

[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

NOVEMBER 2025 UPDATES

- [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](#)

FEBRUARY 2026 UPDATES

- [9 – Policy 3.3.2: Membership Dues Deadline Update – Conforming Edit](#)
- [10- Policy 3.3.1: \\$0 Membership Dues Clarification](#)
- [11- Policy 3.13: Prohibit AI at WSPTA Events](#)
- [12- Policy 3.18.3: Dissolution Guidance Updates](#)
- [13- Policy 5.1.1: Strategic Plan](#)
- [14- Policy 7.1.3: WSPTA Nominating Committee Deadlines](#)
- [15- Policy 7.1.4: WSPTA Nominating Committee Candidate Materials](#)
- [16- Policy 10.2: RSC & FSC Access to Givebacks](#)
- [17- Policy 10.5.1: WSPTA Newsletter Updates](#)
- [18- Policy 10.11: Update to Member Communications](#)

| | |
|----------------------------|--|
| Policy Amendment #1 | Region Director Terms |
| Policy Section | Section 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 June July 1 . |
| 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 |
| Policy Amendment #2 | WSPTA Committee Chairs - One Year Appointment |
| Policy Section | Section 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 for a one-year term 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 |
| Policy Amendment #3 | Convention Planning Committee |
| Policy Section | Section 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. Each year, the leadership director president 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. The WSPTA president shall provide oversight and serve as the convention planning committee's liaison to the WSPTA board of directors. |
| 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. |

| Group(s) Affected | WSPTA | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|--|--|----------------------------------|--|-----------------|-----------------|-----------------|--|--|-------------------------------------|---------------------------|---------------------------|--|--|------------------------|--|-------------------|--|--|-------------------|--|--|--|--|---------------------------|---------------------------|--------------------------|--|--|--|--------------------------|--------------------------|--|--|--|-------------------|-------------------|--|--|--|--|----------------------------|--|--|--|--|------------------|--|--|--|--|---|--|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--|-------------------|-------------------|-------------------|------------------|--|---------------------------|--------------------------|--------------------------|----------------------------|--|-------------|------------|------------|-----------|
| Policy Amendment #4 | Legislative Assembly and Convention Expenses | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Policy Section | Section 8.4.5 WSPTA Events | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Original Language | See chart in policy section 8.4.5 WSPTA Events | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Adopted Amendment | <table border="1"> <thead> <tr> <th></th> <th>August Leadership Launch (remote only)</th> <th>Legislative Assembly (remote or in person)</th> <th>Convention with no Annual Business Meeting (remote or in person)</th> <th>Convention Including Annual Business Meeting (remote or in person)</th> <th>Annual Business Meeting as a Stand Alone (remote only)</th> </tr> </thead> <tbody> <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 & Annual Business Meeting Planning Chair</td> <td></td> </tr> <tr> <td rowspan="4">Complimentary Audience Registration (non-voting)</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> </tbody> </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 | | Resolutions Chair | Reflections Chair | Resolutions Chair | Governance Chair | | Federal Legislative Chair | Scholarship Basket Chair | Scholarship Basket Chair | Nominating Committee Chair | | Legislative | Convention | Nominating | Elections |
| | 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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | 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) |
|---|--|--|--|--|--|
| | | Assembly Planning Chair | Planning Chair | Committee Chair | Oversight Chair |
| | | | | Elections Oversight Chair | Annual Business Meeting Planning Chair |
| | | | | Reflections Chair | Resolutions Chair |
| | | | | Governance Chair | |
| | | | | Convention & Annual Business Meeting Planning Chair | |
| Complimentary Delegate Registration | | Region Advocacy Chair | | | |
| Special Event Ticket | | | Convention Planning Chair | Convention & Annual Business Meeting Planning Chair | |
| | | | Past WSPTA Presidents | Past WSPTA Presidents | |
| | | | VIP Guests | VIP Guests | |
| Limited Access Registration: general sessions, candidate events | | | WSPTA Candidates | WSPTA Candidates | WSPTA Candidates |
| 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 11.3.2 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 advocacy director federal legislative chair 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 |
| Policy Amendment #6 | Updates to Document Retention Recommendations |
| 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 & 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> • Insurance certificates • Financial and insurance matters Insurance renewal records • 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 • Insurance claims and payouts</p> <p><i>Permanent</i> • Insurance certificates • Charts of accounts • Depreciation schedules • Financial statements • General ledgers • Inventory records • Conformed Articles of Incorporation/Amendments/Restatements • Certificate of Incorporation • Legal correspondence • Minutes (board & 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 10.6 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 and Cloud-Based Collaboration Application Accounts</p> <p>In keeping with standard business practices for associations, the WSPTA shall maintain a presence on social media and may utilize cloud-based collaboration applications.</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 or a WSPTA representative appointed by the president and approved by the executive committee shall be responsible for the creation of any WSPTA social media account on any approved platform.</p> <p>A WSPTA staff member, or a contractor, or WSPTA representatives appointed by the president and approved by the executive committee shall be the equivalent of administrators or moderators on any platform. and B 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 or cloud-based collaboration application account for WSPTA use, whether the outlined processes have been followed or not, shall surrender the ownership of that account to WSPTA or be required to delete the account, upon request.</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> |

