



every child. one voice.

Local Unit and Council Standards of Affiliation Checklist

All local units and councils in "good standing" with the Pennsylvania PTA are entitled to receive access to resources, training, technical assistance, mailings, and other services. In order to be "in good standing" a PTA needs to be in compliance with the Standards of Affiliation of the National PTA and the Pennsylvania PTA. Completing the following checklist will insure your PTA remains in "good standing". **Please forward the following items to the Pennsylvania PTA by mail: 4804 Derry Street, Harrisburg, PA 17111; email: info@papta.org;** As a service to local units and councils, the state office will keep your important documents in a safe and confidential file.

Complete Name of PTA _____ EIN _____ County _____ Region # _____

Standard of Affiliation	Member Responsible	Due Date	Date Submitted	Notes
Annual Local Unit Registration Form Or Annual Council Registration form	President	Immediately following elections, but NO LATER than June 15		Must be submitted every year even if there are no changes.
Bylaws	Bylaws Chair or President	Every 5 years Last Approval Date _____ (from signature page)		Complete revision on newest model obtained from Pennsylvania PTA. Amended as needed. Copies of most current are on file at state office
State and National Membership Dues	Treasurer or Membership Chair	At least a portion by October 15.		Submit monthly with list of members.
Financial Audit*	Treasurer	Within 30 days of approval by general membership		Done by auditor or an auditing committee of not less than three members, who are not authorized to sign checks; report needs to be approved by membership.
IRS Annual Report (Form 990, 990EZ or 990N) **	Treasurer	Within 30 days of filing last date of fiscal year _____		IRS requires all tax-exempt organizations to file an annual return. Depending on gross receipts, a Form 990/990EZ or 990 N must be filed by the 15 th day of the 5 th month after end of fiscal year (e.g. A June 30 year end return would be due by November 15)
Certificate of Incorporation*	Treasurer	Within 30 days of registering. Form 5110 Annual Statement- Nonprofit Corporation, needs to be filed on or before April 30 th .		Highly recommended, but not required. Incorporation provides another level of protection.
Pennsylvania Sales Tax Exemption Certificate*	Treasurer	Within 30 days of receipt. Sales Tax licenses are to be renewed no less than every 5 years. Date of license _____		Recommended, but not required.

* Make at least 2 copies: one for unit records, one for Pennsylvania PTA
 ** Make at least 3 copies: one for unit records, one for Pennsylvania PTA, one for the appropriate agency