

Wisconsin PTA Policy – Standards of Affiliation

General Association and Business Standards for Chartered Units/Councils

PTA Affiliates in Good Standing are entitled to the following rights and benefits:

- Affiliation with National PTA and Wisconsin PTA – Status as a Chartered Unit/Council
- Access to exclusive National and State PTA resources, training, technical assistance and other services
- Eligibility for grants or program participation funds
- Participation in National and Wisconsin PTA awards programs
- Access to readymade programs such as Reflections and Take Your Family to School Week
- State bulletin, The Wisconsin Parent Teacher, six times per year
- Nonprofit federal tax exemption under the Wisconsin PTA group exemption
- Use of National PTA service marks (including PTA ® and PTSA ®) in conjunction with name of the PTA Affiliate
- Exemption from Wisconsin State sales tax (units must apply individually)
- Use of official PTA and PTSA logo
- Collection of individual local membership dues
- Sending voting delegates to National PTA’s annual convention representing Wisconsin PTA based on policies set by National PTA and Wisconsin PTA
- Sending voting delegates to Wisconsin PTA’s annual convention based on policy set by Wisconsin PTA
- Bringing resolutions to Wisconsin PTA for consideration

Associational Standards of Affiliation

- Affiliates shall include the PTA or PTSA in their name.
- PTA Affiliates shall adopt the mission and purposes of the PTA. PTA Affiliates shall operate in accordance with the policies and positions of National and Wisconsin PTA.
- PTA Affiliates shall be governed by a governing board as specified in their bylaws and shall submit an officers’ list annually by September 15.
- PTA Affiliates shall adopt bylaws and shall review and submit them to Wisconsin PTA every 3 years.
- PTA Affiliates shall have 10 members to organize a local affiliate and 15 members to sustain good standing status of an existing affiliate.
- Established PTA Affiliates shall remit the State and National PTA portion of the dues for every member to the Wisconsin PTA once a month for each month dues are collected. The unit must have dues for at least 15 members submitted by November 1 to be in good standing.
- PTA Affiliates shall submit a copy of their financial audit to Wisconsin PTA by November 1 annually.
- PTA Affiliates shall submit proof of filing a 990N or 990EZ by December 15 annually.

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- PTA Affiliates are recognized as independent nonprofit tax exempt Associations by the US Internal Revenue Code under section 501(c)3 and Wisconsin Department of Revenue. The proper IRS forms shall be filed on an annual basis as required by current tax law. A copy shall be filed with Wisconsin PTA by December 15. Extension requests filed with the IRS shall also be filed with Wisconsin PTA.
- PTA Affiliates shall register with the Wisconsin Department of Financial Institutions as required by Wisconsin statutes. It is recommended that a copy of the original registration certificate be submitted to Wisconsin PTA to be kept on file in the State PTA office.
- PTA Affiliates shall file an annual financial report with the Wisconsin Department of Financial Institutions as determined by state regulations. It is recommended that a copy be submitted to Wisconsin PTA within 30 days of filing with the State of Wisconsin.
- PTA Affiliates are entitled to state sales tax exemption. A copy of the Sales Tax Exemption Certificate shall be submitted to Wisconsin PTA and will be kept on file in the State PTA office.
- PTA Affiliates shall properly utilize, display and incorporate the PTA official logo, tag line and mission statement in conformity with National PTA Guidelines.
- PTA Affiliates shall pay all outstanding amounts due to Wisconsin PTA within 30 days of receipt
- PTA Affiliates shall follow standard, fiscally responsible financial procedures. Procedures shall be available for review upon request.
- PTA Affiliates shall meet as specified in their bylaws and shall maintain Association documents in accordance with the Records Retention Schedule (Wisconsin PTA Treasurer's Handbook) and must be available for review.
- PTA Affiliates shall maintain a list of members and submit them with the required membership dues to the Wisconsin PTA office.
- **PTA Affiliates shall be considered in good standing when:**
 - A new PTA has 10 members or an existing PTA has 15 members
 - An officers' list is submitted annually by September 15
 - First installment of dues (at least 15 members) is received in the state office by November 1
 - A copy of the yearly audit is received in the state office by November 1
 - A current copy of the bylaws is submitted every 3 years for approval.
 - Proof of filing the proper IRS forms is submitted by December 15.

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Procedures Regarding PTA Affiliates in Non-Compliance with the Standards of Affiliation – Good Standing

Affiliates not in good standing at the beginning of the year will receive a Reinstatement Packet in place of the Summer Packet. The packet will contain:

- Explanation of good standing
- Notification of why they are not in good standing
- Resources to bring the affiliate into good standing and start the membership year.

Affiliates will receive the rest of the Summer Packet once they are in good standing. Affiliates that remain not in good standing will only receive further resources to bring the affiliate current. All* affiliates will be allowed to attend Leadership and Legislative Conferences and will be invited to attend the Wisconsin PTA Annual Convention.

