Q: Is the National PTA Standards of Affiliation (SOA) Policy included in the National PTA Bylaws?

A: The National PTA Bylaws describe the connection between the parent association and its state constituent associations and establish the National PTA Standards of Affiliation (SOA) as the definitive policy for this relationship.

Q: Why was the National PTA SOA policy adopted?

A: National PTA charters state constituent associations to further the work and achieve the mission of National PTA. This policy sets the benchmarks for a successful state constituent association; protects the National PTA name, identity, and brand; and ensures that all will be treated fairly and equally. The intent of the SOA is to ensure state constituent associations comply with applicable federal laws and align all communications and actions with National PTA’s vision, mission, values, and policies, as well as the National PTA legislative and advocacy priorities and adopted positions and resolutions. National PTA recognizes its responsibility to preserve the reputation and trust of the PTA brand through support of its constituent associations from local to state.

Q: Why was the SOA policy amended?

A: The policy was amended to address sustainable staff and volunteer responsibilities and budget allocations and to strengthen the focus on membership recruitment, retention, and growth. As always, National PTA’s goal is to continue to reinforce the relationship between the state PTAs and the national association, provide the necessary support for success, and protect and increase the value of the PTA name.

Q: Who develops proposed amendments to the SOA policy for approval by the National PTA Board of Directors?

A: The National PTA Field Service Committee, according to the National PTA Bylaws, develops and evaluates strategies for the effective service delivery to all constituent associations. For the 2019-2021 term, the committee was charged with working with staff to ensure compliance with current SOA policy and to evaluate its effectiveness and efficiency in promoting our association’s mission. Based on current needs of the association, several amendments were proposed.
Q: What are the differences between the last approved SOA policy and the amended policy approved to go into effect January 1, 2020?

A: The approved amendments address representation by National PTA at state constituent associations’ annual meetings/conventions or other statewide events; focus efforts on membership recruitment, retention, and growth; and clarify the presentation of required board training. As a result of these amendments, the MOU was amended to reflect these changes, and a new agreement must be signed and submitted no later than March 1, 2020.

Q: What are the specific amendments to the SOA policy that go into effect January 1, 2020?

A: The amendments are listed below.

1. **Change: National PTA Representation** – A representative will be assigned to attend state PTA annual meetings/conventions or other statewide events once every two years, instead of every year.

2. **New: Membership** – A membership requirement was added that states: “The state constituent association shall prioritize membership recruitment, retention, and growth and assign these responsibilities to a member of the governance team.” This amendment includes:
   - Submission of a state PTA membership plan with goals each year by August 31
   - Submission of the full contact information and term of office for the individual assigned membership responsibilities entered via the National PTA database system, with any changes submitted within 30 days of the change
   - Amendment (if appropriate) to governing document(s) if this membership position does not exist and the state PTA leadership decides to amend the bylaws and/or standing rules make this position permanent

3. **Change: Training** – The majority of the required board training provided by a National PTA representative will occur electronically.

4. **Change: Glossary** – The *Glossary of Terms* is now a separate document, with the additional definition of “governance team” (“Refers to the state constituent association’s elected and appointed volunteer members who have the authority to make recommendations and/or decisions for the association, to include the board members, committees, and special appointments”).

Q: With the amended SOA policy taking effect January 1, 2020, how will the representation assigned to attend my state PTA’s event change?

A: Any National PTA representation previously assigned for 2019 did not change. However, the requests and assignments beginning January 1 2020 will follow a new process, which will be
communicated in December 2019. State PTAs can request representation once in a National PTA President’s term. National PTA representatives are selected based on their ability to inspire others about PTA’s mission and/or educate about specific knowledge or skills. National PTA Representatives may be National PTA officers, board members, executive staff or committee chairs. Assignments for spring 2020 will be decided on a first-come, first-served basis through January 10. Later assignments will follow a timeline to be provided.

Q:  If a National PTA representative attended my state PTA’s event in 2019 before the amended SOA policy went into effect, when can I next request a National PTA representative?
A:  A National PTA representative can be requested for an event in 2020, with the understanding that a representative could not be requested for another event until the next National PTA President takes office.

Q:  With the amended SOA policy taking effect January 1, 2020, when does my state PTA have to submit its membership plan and goals?
A:  Your state’s membership plan and goals for the 2020-2021 fiscal year must be submitted by August 31, 2020.

Q:  With the amended SOA policy taking effect January 1, 2020, when does my state PTA have to submit full contact information and term of office for the individual assigned membership responsibilities?
A:  The first required time your state will have to submit full contact information and term of office for the individual assigned to membership duties is January 1, 2020.

Q:  With the amended SOA policy taking effect January 1, 2020, when do the changes to the required board training take effect?
A:  The training changes go into place immediately. As in the past, state PTA leaders have the option of identifying an outside trainer such as an attorney or professional board trainer to provide the training, as long as National PTA approves the trainer and the content. To request this option, email soa@pta.org and provide the name and credentials of the trainer, as well as the training outline or overview.

Q:  Is there a red-lined document tracking the changes to the amended policy?
A:  This type of documentation has not been provided, but specific questions may be addressed to the Field Service Committee at info.fieldservice@pta.org.
Q: Where can I find SOA policy and resources online?
A: Beginning January 1, 2020, you can find the amended SOA policy and resources online here.

Q: When does the amended SOA policy go into effect?
A: The amended policy takes effect January 1, 2020. Some items, as noted above, will have different deadlines.

Q: Do state PTAs have to complete and submit the National PTA SOA Requirements Chart?
A: No, this chart was developed to help state PTA leaders track submissions to soa@pta.org and inform their boards of the current compliance status.

Q: What is the purpose of the Memorandum of Understanding (MOU)?
A: The purpose of the MOU is to set forth the agreement between National PTA and the state PTAs.

Q: Why are state PTAs required to sign a new MOU?
A: The SOA policy requirements specify that a new MOU must be signed when the policy is updated.

Q: Does the amended SOA policy go into effect before or after the new MOU is signed by my state PTA?
A: The amended policy takes effect January 1, 2020 whether or not a state PTA has signed and submitted the new MOU.

Q: What if a state PTA does not sign and submit a new MOU to soa@pta.org by the March 1, 2020 deadline?
A: The state PTA will go out of compliance per the SOA policy.

Q: Who should be informed of the amended SOA policy?
A: The entire state PTA board of directors should be informed, since maintaining compliance with the SOA policy is a board responsibility.
Q: What if I have specific questions regarding the SOA policy?
A: If you have specific questions regarding the SOA policy, contact soa@pta.org.

Q: How can I provide feedback regarding the SOA policy?
A: To provide feedback on the SOA policy, contact info.fieldservice@pta.org or the National PTA President.