| | |
|----------------------------|--|
| | 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. |
| Group(s) Affected | WSPTA |
| Policy Amendment #8 | Update to Expand Digital Platforms Allowed and Clarify Moderation |
| Policy Section | Section 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 collaboration and communication platforms, including but not limited to social media and cloud-based collaboration applications, discussion groups shall not be moderated but shall be monitored by WSPTA representatives. Accounts on these discussion groups platforms 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 platform may be limited. WSPTA board members shall be invited to join all approved platforms included in every discussion group. |
| Rationale | 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. “Online discussion group” is an outdated term. 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. |
| Group(s) Affected | WSPTA |
| Policy Amendment #9 | Membership Dues Deadline Update – Conforming Edit |
| Policy Section | Section 3.3.2 Local PTA Membership Dues Collection, second and third paragraph |
| Original Language | On the first of each month, if there is a balance due, local PTAs shall go into the membership database and “submit ACH” to make payment to WSPTA for both State and National PTA dues. Payment shall be made in full via ACH through the database on the 1st of each month. WSPTA and each local PTA must have a bank account associated with the database ACH system for processing dues payments. |
| Adopted Amendment | On the first At the end of each month, if there is a balance due, local PTAs shall go into the membership database and “submit ACH” to make payment to WSPTA for both State and National PTA dues. Payment shall be made in full via ACH through the database on the 1st by the end of each month. WSPTA and each local PTA must have a bank account associated with the database ACH system for processing dues payments. |
| Rationale | Policy was updated in August 2025 to have the deadline for membership dues be the end of month. This section needed to be updated to match that approved change. Local PTA SOA #13 (3.1.1) - "Membership dues paid in full for the previous fiscal year by June 30. Current fiscal year membership dues shall be paid at the end of the month in |