**Affiliates who have not submitted an officer list will not receive any communications from Wisconsin PTA except for those related to good standing. The affiliate will not receive the summer, fall and convention mailings or the Wisconsin Parent Teacher.*

Any affiliate with “good cause” for not being in good standing may contact Wisconsin PTA to explain the reasons and will be placed in pending to give the unit time to resolve the situation and submit the required materials. Wisconsin PTA will provide support as necessary to bring the unit/council back to good standing. If the situation is not remedied in 60 days, the unit pending status will be revoked and the affiliate will again be considered not in good standing.

Affiliates not in good standing on December 15 will receive “Letter A” stating the reason(s) they are not in good standing and will be referred to the president elect for remediation. The president elect will assign a Wisconsin PTA board member to contact the affiliate and assist with attaining Good Standing if needed. These affiliates will not receive the fall mailing and will not be eligible for awards. If the officer list and/or bylaws are the only item not in good standing, the affiliate will be eligible for awards if their officer list and/or bylaws are submitted to the Wisconsin PTA office by the award deadline date.

Affiliates still not in good standing on March 1 will receive “Letter B” which will describe what actions are necessary to be in good standing and the consequences for non-compliance by the stated deadline.

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Consequences of “Letter B”

Dues – affiliates that have not submitted dues for at least 15 members by the stated deadline will be considered inactive and their charter will be evaluated for withdrawal. If appropriate, the charter will be revoked upon approval at the next board meeting. Affiliates will receive “Letter C” at that time stating that their charter has been revoked and giving directions to either dissolve or to contact Wisconsin PTA for help with reinstatement.

Officer List - affiliates that have not submitted their current year officer list by June 30 will be subject to remediation and a continued loss of state resources. A board member will be assigned to the unit to secure their officer list for the new year. Failure to submit their new officer list by September 15 will result in the loss of charter upon approval by the board of directors at their next meeting. Affiliates will receive “Letter C” at that time stating that their charter has been revoked.

Audit – affiliates that have not submitted the audit of the last fiscal year by June 30 will be subject to a state audit at the affiliate’s expense. Fees will be: \$25 for up to 2 hours, \$50 for 2 – 5 hours and negotiated for audits that require over 5 hours. Failure to comply will result in the continued loss of state PTA resources. Failure to submit audits for 2 consecutive years will result in the loss of charter upon approval by the board of directors at their next meeting. Affiliates will receive “Letter C” at that time.

Bylaws – affiliates that had bylaws due before December 15 of the current school year must have bylaws submitted by June 30. Failure to submit bylaws by June 30 will result in remediation and a continued loss of state resources. A state board member will oversee the bylaws committee of the affiliate at a fee of \$25. Affiliates will be responsible for the board member’s expenses while working on their bylaws. Non-compliance within 1 year of the original due date will result in the loss of charter upon approval by the board of directors at their next meeting. Affiliates will receive “Letter C” at that time.

Proof of Filing Required Federal Annual Reports – affiliates that have not submitted proof of filing the proper IRS forms by June 30 will be subject to remediation and a continued loss of state resources. A board member will be assigned to help the unit file their IRS forms if the unit has not done so and will then secure the proof of filing for Wisconsin PTA. Failure to submit proof of filing for 2 consecutive years will result in the loss of charter upon approval by the board of directors at their next meeting. Affiliates will receive “Letter C” at that time.

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Procedures Regarding PTA Affiliates in Non- Compliance with the Standards of Affiliation – Standards not tied to Good Standing

When an infraction of the standards of affiliation not tied to Good Standing is suspected the matter will be referred to the President Elect, who will assign an appropriate board member to the affiliate who will offer resources and support to bring the affiliate back into compliance. Failure to comply will result in a loss of State PTA resources. Habitual noncompliance of one or more standards of affiliation may result in the loss of Charter.

When the noncompliance is an “alleged violation by local PTAs of the National PTA Bylaws, the Wisconsin PTA bylaws, (or their own bylaws) or other practices or activities of local PTAs that may tend to defeat the Objects and basic policies of the Wisconsin PTA, “the state president and president-elect shall review any alleged violations by local PTAs or individual local/council officers of the National PTA Bylaws, the Wisconsin PTA bylaws, (or their own bylaws) or other practices or activities, including mismanagement of the unit and mishandling of funds, of local PTAs or PTA officer(s) that may tend to defeat the purposes and basic principles of the Wisconsin PTA, and shall promptly report to the state board of directors the results of such review and its recommendations for action

The Wisconsin PTA Board of Directors shall give due consideration to the report and shall accord the local PTA or PTA officer(s) an opportunity to be heard and to respond to the report. If, upon such consideration and hearing, the Wisconsin PTA Board of Directors finds a violation by a local PTA or PTA officer(s), it may, by a two-thirds vote of all its members then in office, require the local PTA or PTA officer(s) to take appropriate action within a period of time stipulated by the Wisconsin PTA Board of Directors. When such a requirement has been made by the Wisconsin PTA Board of Directors, and if the recommended action is not taken by the local PTA or PTA officer(s) within the allotted time, the Wisconsin PTA Board of Directors may, by a two-thirds vote of all its members then in office, withdraw the charter of the local PTA and terminate its status as a local PTA or to remove the PTA officer(s) from office”.

(Wisconsin PTA Bylaws Article XV, Sections 1 & 2)