Standards of Affiliation Checklist 2023-24 (July 1-June 30)

PTA NAME _____

PTA REGION # _____ PRESIDENT_____

STANDARDS OF AFFILIATION	REQUIRED INDICATORS	DATE DUE	COMPLETED (Pres Initials)
President, Officers and Chair Names and Contact Information	*List uploaded/input to Givebacks*	July 15	
Volunteer Hours	Service, legislative and fundraising hours. Report on this form.	June 30	
990N/990EZ/990 Filed	Copy of IRS or file990.org receipt in treasurer files	November 15	
Charitable Solicitation Act Report	Receipt from Ohio AG office in treasurer files	November 15	
National/State Membership Dues	**Dues submitted to Ohio PTA via Givebacks**	November 30	
Financial Review Completed	Copy in Unit/Council treasurer files (instructions are in the Legal and Financial Handbook)	November 30	
Bonding Insurance	Certificate of coverage in treasurer files	November 30	
Code of Ethics	Membership approval of code of ethics policy (Sample)	November 30	
Conflict of Interest Policy	Membership approval of conflict of interest policy (Sample)	November 30	
Updated Bylaws	Updated bylaws on file with Ohio PTA (Templates)	Every 3 years	
SOA Checklist	*Completed Checklist uploaded and submitted to Givebacks*	November 30	
OPTIONAL SUCCESS STORY: Brag about a fall program or event for students or families that was a success for your unit/council.			