Washington State PTA
Standards of Affiliation Agreement Checklist

Washington State PTA (WSPTA) provides 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, to keep your membership up to date with your progress, and to record progress in meeting minutes. There are two checklists in this document: one for councils and one for local PTAs. Please ensure you are using the correct checklist, as the requirements differ slightly.

What changed in the last two years?

- Each local PTA must have a bank account associated with the membership database ACH system for processing dues payments to State and National PTA.
- Current fiscal year membership dues shall be auto paid to WSPTA using the associated bank account on the 25th of each month.

WSPTA has many SOA resources available to help answer questions and give more detail on all requirements.

1. The *Standards of Affiliation Checklist Guide* explains each requirement in detail, and includes links to numerous resources, best practices, and ideas for success.
2. Local PTAs and councils can track progress toward meeting the WSPTA training requirement on the *WSPTA Training Tracking spreadsheet.*
3. The SOA should be mentioned in local PTA and council standing rules. Get *Standing Rules Language* here.
4. Need support? Contact your *Region Director*

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“In Good Standing” and “Participation Eligibility.”

PTAs who have completed the requirements on the checklist are said to be “in good standing” and may participate fully in all benefits that come with being affiliated with PTA. Specific SOA requirements may be verified 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 bylaw amendments, principles, 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.
    - Have at least 25 members entered into the database for the current fiscal year no later than October 31.
    - Have made a payment to WSPTA for at least 25 members no later than October 31.
- Membership dues payments:
    - Membership dues paid in full for the previous fiscal year .
    - Current fiscal year membership dues shall be auto paid using the associated bank account on the 25th of each month.
- Legal filings: All required legal filings with the Washington Secretary of State and IRS are current.

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WSPTA Standards of Affiliation Agreement for Local PTAs 2026 – 2027

In addition to the items listed below, local PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted WSPTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA. For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a region director. Additional resources, including review processes, are on the WSPTA website (wastatepta.org/pta-leaders/governance/).

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). State law requires president, treasurer, and secretary.		
	2.	Corporate Annual Report filed	Current	Filed by annual corporate renewal date (end of the month your PTA incorporated).		
	3.	Charitable Organization Registration renewed	Prior	**OPTION 1:** More than $50,000 in gross receipts - required to file by May 31. **OPTION 2:** Not required to file - will file/update the optional filing. **OPTION 3:** Not required to file - choose not to do the optional filing. *Once an account is created, it must be maintained yearly.		
IRS	4.	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than November 15 (or file the necessary extension and file by the deadline).		
Insurance	5.	Year-end financial review	Prior	Year-end financial review was conducted (recommended by August 31).		
WSPTA	6.	Officer names/contact info	Current	Entered 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.)		
	7.	Budget approved	Current	Budget was approved by the membership (recommended before previous fiscal year- end).		
	8.	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).		
	9.	Nominating committee elected	Current	Three members were elected to a nominating committee at least 30 days prior to the election of officers. (Recommended at the first membership meeting of the current fiscal year.)		
	10.	Insurance	Current	Purchased appropriate insurance (prior to November 30 to prevent lapse in coverage).		
	11.	Annual training	Current	Annually, at least one elected officer attends PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before the year's WSPTA convention. Maintain documentation showing each elected officer satisfied the annual training requirement.		
	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 October 31.		
	13.	Membership dues paid	Current & Prior	Membership dues paid in full for the previous fiscal year. Current fiscal year membership dues shall be auto paid using the associated bank account on the 25th of each month.		

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WSPTA Standards of Affiliation Agreement for Councils 2026 – 2027

In addition to the items listed below, local PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted WSPTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA. For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a region director. Additional resources, including review processes, are on the WSPTA website (wastatepta.org/pta-leaders/governance/).

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). State law requires president, treasurer, and secretary.		
	2.	Corporate Annual Report filed	Current	File by annual corporate renewal date (end of the month your council incorporated).		
	3.	Charitable Organization Registration renewed	Prior	**OPTION 1:** More than $50,000 in gross receipts - required to file by May 31. **OPTION 2:** Not required to file - will file/update the optional filing. **OPTION 3:** Not required to file - choose not to do the optional filing. *Once an account is created with the Secretary of State, it must be maintained yearly.		
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).		
Insurance	5.	Year-end financial review	Prior	Year-end financial review was conducted (recommended by August 31).		
WSPTA	6.	Officer names/contact info	Current	Entered 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)		
	7.	Budget approved	Current	Budget was approved by the membership (recommended before previous fiscal year-end).		
	8.	Standing rules approved	Current	Standing rules, including the amount of any council fees, were updated as needed and approved by the membership (recommended at first membership meeting of the current fiscal year).		
	9.	Nominating committee elected	Current	Three members were elected to a nominating committee at least 30 days prior to the election of officers. (Recommended at the first membership meeting of the current fiscal year.)		
	10.	Insurance	Current	Purchase appropriate insurance (prior to November 30 to prevent lapse in coverage).		
	11.	Annual training	Current	Annually, at least one elected officer attends PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before the year's WSPTA convention. Maintain documentation showing each elected officer satisfied the annual training requirement.		
	12.	Council Reflections Program	Current	Offer a Reflections program for local PTAs.		
	13.	Provide service to local PTAs	Current	Provide services, information, support, and leadership training to local PTAs. Maintain documentation showing services provided by the council. (Recommend budget, yearly calendar, newsletters, or other communication.)		

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