

STANDARDS OF AFFILIATION CHECKLIST

LOCAL PTA/PTSA

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 Free State PTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA in accordance with Local Unit bylaws: ARTICLE IV – Relationship with National PTA and Free State PTA. **All items will be considered when determining "Good Standing" for FY 2026-2027.**

For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or info@FSPTA.org. Please use this sheet for your own organization resource.

PTA/PTSA Name: _____

County: _____

Item	Due Date	Notes	Responsible Leader	Date Complete
Officer List	July 1 st	Information is <u>entered into Givebacks</u> every fiscal year even if there are no changes. Please include elected officers and any committee chairs. President, Treasurer, and Recording Secretary must have home address included.		
AIM Insurance	July 1 st	Upload Member Certificate of Insurance page to Givebacks.		
Bylaws	Within 30 days of revision	Bylaws need to be revised every three years and should be uploaded to Givebacks. Re-submit anytime your membership votes on change(s).		
Bylaws Revision Minutes	Within 30 days of revision	General Membership meeting minutes that approved the revision of Bylaws need to be uploaded to Givebacks. Re-submit anytime your membership votes on change(s).		
Remit State Dues	September 30th and monthly thereafter	Electronic Payment via Givebacks, USPS via Membership Form		
Treasurer's Training	Within 120 days of taking office	Training can be obtained from FSPTA Convention, Council training, or FSPTA approved training. Please make sure before taking the training that it does fulfill the training requirement. This requirement is for both <u>President</u> and <u>Treasurer</u> .		
Boardsmanship Training	Within 120 days of taking office	Training can be obtained from FSPTA Convention, Council Training, or FSPTA approved training. Please make sure before taking the training that it does fulfill the training requirement. This requirement is for <u>President</u> and <u>one other elected officer</u> .		
Financial Review	October 31 st	Upload Review form to Givebacks		
Year End Financial Report	October 31 st	Upload annual financial report to Givebacks		
IRS 990 Filing	November 15 th	990-N – <u>Accepted</u> 990-EZ full copy uploaded into Givebacks.		
Maryland Charitable	December 31 st	Upload Exempt Organization Fundraising Notice form or Annual Update of Registration form to Givebacks.		
Maryland Personal Property	April 15 th	Upload a copy of the Annual Report to Givebacks.		