

West Virginia PTA Policy – Standards of Affiliation

General Association and Business Standards for Chartered Units/Councils

SECTION I:

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

1. Affiliation with National PTA and West Virginia PTA – Status as a Chartered Unit/Council
2. Access to exclusive National and West Virginia PTA resources, training, technical assistance and other services
3. Eligibility for grants or program participation funds
4. Participation in National and West Virginia PTA awards programs
5. Access to readymade programs such as Reflections, Student Healthy Recipe Challenge, Healthy Lifestyles month and Take Your Family to School Week
6. Bi-monthly state bulletin, The West Virginia PTA Bulletin
7. Nonprofit federal tax exemption under the West Virginia PTA group exemption
8. Use of National PTA service marks (including PTA[®] and PTSA[®]) in conjunction with name of the PTA Affiliate
9. Exemption from West Virginia State sales tax
10. Use of official PTA and PTSA logo
11. Collection of individual local membership dues
12. Sending voting delegates to National PTA's annual convention representing West Virginia PTA based on policies set by National PTA and West Virginia PTA
13. Sending voting delegates to West Virginia PTA's annual convention based on policy set by West Virginia PTA
14. Bringing resolutions to West Virginia PTA for consideration

Section II:

Associational Standards of Affiliation

1. Affiliates shall include the PTA or PTSA in their name.
2. 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 West Virginia PTA.
3. PTA Affiliates shall adopt bylaws and shall review and submit them to West Virginia PTA every 3 years.
4. PTA Affiliates shall have 5 members to organize a local affiliate and 10 members to sustain good standing status of an existing affiliate.
5. PTA Affiliates shall submit the dues for at least 10 members to West Virginia PTA by October 1 annually.
6. PTA Affiliates shall submit a copy of their financial audit to West Virginia PTA by October 1 annually.

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7. PTA Affiliates are recognized as independent nonprofit tax exempt Associations by the US Internal Revenue Code under section 501(c)3 and West Virginia Tax Department. The proper IRS forms shall be filed on an annual basis as required by current tax law. A copy shall be filed with West Virginia PTA within 30 days of filing with the IRS. Extension requests filed with the IRS shall also be filed with West Virginia PTA.
8. PTA Affiliates shall register with the West Virginia Tax Department as required by West Virginia statutes.
9. PTA Affiliates shall register with the West Virginia Secretary of State's office as required by West Virginia statutes.
10. PTA Affiliates are entitled to state sales tax exemption.
11. PTA Affiliates shall properly utilize, display and incorporate the PTA official logo, tag line and mission statement in conformity with National PTA Guidelines.
12. PTA Affiliates shall pay all outstanding amounts due to West Virginia PTA within 30 days of receipt
13. PTA Affiliates shall be governed by a governing board as specified in their bylaws and shall submit an officers' list annually by July 1.
14. PTA Affiliates shall follow standard, fiscally responsible financial procedures. Procedures shall be available for review upon request.
15. PTA Affiliates shall meet as specified in their bylaws and shall maintain Association documents in accordance with the Records Retention Schedule (National PTA Money Matters) and must be available for review.
16. PTA Affiliates shall maintain a list of members and must be available for review.
17. PTA Affiliates shall be considered in good standing when:
 - A new PTA has 5 members or an existing PTA has 10 members
 - First installment of dues (at least 10 members) is received in the state office by October 1
 - A copy of the yearly audit is received in the state office within 120 days of the fiscal year ending
 - A current copy of the bylaws is submitted every 3 years for approval
 - A copy of the yearly 990 form filed with the IRS within 30 days. Extensions filed with the IRS must be filed with the West Virginia PTA office
 - Proof of general liability and bonding insurance

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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 Local Unit Packet. The packet will contain:

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

Affiliates will receive the rest of the Local Unit Packet once they become in good standing. Affiliates that remain not in good standing will only receive further resources to bring the affiliate current upon request. All affiliates will be allowed to attend regional trainings and will be invited to attend the West Virginia PTA Annual Convention, but may not be voting delegates.

Any affiliate with “good cause” for not being in good standing may contact West Virginia PTA to explain the reasons and will be placed in pending until the situation can be resolved and the required materials are submitted. West Virginia 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. The West Virginia PTA will decide on a case-by-case basis for what a “good cause” for not being in good standing will be.

Affiliates not in good standing on November 1 will receive “Letter A” stating the reason(s) they are not in good standing and will be referred to the Local Unit Services committee for remediation. The West Virginia PTA President will assign a West Virginia PTA board member to contact the affiliate and assist with attaining Good Standing if needed. These affiliates will not receive the Local Unit Packet and will not be eligible for awards. If the bylaws are the only item not in good standing, the affiliate will be eligible for awards if their bylaws are submitted to the West Virginia PTA office for review 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.

Consequences of “Letter B”

Dues – affiliates that have not submitted dues for at least 10 members by the stated deadline will be considered inactive and will have their charter revoked upon approval by the Board of Managers at the July board meeting and will no longer be tax exempt. Affiliates will receive “Letter C” at that time stating that their charter has been revoked and giving directions to either dissolve or to contact West Virginia PTA for help with reinstatement.

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Audit – affiliates that have not submitted the audit of the last fiscal within 120 days of the last fiscal year ending will be subject to a state audit. 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 Managers at their next meeting. Affiliates will receive “Letter C” at that time.

Bylaws – affiliates that had bylaws due before November 1st of the current school year (received “Letters A & B” for their bylaws not being current) 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. Non-compliance within 1 year of the original due date will result in the loss of charter upon approval by the Board of Managers at their next meeting. Affiliates will receive “Letter C” at that time.

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 West Virginia PTA President and Local Unit Services committee. In most cases the president 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 non-compliance of one or more standards of affiliation may result in the loss of Charter.

When the non-compliance is an alleged violation of the National PTA Bylaws, the West Virginia PTA Bylaws or the local affiliate’s own bylaws or other practices or activities that may tend to defeat the Mission and basic policies of PTA, the Local Unit Services Committee will review the alleged violations and will promptly report to the state Board of Managers the results of such review and will present recommendations for action. The West Virginia PTA Board of Managers shall give due consideration to the report of the Local Unit Services Committee and shall accord the local PTA an opportunity to be heard and to respond to the report. If, upon such consideration and hearing, the West Virginia PTA Board of Managers finds a violation by the affiliate, it may, by a two-thirds vote of all its members then in office, require the PTA to take appropriate action within a period of time stipulated by the West Virginia PTA Board of Managers. When such a requirement has been made by the West Virginia PTA Board of Managers and if the recommended action is not taken by the local PTA within the allotted time, the West Virginia PTA Board of Managers 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.