| | |
|-----------------------------|--|
| | which they were entered. Enter current fiscal year members within 30 days of member payment." |
| Group(s) Affected | Local PTAs |
| Policy Amendment #10 | \$0 Membership Dues Clarification |
| Policy Section | Section 3.3.1 Local PTA Membership Dues |
| Original Language | <p>WSPTA per capita membership dues shall be five dollars and seventy-five cents, and the National PTA per capita membership dues is two dollars and twenty-five cents. Increases to WSPTA membership dues shall be determined by the voting delegates during the annual meeting. National PTA assessment increases shall be automatic according to changes made by National PTA.</p> <p>Local PTA membership dues shall be listed in the local PTA standing rules, either as a specific amount or an "up to \$x" statement. The amount shall be at least the cost of the National PTA dues and WSPTA dues. The membership shall approve the current amount each year as part of approving the standing rules. Membership subsidies, if allowed, shall be listed in the local PTA standing rules.</p> <p>Local PTAs within the designated area of a council shall pay any council fees as stipulated in the council's standing rules. Per-member council fees may be charged as part of local PTA membership dues or may be paid from general funds.</p> |
| Adopted Amendment | <p>WSPTA per capita membership dues shall be five dollars and seventy-five cents \$5.75, and the National PTA per capita membership dues is two dollars and twenty-five cents \$3.25. Increases to WSPTA membership dues shall be determined by the voting delegates during the annual meeting. National PTA assessment increases shall be automatic according to changes made by National PTA.</p> <p>Local PTA membership dues shall be listed in the local PTA standing rules, either as a specific amount, including \$0, or an "up to \$x" statement. If the amount of dues for the local PTA is less than the combined amount for National and WSPTA dues, the local PTA shall be responsible for remitting that amount to National and WSPTA. The amount shall be at least the cost of the National PTA dues and WSPTA dues. The membership shall approve the current amount each year as part of approving the standing rules. Membership subsidies, if allowed, shall be listed in the local PTA standing rules.</p> <p>Local PTAs within the designated area of a council shall pay any council fees as stipulated in the council's standing rules. Per-member council fees may be charged as part of local PTA membership dues or may be paid from general funds.</p> |
| Rationale | Updated to reflect that some local PTAs provide memberships at no cost to members and pay dues to WSPTA and National PTA from their general fund. |
| Group(s) Affected | Local PTAs who choose to offer memberships at no cost and pay dues to WSPTA and National PTA. |
| Policy Amendment #11 | Prohibit AI at WSPTA Events |
| Policy Section | Section 3.13 WSPTA Events, bullet point #6 and #7 |
| Original Language | <p>6. All cell phones or other noise-producing devices must be put on vibrate only or silent mode during all general sessions, workshops, panels, and classes.</p> <p>7. All video and/or live streaming during general sessions is prohibited unless pre-approved by the chair.</p> |
| Adopted Amendment | <p>6. All cell phones or other noise-producing devices must be put on vibrate only or silent mode during all general sessions, workshops, panels, and classes.</p> <p>7. All video recording and/or live streaming as well as the use of any AI notetaking, transcription or meeting assistant tools during general sessions, workshops, panels,</p> |

| | |
|-----------------------------|--|
| | and classes is prohibited unless pre-approved by the chair president. Exceptions to AI services will be evaluated on a case-by-case basis, including but not limited to the content of the event taking place, the potential benefits of using an AI tool and accessibility-related issues. |
| Rationale | Some personal AI transcription/meeting assistant/notetaking services upload content to third party apps that may publish content publicly unbeknownst to the organization hosting the meeting(s). To protect against this happening, WSPTA added language prohibiting the use of these tools. |
| Group(s) Affected | Attendees of WSPTA event general sessions, workshops, panels and classes |
| Policy Amendment #12 | Dissolution Guidance Updates |
| Policy Section | Section 3.18.3 Dissolution of a Local PTA or Council |
| Original Language | Dissolution refers to a local PTA or council that ceases to exist as a parent group. For example, this may occur due to a school closure where the families are reassigned to another school that already has a PTA. Upon dissolution, the WSPTA shall remove the local PTA or council from the WSPTA website and mailing list, notify the insurance company and notify the Secretary of State's Charities Program and Corporations Division as well as the IRS. Specific steps shall be taken by a local PTA or council if it chooses to dissolve, as provided in the WSPTA Uniform Bylaws. |
| Adopted Amendment | Dissolution refers to a local PTA or council that ceases to exist as a parent group. For example, this may occur due to a school closure where the families are reassigned to another school that already has a PTA. WSPTA shall provide guidance on how to legally dissolve. Upon dissolution, the WSPTA shall remove the local PTA or council from the WSPTA website and mailing list, notify the insurance company and notify the Secretary of State's Charities Program and Corporations Division as well as the IRS. Specific steps shall be taken by a local PTA or council if it chooses to dissolve, as provided in the WSPTA Uniform Bylaws. |
| Rationale | Current policy states that WSPTA will notify the IRS, WA Secretary of State, and others that a PTA or council is dissolving. In most cases, WSPTA does not do this but instead provides instructions and assistance to the PTA or council on how to notify the agencies. This change would more accurately reflect the service that WSPTA provides. |
| Group(s) Affected | Local PTAs and councils |
| Policy Amendment #13 | Strategic Plan |
| Policy Section | Section 5.1.1 Responsibilities of Directors, subsection 2 |
| Original Language | 2. The WSPTA board of directors shall develop a strategic plan for the association which shall be reviewed and updated on a regular basis. |
| Adopted Amendment | 2. The WSPTA board of directors shall develop approve a strategic plan for the association which shall be reviewed and updated on a regular basis. |
| Rationale | Developing a strategic plan has been demonstrated to be a very big lift for the board and consumes a large amount of time in the limited number of meetings the board has – which would be compounded due to the change to not having an executive director. Trusted strategic plan sources indicate that it would be more effective and efficient to have the board approve a plan developed by a small team or task force dedicated specifically to its creation. |
| Group(s) Affected | WSPTA |
| Policy Amendment #14 | WSPTA Nominating Committee Deadlines |
| Policy Section | Section 7.1.3 WSPTA At-Large Members, first paragraph |

