

What is the purpose of the Free State PTA Standards of Affiliation (SOA)?

To provide support and guidance to our local PTAs and PTSAs, Free State PTA is providing the Standards of Affiliation (SOA) Checklist to help navigate legal requirements. Completing this checklist will help local PTA/PTSA leaders ensure their independent nonprofit business remains current with all IRS, state, insurance, and PTA/PTSA requirements. We encourage you to include your entire Board of Directors in this work and keep your membership up to date with your progress.

The SOA is in place to ensure local PTAs/PTSAs align with FSPTA ethics, policies, and principles; maintain good business practices; and comply with applicable federal and state laws. National PTA makes a similar requirement of Free State PTA.

What are the benefits of the SOA?

The SOA has multiple benefits to local PTAs/PTSAs:

- Clarifies what requirements define a local PTA/PTSA in good standing.
- All requirements are in one place – no need to check multiple resources to know what is expected.
- Consistent Expectations across the state.
- Helps local PTAs/PTSAs stay on track with legal requirements.
- Allows improved service and support from all levels of PTA.

Who is responsible for the SOA at local units?

We recommend the SOA checklist be reviewed by the Board of Directors, membership, and recorded in meeting minutes. Keep copies of this checklist and pertinent documentation in your legal documents and/or treasurer binder.

What is the deadline?

There is no deadline for completion of the SOA checklist. Most requirements have their own deadlines or best practice timeframes, and everything should be completed by the end of the fiscal year. It is up to your Board of Directors to monitor the progress towards completion and be able to present the required documentation if requested for periodic review.

How do we submit our completed SOA checklist?

No need to submit the checklist. We recommend you keep a copy of the checklist and copies of all pertinent documentation in your legal documents or treasurer binder.

What is “Good Standing”?

The SOA requirements may be verified by the Free State PTA staff or executive committee throughout the year to confirm local PTA/PTSA eligibility to:

- Receive grants or program participation from FSPTA or NPTA.
- Participate in Free State PTA or National PTA awards and other programs, including Reflections Arts Program at the national level.
- Send voting delegates to Free State PTA Annual Meeting or National PTA Conventions based on Free State PTA Bylaws.
- Bring issues and resolutions to Free State PTA for consideration.

How do we know what “Good Standing” is for any given term?

Free State PTA will post that information on their website under the Governance Committee. For the 2023 – 2024 school year the following has been approved to be the Good Standing:

- Officer Contact List – Input into Givebacks
- Insurance – Declaration page uploaded to Givebacks
- Bylaws – Approved by local unit membership and uploaded with meeting minutes to Givebacks
- Remit State Dues – Pay using Givebacks (stripe fee of \$1.00 per transaction) or by check via USPS using the [Membership Form \(fspta.org\)](https://fspta.org/membership-form)

Do we need to add the SOA to our local PTA/PTSA standing rules?

Yes! With the suggested wording as follows:

Per Free State Bylaws, we will annually review the Free State PTA Standards of Affiliation Checklist in its entirety, and we agree to abide by all requirements and to uphold the ethics, policies, and principles of PTA.

Who can answer additional questions about the SOA?

If you need assistance with this checklist, help understanding any of the SOA requirements, or find that a requirement was not completed the previous year, please contact your council (if applicable) or email info@FSPTA.org.