</i> • Charts of accounts • Depreciation schedules • Financial statements • General ledgers • Inventory records • Conformed Articles of Incorporation/Amendments/Restatements • Certificate of Incorporation • Legal correspondence • Minutes (board &amp; membership meetings) • Outdated bylaws and policy manuals • PTA charter • Letter of determination of tax-exempt status from IRS • Letter assigning Employer Identification Number (EIN) • Correspondence with IRS • Forms 990/990EZ/990N and 990-T (to report unrelated business income, if applicable) with IRS • Membership/board roster • Completed Form 1023 or 1024 (application for tax exemption and all documents submitted as support) • Financial reviews • Award recipients • Select published documents as a historical archive, such as annual reports and annual meeting programs • Current employee files • External audit reports • Copyrights, trademarks, patents • Mortgages, licenses, deeds • Partnership agreements</p>
Adopted Amendment	<p><i>Three Years</i> • <del>Insurance certificates</del> • <del>Financial and insurance matters</del> <b>Insurance renewal records</b> • Job applications • Employee benefits • Attendance and time reports • Personnel files after termination • Payroll records after termination</p> <p><i>Five Years</i> • Washington State Department of Revenue filings • <b>Insurance claims and payouts</b></p> <p><i>Permanent</i> • <b>Insurance certificates</b> • Charts of accounts • Depreciation schedules • Financial statements • General ledgers • Inventory records • Conformed Articles of Incorporation/Amendments/Restatements • Certificate of Incorporation • Legal correspondence • Minutes (board &amp; membership meetings) • Outdated bylaws and policy manuals • PTA charter • Letter of determination of tax-exempt status from IRS • Letter assigning Employer Identification Number (EIN) • Correspondence with IRS • Forms 990/990EZ/990N and 990-T (to report unrelated business income, if applicable) with IRS • Membership/board roster • Completed Form 1023 or 1024 (application for tax exemption and all documents submitted as support) • Financial reviews • Award recipients • Select published documents as a historical archive, such as annual reports and annual meeting programs • Current employee files • External audit reports • Copyrights, trademarks, patents • Mortgages, licenses, deeds • Partnership agreements</p>
Rationale	This past year the <i>Records Retention</i> document was updated for local PTAs and councils. One of the big changes was how long it was recommended that insurance documents were kept. This update makes WSPTA policy match the recommendations to local PTAs and councils.
Group(s) Affected	WSPTA

Policy Amendment #7	Expand Digital Platforms and Allow WSPTA Representatives to Create and Moderate Accounts
Policy Section	Section 10: WSPTA Communication, 10.6 WSPTA Social Media Accounts
Original Language	<p>10.6 WSPTA Social Media Accounts</p> <p>In keeping with standard business practices for associations, the WSPTA shall maintain a presence on social media.</p> <p>The executive committee staff shall determine the platforms that shall be used, as long as it is within the budget. The board shall be informed and given an opportunity for feedback. The communications committee shall determine the needs of any platform including but not limited to: maintenance time, training to best utilize the medium, the reach to our members, the benefits to our members, and the return on investment both of any monetary cost and of time expended.</p> <p>WSPTA shall be the sole owner of any social media account and the board, as fiduciaries, are responsible for maintaining the integrity of the brand. The WSPTA staff shall be responsible for the creation of any WSPTA social media account. A WSPTA staff member or contractor shall be the equivalent of administrators on any platform and board members, region directors or committee members may have appropriate access to the account as needed.</p> <p>Any board member, region director, or committee member that may create a social media account for WSPTA use shall surrender the ownership of that account to WSPTA or be required to delete the account.</p>
Adopted Amendment	<p>10.6 WSPTA Social Media <b>and Cloud-Based Collaboration Application</b> Accounts</p> <p>In keeping with standard business practices for associations, the WSPTA shall maintain a presence on social media <b>and may utilize cloud-based collaboration applications.</b></p> <p>The executive committee staff shall determine the platforms that shall be used, as long as it is within the budget. The board shall be informed and given an opportunity for feedback. The communications committee shall determine the needs of any platform including but not limited to: maintenance time, training to best utilize the medium, the reach to our members, the benefits to our members, and the return on investment both of any monetary cost and of time expended.</p> <p>WSPTA shall be the sole owner of any <del>social media</del> account and the board, as fiduciaries, are responsible for maintaining the integrity of the brand. The WSPTA staff <b>or a WSPTA representative appointed by the president and approved by the executive committee</b> shall be responsible for the creation of any WSPTA <del>social media</del> account <b>on any approved platform.</b></p> <p>A WSPTA staff member, <del>or a contractor,</del> <b>or WSPTA representatives appointed by the president and approved by the executive committee</b> shall be the equivalent of administrators <b>or moderators</b> on any platform. <del>and B</del> Board members, region directors or committee members may have appropriate access to the account as needed.</p> <p>Any board member, region director, or committee member that <del>may create</del> <b>a social media or cloud-based collaboration application</b> account for WSPTA use, <b>whether the outlined processes have been followed or not,</b> shall surrender the ownership of that account to WSPTA or be required to delete the account, <b>upon request.</b></p>
Rationale	<p>Since WSPTA will be extending its back-and-forth digital communication options with the addition of a new interactive advocacy community, this section was updated.</p> <p>Over the past two years, WSPTA has moved away from staff solely managing the digital platforms and now have volunteers currently doing many of these tasks. This change updates language to allow for a WSPTA representative appointed by the president and approved by the executive committee to be able to create and manage accounts.</p>

	<p>The term “moderator” has been added as there are currently WSPTA representatives holding those titles on WSPTA social media groups.</p> <p>The last paragraph has been updated to make it clearer that any accounts created for the purpose of communicating on behalf of WSPTA are owned by WSPTA.</p>
Group(s) Affected	WSPTA
<b>Policy Amendment #8</b>	<b>Update to Expand Digital Platforms Allowed and Clarify Moderation</b>
Policy Section	Section 10: WSPTA Communication, 10.11 Membership Communications, bullet point #4
Original Language	4. Online discussion groups shall not be moderated but shall be monitored. These discussion groups may be established to address specific topics/issues or the needs of specific/special groups that are focused on WSPTA – its governance, management, operation, mission or goals. Participation in any discussion group may be limited. WSPTA board members shall be included in every discussion group.
Adopted Amendment	4. Online <b>collaboration and communication platforms, including but not limited to social media and cloud-based collaboration applications</b> , <del>discussion groups</del> shall not be moderated but shall be monitored by WSPTA representatives. <b>Accounts on these discussion groups platforms</b> may be established to address specific topics/issues or the needs of specific/special groups that are focused on WSPTA—its governance, management, operation, mission or goals. Participation in any <del>discussion group</del> <b>platform</b> may be limited. WSPTA board members shall be <b>invited to join all approved platforms included in every discussion group</b> .
Rationale	<p>Since WSPTA will be inviting members to participate in a new interactive advocacy community, this section has been updated to allow it to cover not only current social media and communication platforms but also any future platforms.</p> <p>“Online discussion group” is an outdated term.</p> <p>The original sentence regarding “moderate” vs “monitor” was confusing. On social media, the people that look over posts and content to weed out inappropriate/offensive content are called moderators – standard terminology. It was decided to use “moderate” because it is a known term and because it gives WSPTA representatives the power to step in to defuse a situation that might arise. The word “monitor” has a more passive viewing connotation.</p>
Group(s) Affected	WSPTA