



## STANDARDS OF AFFILIATION 2014-2015

To maintain proper legal and liability status, all PTAs are required to be in “good standing” with the Connecticut PTA.

A benefit of affiliation with PTA is a central location for all of your important legal and organizational documents.

As a part of our service to you and your members, all of the following information will be kept in your file at the CT PTA office.

Name of PTA: \_\_\_\_\_

Date: \_\_\_\_\_

Item	Format	Due to CT PTA Office	Date Sent	Rationale
<b>Submit Officer Information</b>	Electronically <a href="http://www.ctpta.org">www.ctpta.org</a>	<b>July 1<sup>st</sup></b> (Should be communicated immediately after election of officers)		This is required to allow State & National PTA to communicate with each PTA and the leadership team responsible. <b>A new form is required every year - even if there are no changes to officers.</b>
<b>Membership Fees</b>	Mail w/Reporting Form( <i>Treasurer Report</i> )	<b>Monthly</b> (only in months you have new members to report)		Fees provide State and National PTA with the resources to assist affiliates and advocate for children. Initial membership fees must be received by Oct. 15 <sup>th</sup> to be eligible for insurance. Fees are \$5.50 per voting member.
<b>Review of Financial Records</b>	Electronic, mail or fax	<b>September 30<sup>th</sup></b>		This is required for bonding insurance and is a good practice to ensure your financial process is sound. Refer to Money Matters Guide for specifics.
<b>Copy of IRS Form 990</b>	Electronic, mail or fax	<b>October 31<sup>st</sup></b>		All PTAs are <b>mandated by the IRS</b> to complete form 990 to maintain non-profit status. Make 3 copies – one for each - IRS, CT PTA and your PTA files.
<b>Proof of Insurance</b>	Electronic, mail or fax	<b>November 30<sup>th</sup></b>		Insurance is needed to protect your officers against lawsuits, guard your treasury for loss or theft and provide liability coverage for your events. Applications and renewals will be sent to you in September. If using AIM insurance as your provider, no proof is necessary (AIM reports this information directly to CT PTA)
<b>Bylaws</b>	Electronic, mail or fax	<b>Every three years</b>		Bylaws are your PTAs basic governing document. Bylaws should be reviewed on a regular basis to insure accuracy. If no update is needed, the requirement is to conduct a review and have your General Membership approve. <i>Prior to the General Membership vote, proposed bylaws should to send to Connecticut PTA office for review.</i>
<b>President and Treasurer Training</b>	Leaders are required to participate in leadership training that has been provided or approved by Connecticut PTA.	<b>Every year before Oct. 15<sup>th</sup></b> (or within 60 days of taking office, whichever is longer)		Training allows for the dissemination of the most current regulations, trends and standards in PTA and parent engagement. Training will occur at council or local level, through webinars and at the statewide training. Council-based training must be approved by Connecticut PTA.

**Connecticut Parent Teacher Association**  
**60 Connolly Parkway, Building #12 Suite 103**  
**Hamden, CT 06514-2519**  
**203-281-6617 Office/ 203-281-6749 Fax**  
[membership@ctpta.org](mailto:membership@ctpta.org)  
[office@ctpta.org](mailto:office@ctpta.org)