

	Standard	Required Indicator(s)	Deadline	Information on File	Date Completed
IRS REQUIREMENTS					
1.	The state constituent association shall file the appropriate IRS Form 990 annually.	<p>If 990 filed:</p> <p><input type="checkbox"/> Cover page; <u>or</u></p> <p><input type="checkbox"/> IRS receipt of acceptance of filing</p> <p>If extension filed:</p> <p><input type="checkbox"/> IRS Form 8868 or tax preparer's letter noting requested extension*</p> <p><i>*Note: Submit the 990 cover page or IRS receipt of acceptance when filed.</i></p>	5 months after state constituent association's fiscal year end or until the authorized extension deadline	Date of last filing: _____	Completion date: _____
FINANCIAL REQUIREMENTS					
2.	The state constituent association shall annually complete either an internal review, financial compilation, review, or audit report (state laws may apply).	<p>For an internal review only (no outside CPA confirmation required):</p> <p><input type="checkbox"/> Statement of Financial Position (Balance Sheet) <u>and</u></p> <p><input type="checkbox"/> Statement of Financial Activities (Income Statement)</p> <p>For a financial compilation, review, or audit (CPA required):</p> <p><input type="checkbox"/> Report cover letter <u>or</u></p> <p><input type="checkbox"/> Complete report</p> <p><i>Note: See Annual Financial Compliance Guidance Document and Sample Annual Internal Review Form.</i></p>	5 months after state constituent association's fiscal year end or until the authorized 990 extension deadline	Date of last filing: _____	Completion date: _____
STATE CONSTITUENT REQUIREMENTS					
3.	The state constituent association's name shall incorporate PTA as the name of the association.	<p>Articles of Incorporation</p> <p><input type="checkbox"/> Submit when incorporating <u>and</u></p> <p><input type="checkbox"/> Submit if changed</p>	Within 30 days of completion and/or change	Date of document on file: _____	<input type="checkbox"/> No changes; or <input type="checkbox"/> Date of submission: _____

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NONPROFIT ORGANIZATIONAL REQUIREMENTS					
4.	The state constituent association shall be governed by a governing board (state laws shall apply, where applicable).	<input type="checkbox"/> List of names with full contact information, positions and terms of office for the board members entered via the National PTA database system	Submit within 30 days of any change	Date of document on file: _____	Completion date(s): _____ <i>Any changes to the governing board will be updated as soon as possible in National PTA database system.</i>
5.	The state constituent association shall adopt, revise, and adhere to bylaws that reflect correctly the current rules and practices of this association.	Governing document(s) <input type="checkbox"/> Bylaws <u>and</u> <input type="checkbox"/> Standing rules or other operating procedures/policies, when requested	Submit within 30 days of change When requested	Date of document on file: _____ NA	<input type="checkbox"/> No changes; or <input type="checkbox"/> Date of submission: _____ No submission required unless requested
AFFILIATION REQUIREMENTS					
6.	The state constituent association shall confirm agreement with all requirements of compliance of the National PTA Standards of Affiliation, including the Requirements and the Procedures.	Signatures on Memorandum of Understanding <input type="checkbox"/> President <input type="checkbox"/> Treasurer	One-time signatures and initials, submission by January 12, 2024, and subsequently when SOA policy is updated	Date of document on file: _____	Completion date: _____
7.	The state constituent association shall neither engage nor threaten to engage in any actions that may cause harm to the value and goodwill associated with the PTA Trademarks or brand.	<input type="checkbox"/> Current actions <u>and</u> <input type="checkbox"/> Operating practices	NA	NA	No submission required/ongoing practice

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AFFILIATION REQUIREMENTS (cont.)					
8.	The state constituent association shall operate according to the vision, mission, values, and policies of National PTA as well as the National PTA legislative and advocacy priorities and adopted positions and resolutions.	<input type="checkbox"/> Current actions <u>and</u> <input type="checkbox"/> Operating practices	NA	NA	No submission required/ongoing practice
9.	The state constituent association shall utilize, display and incorporate the PTA Trademarks, vision statement, mission statement, and values in conformity with National PTA guidelines.	<input type="checkbox"/> Website <u>and</u> <input type="checkbox"/> Newsletters <u>and</u> <input type="checkbox"/> Social media <u>and</u> <input type="checkbox"/> Communications	NA	NA	No submission required/ongoing practice
10.	The state constituent association shall prioritize membership recruitment, retention, and growth and assign these responsibilities to a member of the governing board.	<input type="checkbox"/> Submission of a membership plan with goals for the July 1-June 30 membership year, <u>and</u> <input type="checkbox"/> Submission of the name, full contact information and term of office for the assigned board member entered via the National PTA database system using the position title "Membership Lead"	Submit annually by August 31 Submit within 30 days of any change	Date of document on file: _____ Date of document on file: _____	Completion date: _____ Completion date(s): _____ <i>Enter any changes to this position as soon as possible via the National PTA database system.</i>
11.	The state constituent association shall submit a monthly membership dues report and pay any outstanding amounts due using the Automated Clearing House (ACH) payment system also known as Electronic Fund Transfers.	<input type="checkbox"/> Submit via the National PTA database	Monthly (by 11:59 pm EST on the 5 th business day)		Submission required as indicated

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AFFILIATION REQUIREMENTS (cont.)					
12.	The state constituent association shall prioritize diversity, inclusion, and outreach and assign these responsibilities to a member of the governing board.	<input type="checkbox"/> Submission of a diversity plan with goals for the July 1-June 30 membership year, <u>and</u> <input type="checkbox"/> Submission of the name, full contact information and term of office for the assigned board member entered via the National PTA database system using the position title "DIO Lead"	Submit annually by August 31 Submit within 30 days of any change	Date of document on file: _____ Date of document on file: _____	Completion date: _____ Completion date(s): _____ <i>Enter any changes to this position as soon as possible via the National PTA database system.</i>
13.	The state constituent association shall submit a list of all constituent associations with their officers' information.	<input type="checkbox"/> List of all constituent associations with their officers' names, full contact information, positions, and terms of office submitted as directed by National PTA <i>Note: In the event that the spring/summer reporting deadline occurs prior to the state constituent association's receipt of updated information, an initial submission of "no change" will be accepted. Any state constituent association that reports "no change" is required to submit an updated list within 45 days of the reporting deadline.</i>	As requested by National PTA but at least twice—in the spring/summer and fall/winter—of each fiscal year of National PTA	Date of last submission: _____	Submission required as indicated

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AFFILIATION REQUIREMENTS (cont.)					
14.	The state constituent association's board shall participate in National PTA-facilitated training at the start of each president's term/year.	Training(s) facilitated by National PTA-assigned or -approved individual(s): <input type="checkbox"/> Electronically <u>or</u> <input type="checkbox"/> In person <u>and</u> <input type="checkbox"/> 100% of executive committee and 2/3 of board in attendance	Within six months of the beginning of the president's term and at least every two years <i>Note: If a vacancy in the office of president occurs, training must be held if more than half the term remains and/or a majority of the board members did not attend the last training.</i>	Date of last training: _____	Training date(s):