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STANDARDS OF AFFILIATION CHECKLIST

COUNCIL PTAs

In addition to the items listed below, Council PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted Free State PTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA. Council PTAs also will always maintain of a minimum of three (3) local PTAs/PTSAs in good standing. ****Starred items are to establish “Good Standing”, please see FAQs for more information.**

For assistance with this checklist or help understanding any of the requirements, please contact SOA@FSPTA.org.

Please use this sheet for your own organization resource.

PTA/PTSA Name: _____

County: _____

Item	Due Date	Notes	Responsible PTA/PTSA Leader	Date Completed
Officer List**	July 1 st	Information is submitted every fiscal year even if there are no changes. Please include elected officers and any committee chairs.		
AIM Insurance**	July 1 st	Upload declaration page.		
Bylaws**	Revise by date on front page of your bylaws	Your bylaws need to be revised every three years and should be uploaded into Givebacks. Re-submit anytime your membership votes on change (s).		
Must have three (3) local units in good standing **	July 1st	All Council units must have three local units that are in good standing and paying council dues.		
Treasurer’s Training	Within 120 days of taking office	Training can be obtained from FSPTA Convention or FSPTA approved training. Please make sure before taking the training that it does fulfill the training requirement.		
Boardsmanship Training	Within 120 days of taking office	Training can be obtained from FSPTA Convention or FSPTA approved training. Please make sure before taking the training that it does fulfill the training requirement.		
Council Meeting Schedule	Within 2 weeks of setting the calendar.	Council calendars for meetings can be emailed to SOA@fspta.org .		
Financial Review	October 1 st	Upload Review form and year-end financial report		
IRS 990 Filing	November 15 th	990N – Accepted confirmation. 990EZ/990 full copy. Combine with Maryland Charitable and upload to Givebacks as one document.		
Maryland Charitable	December 31 st	Combine with 990 and upload to Givebacks as one document.		
Maryland Personal Property	April 15 th	Upload to Givebacks from confirmation page.		