

STANDARDS OF AFFILIATION FOR GOOD STANDING



To maintain good standing with the Utah PTA, local PTA units must adhere to specific standards as outlined in the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1. Compliance with these standards ensures eligibility for materials, services, awards, and participation in PTA programs.

Bylaws and Membership

1. Adherence to Bylaws: Follow the purposes, bylaws, basic principles, and procedures of the PTA.
2. Membership Dues: Remit all National PTA and Utah PTA portions of the dues to Utah PTA by the 25th of each month. Membership must exceed 10 members to be in good standing.

Financial and Legal Compliance

3. Bylaws Approval: Ensure bylaws are approved every three years to participate in Utah PTA-sponsored activities.
4. Year-End Financial Review: Conduct a Year-End Financial Review and complete the Annual Financial Reconciliation (AFR) by August 1.
5. IRS Filing: File the appropriate IRS Form 990 by September 1.
6. Budget Approval: Have the annual budget approved by the membership by October 1, with meeting minutes.
7. Officer Information: Submit a list of incoming officers with contact details by May 1.
8. Proof of Insurance: Purchase appropriate insurance by October 1.
9. Conflict of Interest and Fiscal Management Forms: Submit signed forms by October 1.

Financial Procedures

10. Responsible Financial Practices:
 - Three money counters for all funds.
 - Two signers on all checks.
 - Immediate bank deposits following events.
11. Principal's Approval: Principal must sign each check request form.

Training and Meetings

12. Leadership Training: Has at least two (2) officers attend Utah PTA Leadership Convention or a Utah PTA approved alternate training and attend council meetings
13. Meeting Minutes: Take and approve minutes at every PTA board meeting, general membership meeting, and PTA committee meeting.
14. Nominating Committee: Elect a nominating committee to nominate eligible candidates for officer positions.
15. Officer Elections: Elect officers including one president, one president-elect, one administrative vice president, one teacher vice president, one secretary, and one treasurer.
16. Report Submissions: Submit Reports #1, #2, and #3 by their respective due dates.

Consequences of Non-Compliance

Failure to adhere to these standards results in ineligibility for:

- ♦ Materials or services from National PTA and Utah PTA
- ♦ Awards and participation in PTA programs (e.g., Reflections, Battle of the Bands)
- ♦ Voting privileges at Utah PTA conventions and conferences
- ♦ Receive sales tax refunds

After two years of non-compliance, the unit will be reported to the IRS as not in good standing, leading to the loss of tax-exempt status and charitable solicitations.

Conclusion

Maintaining good standing with the Utah PTA is crucial for the effective operation and recognition of your local PTA unit. Adhering to these standards ensures compliance with legal and financial requirements, enabling your PTA to fully participate in and benefit from PTA programs and resources. For more detailed information, refer to the Utah PTA website and the Local PTA Bylaws.

For more information on Good Standing, utahpta.org/what-good-standing

STANDARDS OF AFFILIATION					
Required by	#	Requirement	Fiscal Year	Best Practices/Specifics (Utah PTA Fiscal Year is July 1- June 30)	Date(s) Completed
Utah PTA, IRS	1	Bylaws followed	Current	Adheres to the purposes, bylaws, basic principles, and procedures of the PTA	
Utah PTA, IRS	2	Membership dues paid	Current and Prior	Remits all National PTA and Utah PTA portions of the dues to Utah PTA by the 25th of each month (not applicable to Councils)	
Utah PTA	3	Bylaws approved every 3 years	Current	Bylaws must be current to participate in Utah PTA sponsored activities (Battle of the Bands, Reflections, awards, sales tax refunds)	
IRS, DCP, Utah PTA	4	Year-end financial review/ Annual Financial Reconciliation	Current and Prior	Year End Financial Review was conducted by August 1 and the Annual Financial Reconciliation (AFR) completed by August 1	
IRS	5	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than August 1	
Utah PTA	6	Budget approved	Current	Budget was approved by the membership by October 1 with meeting minutes	
Utah PTA	7	Office names/ contact info	Current	List of incoming officers with addresses, phone numbers, and email addresses on file with Utah PTA	
State of Utah	8	Proof of insurance	Current	Purchased appropriate insurance by October 1	
Utah PTA	9	Forms signed	Current	Signed Conflict of Interest form and Basic Fiscal Management form	
DCP, Utah PTA	10	Financial procedures	Current	Three money counters, two signers on all checks, and money is deposited into bank account immediately following any event	
DCP, Utah PTA	11	Financial procedures	Current	Principal must sign each check request form	
Utah PTA	12	Training for leaders	Current	Has at least two (2) officers attend Utah PTA Leadership Convention or a Utah PTA approved alternate training and attend council meetings	
Utah PTA, IRS	13	Minutes	Current	Minutes must be taken and approved at every PTA board meeting, general membership meetings, and PTA committee meetings	
Utah PTA	14	Nominating committee elected	Current	PTA members were elected to a nominating committee to nominate an eligible person for each officer position	
Utah PTA	15	Elections	Current	Officers of this PTA/PTSA shall be one (1) president, one (1) president-elect, one (1) administrative vice president, one (1) teacher vice president, one (1) secretary, and one (1) treasurer	
Utah PTA	16	Reports	Current	Reports #1, #2, and #3 submitted by associated due dates	