

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. **** Starred items are to establish “Good Standing”, please see FAQs for more information.**

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

PTA/PTSA Name: _____

County: _____

Item	Due Date	Notes	Responsible PTA/PTSA Leader	Date Completed
Officer List**	July 1 st	Information is entered into Givebacks 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**	Revise by date on front page of your bylaws	Bylaws need to be revised every three years and should be uploaded with the General Membership meeting minutes that approved the revision. Re-submit anytime your membership votes on change (s). Upload into Givebacks		
Remit State Dues **	October 31 st and every month thereafter that new members join	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 two officers, one whom must be the Treasurer .		
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 President and one other elected officer. (Goes into effect July 1, 2025)		
Financial Review	October 1 st	Upload Review form and year-end financial report to Givebacks		
IRS 990 Filing	November 15 th	990-N – Accepted confirmation. 990-EZ full copy uploaded into Givebacks.		
Maryland Charitable	December 31 st	Upload annual update of Annual or Exempt Registration to Givebacks.		
Maryland Personal Property	April 15 th	Upload a copy of the annual report to Givebacks.		