

# STANDARDS OF AFFILIATION

## for Good Standing

According to the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1, the following need to be adhered to be a unit in good standing.

| Required by                                   | #         | Requirement   | Fiscal Year       | Best Practices/Specifics<br>(Utah PTA Fiscal Year is July 1- June 30)   | Date(s)<br>Completed |
|---|-----------|---|-------------------|---|----------------------|
| Utah PTA,<br>IRS                              | <b>1</b>  | Bylaws followed   | Current           | Adheres to the purposes, bylaws, basic principles, and procedures of the PTA  |                      |
| Utah PTA,<br>IRS                              | <b>2</b>  | 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                                      | <b>3</b>  | 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 refund) |                      |
| IRS, Dept of Consumer Protection,<br>Utah PTA | <b>4</b>  | Year-end financial review/<br>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   | <b>5</b>  | Form 990 filed  | Prior             | Filed the appropriate IRS Form 990 no later than August 1   |                      |
| Utah PTA                                      | <b>6</b>  | Budget approved   | Current           | Budget was approved by the membership by October 1 with meeting minutes   |                      |
| Utah PTA                                      | <b>7</b>  | Office Names/<br>Contact Info                                 | Current           | List of incoming officers with addresses, phone numbers, and email addresses on file with Utah PTA                                  |                      |
| State of Utah                                 | <b>8</b>  | Proof of Insurance  | Current           | Purchased appropriate insurance by October 1  |                      |
| Utah PTA                                      | <b>9</b>  | Forms Signed  | Current           | Signed Conflict of Interest form and Basic Fiscal Management Form   |                      |
| Dept of Consumer Protection,<br>Utah PTA      | <b>10</b> | Financial Procedures  | Current           | Three money counters, two signers on all checks and money is deposited into bank account immediately following any event            |                      |
| Dept of Consumer Protection,<br>Utah PTA      | <b>11</b> | Financial Procedures  | Current           | Principal must sign each check request form   |                      |
| Utah PTA                                      | <b>12</b> | Training for leaders  | Current           | At least two (2) officers attend one PTA leadership training session annually   |                      |

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the following need to be adhered to be a unit in good standing.

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|------------------|-----------|------------------------------------|-------------|--|-------------------|
| Utah PTA,<br>IRS | <b>13</b> | Minutes                            | Current     | Minutes must be taken an approved at every PTA board meeting, general membership meetings, and PTA committee meetings  |                   |
| Utah PTA         | <b>14</b> | Nominating<br>Committee<br>Elected | Current     | PTA members were elected to a nominating committee to nominate an eligible person for each officer of elections are to be held   |                   |
| Utah PTA         | <b>15</b> | 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         | <b>16</b> | Reports                            | Current     | Reports #1, #2, and #3 submitted by associated due dates   |                   |

# Utah PTA Standards of Affiliation for Good Standing for each PTA unit (local and council)

According to the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1, the following need to be adhered to be a unit in good standing.

1. Adheres to the Purposes (Local Bylaws, Article II), Bylaws, basic principles (Local Bylaws, Article III), and procedures of the PTA.
2. Remits all National PTA and Utah PTA portions of the dues to the Utah PTA by the 25th of each month. (Local Bylaws Article IV)
  - A. To be considered a unit in good standing, membership needs to be more than 10 members (Utah PTA Bylaws, Article IX: Members and Dues, Section 5)
3. Has Bylaws approved according to the procedures of the Utah PTA
4. Has current copies of the following on file with the council and/or the region: (Local Bylaws Article IV)
  - A. Year-end financial statements and annual financial reconciliations report by August 1
  - B. Applicable annual IRS filing by September 1
  - C. Approved annual budget and meeting minutes by October 1
  - D. List of incoming officers with addresses, phone numbers and email addresses by May 1
  - E. Proof of insurance by October 1
  - F. Signed Conflict of Interest Form and Basic Fiscal Management Form by October 1
5. Practices responsible financial procedures:
  - A. Three money counters (Local Bylaws, Article VII, Section 5 a)
  - B. Two signers on all checks (Local Bylaws, Article VII, Section 5 e)
  - C. Money is deposited into the bank account immediately following the event (Local Bylaws, Article VII, Section 5 a)
6. Has at least two (2) officers attend one PTA leadership training session annually; (Local Bylaws Article IV)
  - A. Utah PTA Annual Leadership Convention, PTA Advocacy Conference, PTA Day at the Capitol
  - B. Region Convention training
  - C. Other applicable PTA Training
7. Meets other Criteria as may be prescribed by the Utah PTA.
  - A. Minutes must be taken and approved at every PTA board meeting, General Membership Meetings, and PTA committee meetings (Local Bylaws, Article VII: Duties of Officers, Section 4 a.)
  - B. Nominating Committee
    - 1) The nominating committee shall nominate an eligible person for each office for which elections are to be held (Local Bylaws, Article VI: Officers and Their Elections, Section 5 a)
  - C. Elections

- 1) Officers shall be, one (1) president, one (1) president-elect, one (1) secretary, one (1) treasurer and at least two (2) VPs, which include Principal & Teacher.  
(Local Bylaws, Article VI: Officers and Their Elections, Section 4 a)
- D. Reports #1, #2, #3 submitted by due date (Utah PTA President Handbook, Tools, Page 59)

If the standards of affiliation are not followed, the local PTA unit will be ineligible to receive materials or services from National PTA and Utah PTA, ineligible for awards, ineligible to participate in PTA Programs (Reflections, Battle of the Bands), ineligible to receive voting privileges at Utah PTA conventions; ineligible to receive sales tax refunds; and after two years of not submitting dues by March 31, reported to the IRS as a local PTA/PTSA not in good standing, which results in the loss of tax-exempt status and charitable solicitations (Local Bylaws, Article IV, Section 2).