

WSPTA Standard of Affiliation Agreement for Local PTAs 2025-2026

In addition to the items listed below, local PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted WSPTA or National PTA positions, resolutions, or issues, or the values, mission, visions and purposes of PTA. For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a region director. Additional resources, including review processes, are on the WSPTA website (www.wastatepta.org/pta-leaders/governance/).

Required By	#	Requirement	Fiscal Year	Best Practice/Specifics (WSPTA fiscal year is July 1 - June 30)	Responsible PTA Leader	Date(s) Completed
State of Washington	1	Officers Elected	Current	Officers were elected at a membership meeting (recommended before previous fiscal year-end). State law requires president, treasurer, and secretary)	Nicole	5/14/2025
	2	Corporate Annual Report Filed	Current	Filed by annual corporate renewal date (end of the month your PTA incorporated).	Jonelle	9/10/2025
	3	Charitable Organization Registration renewed	Prior	Option 1: More than \$50,000 in gross receipts - required to file by May 31st. Option 2: Not required to file - will file/update the optional filing. Option 3: Not required to file - choose not to do the optional filing. *Once an account is created, it must be maintained yearly.	Jonelle	2/2/2026
IRS	4	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than November 15 (or file the necessary extension and file by the deadline).	Jonelle	8/28/2025
		Form 8822-B updated (<i>This only needs to be done when responsible party changes</i>)	Current	Filed Form 8822-B when the PTA's mailing address changes or the identity of the "responsible party" as listed on the IRS Form 990 changes. The IRS requires a personal social security number. Must be updated within 30 days of change.	Jonelle	N/A for this year
Insurance	5	Year-end financial review	Prior	Year-end financial review was conducted (recommended by August 31st).	Jonelle	7/8/2025
WSPTA	6	Officer names/contact info	Current	Entered names and contact information for all elected officers (and key non-elected positions such as membership, advocacy/legislative, Reflections, programs, and family & community engagement) in the membership database (recommended before previous fiscal year-end, update as needed.)	Jonelle	Done, will update as needed
	7	Budget approved	Current	Budget was approved by the membership (recommended before previous fiscal year-end).	Jonelle	6/11/2025
	8	Standing rules approved	Current	Standing rules were updated as needed and approved by the membership (recommended at first membership meeting of the current fiscal year).	Heather/Alisha	9/10/2025
	9	Nominating committee elected	Current	Three members were elected to a nominating committee at least 30 days prior to the election of officers. (Recommended at the first membership meeting of the current fiscal year.)	Heather/Alisha	1/21/2026
	10	Insurance	Current	Purchased appropriate insurance (prior to November 30th to prevent lapse in coverage). <i>List Everett Public Schools as an additional insured for general liability policy only.</i>	Jonelle	9/16/2025
	11	Annual training	Current	Annually, at least one elected officer attends PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before the year's WSPTA convention. Maintain documentations showing each elected officer satisfied the annual training requirement. <i>Fill In the Training Tracker on the share drive.</i>	Heather/Alisha, Jonelle, Raina, Nicole, Craig	5/2-4/2025, 5/2-4/2025, 12/10/2025, 5/2-4/2025, 5/2-4/2025
	12	25-member minimum	Current & Prior	Had at least 25 members (or approved membership waiver) the prior fiscal year. Enter into the membership database and submit a payment to WSPTA for at least 25 members for the current fiscal year no later than October 31.	Craig	7/5/2025
	13	Membership dues paid	Current & Prior	Membership dues paid in full for the previous fiscal year by June 30. Current fiscal year membership dues shall be paid at the end of the month in which they were entered. Enter current fiscal year members within 30 days of member payment.	Jonelle/Craig	Ongoing