| | |
|----------------------|---|
| Original Language | The process for identifying candidates for the at-large positions is run separately from the nominating committee work. Qualified persons may not be nominated by someone else but shall self-declare candidacy by submitting a Declaration of Good Faith form to the WSPTA office by February 15 stating their intent to run and willingness to serve on the committee. The form is located on the WSPTA website. Upon receipt of the form, staff shall verify that the self-declared candidate is a current PTA member of 30 days standing and contact them to confirm their willingness to serve on the nominating committee. When the self-declared window closes, staff will request from each candidate all items listed in section 7.4.2. Candidates shall provide those items to the office within 15 days of the request. In addition, staff shall inform the WSPTA president and Elections Oversight Committee (EOC) of the list of candidates. Notice shall be presented to the membership electronically and posted on the WSPTA website. |
| Adopted Amendment | The process for identifying candidates for the at-large positions is run separately from the nominating committee work. Qualified persons may not be nominated by someone else but shall self-declare candidacy by submitting an application and Declaration of Good Faith form to the WSPTA office by February 15 the February deadline , stating their intent to run and willingness to serve on the committee. The form is located on the WSPTA website. Upon receipt of the form, staff shall verify that the self-declared candidate is a current PTA member of 30 days standing and contact them to confirm their willingness to serve on the nominating committee. When the self-declared window closes, staff will request from each candidate all items listed in section 7.4.2 7.1.4(5) . Candidates shall provide those items to the office within 15 days of the request. In addition, staff shall inform the WSPTA president and Elections Oversight Committee (EOC) of the list of candidates. Notice shall be presented to the membership electronically and posted on the WSPTA website. |
| Rationale | This change allows flexibility in setting a deadline that can be more easily advertised on WSPTA's various platforms and communications schedule – as well as offering more flexibility yet still setting a necessary timeframe for future boards. Reference to the policy location is incorrect in the current policy language. It was left from a previous 2022 policy update. |
| Group(s) Affected | WSPTA Candidates self-declaring for WSPTA Nominating Committee |
| Policy Amendment #15 | WSPTA Nominating Committee Candidate Materials |
| Policy Section | Section 7.1.4 Vacancies in the WSPTA Nominating Committee |
| Original Language | 5. WSPTA members of at least 30 days standing may self-nominate by declaring their intent to run and willingness to serve on the committee by submitting: a. A signed Declaration of Good Faith form b. A statement, not to exceed 200 words c. A one-page (8 ½" x 11") résumé WSPTA members shall have at least 30 days to self-nominate by submitting these items to the WSPTA office. WSPTA staff shall verify that the individual has been a WSPTA member for the previous 30 days. |
| Adopted Amendment | 5. WSPTA members of at least 30 days standing may self-nominate by declaring their intent to run and willingness to serve on the committee by submitting: a. A signed Declaration of Good Faith form b. A statement, not to exceed 200 words c. A one-page (8 ½" x 11") résumé d. A digital photo to be published in the notification sent prior to the annual meeting, in the annual meeting program, on the campaign board, and on the candidate's page on the WSPTA website. Digital photos shall be a headshot and only include the |

| | |
|-----------------------------|---|
| | <p>candidate.</p> <p>WSPTA members shall have at least 30 15 days to self-nominate by submitting these items to the WSPTA office. WSPTA staff shall verify that the individual has been a WSPTA member for the previous 30 days.</p> |
| Rationale | <p>In reviewing Nominating Committee policies, it was noted that a headshot is not asked of Nominating Committee nominees. However, headshot photos are used in the Voters' Guide and other publications/slides at the annual meeting.</p> <p>It is proposed to change the days from 30 to 15 for the self-nomination period because a 30-day deadline can run into difficulties with voting delegates deadlines and meeting announcement deadlines if the candidacy period needs to be reopened.</p> |
| Group(s) Affected | WSPTA Candidates self-declaring for WSPTA Nominating Committee |
| Policy Amendment #16 | RSC & FSC Access to Givebacks |
| Policy Section | Section 10.2 Membership Lists, fourth paragraph |
| Original Language | Region directors, field service directors, and state directors shall have access to the officer lists and membership lists of each local PTA within their boundaries, as well as the current and historic membership figures of each local and council PTA within their respective boundaries for PTA purposes only. |
| Adopted Amendment | Region directors, region service committee members , field service directors, field service committee members , and state directors shall have access to the officer lists and membership lists of each local PTA within their boundaries, as well as the current and historic membership figures of each local and council PTA within their respective boundaries for PTA purposes only. |
| Rationale | Region service committee members exist to assist the region directors to support local PTAs and councils. Field service committee members fill the same need, stepping in to help field service directors support regions with no region director support. Region directors and field service directors should be able to delegate tasks that include functionalities within Givebacks to their committee members to allow for quick and thorough support of those PTAs and councils. |
| Group(s) Affected | WSPTA |
| Policy Amendment #17 | WSPTA Newsletter Updates |
| Policy Section | Section 10.5.1 Newsletters |
| Original Language | <p>The communications committee is responsible for the content of the weekly leadership newsletter. The newsletter shall provide leaders with information that highlights current member discounts, current programs and opportunities for local PTAs and councils and provides access to resources essential for leaders in running a PTA. It is expected that the content shall be shared with members as appropriate.</p> <p>The communications committee is responsible for the content of the quarterly member newsletter. The newsletter shall provide members with information that highlights current member discounts and opportunities for students and families.</p> <p>WSPTA board members may provide content to be included in both publications.</p> |
| Adopted Amendment | <p>The communications committee is responsible for the compilation of the content of the weekly leadership newsletter. The newsletter shall provide leaders with information that highlights current member discounts, current programs and opportunities for local PTAs and councils and provides access to resources essential for leaders in running a PTA. It is expected that the content shall be shared with members as appropriate.</p> <p>The communications committee is responsible for the compilation of the content of the quarterly member newsletter. The newsletter shall provide members with information that highlights current member discounts and opportunities for students and families.</p> |

| | |
|-----------------------------|---|
| | <p>WSPTA board members representatives may provide content to be included in both publications.</p> <p>The advocacy committee is responsible for the content of the advocacy newsletter. The newsletter shall provide members with information that highlights current advocacy events and opportunities for students and families.</p> |
| Rationale | This change would clarify that the WSPTA communications committee is responsible for gathering newsletter information from WSPTA directors, committees, National PTA, and other sources rather than authoring content. Additionally, the advocacy newsletter is not mentioned in this section of policy currently and should be added. |
| Group(s) Affected | WSPTA |
| Policy Amendment #18 | Update to Membership Communications |
| Policy Section | Section 10.11 Membership Communications, bullet points #1 & #2, adding two new bullet points and renumbering the rest |
| Original Language | <p>10.11 Membership Communications</p> <p>1. Cell phones shall be silenced during all WSPTA business meetings and workshops. Video cameras and recording equipment, other than that approved by the WSPTA president, shall not be used in the assembly hall or workshops.</p> <p>2. All connections to, and information published on, the Internet in the name of the WSPTA shall be administered through the WSPTA office. All state-level communications shall be administered through the WSPTA office.</p> |
| Adopted Amendment | <p>10.11 Membership Communications Expectations</p> <p>1. Cell phones Devices shall must be silenced or put on vibrate during all in-person WSPTA business meetings and workshops.</p> <p>2. Video cameras and Recording and/or live streaming equipment, other than that approved by the WSPTA president, shall not be used during WSPTA in-person or virtual events in the assembly hall or workshops.</p> <p>3. The use of any AI notetaking, transcription or meeting assistant tools is prohibited unless pre-approved by the president.</p> <p>24. All connections to, and information published on, the Internet in the name of the WSPTA shall be administered through the WSPTA office communications committee. All state-level communications shall be administered through the WSPTA office communications committee.</p> |
| Rationale | <p>Most of these changes are updates to reflect current technology.</p> <p>Some personal AI transcription/meeting assistant/notetaking services upload content to third party apps that may publish content publicly unbeknownst to the organization hosting the meeting(s). To protect against this happening, language has been added to prohibit the use of these tools.</p> |
| Group(s) Affected | WSPTA |