

# CT PTA STANDARDS OF AFFILIATION **2025-2026**

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

| Item                                                                                                                                                                | Format                                                                                                                                                                                                                                                                   | Due to CT PTA Office                                                                                                                                                                                                                                                                                                                                                                                                     | Rationale                                                                                                                                                                                                                                                                                                                                                                                                            |
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| <b>Officers Information</b><br>Date Completed _____                                                                                                                 | Electronic<br>Report officers on our website: <a href="http://www.ctpta.org">www.ctpta.org</a><br>(Follow link to report officers).                                                                                                                                      | <b>By July 1<sup>st</sup></b> Immediately after the election of officers but no later than July 1 <sup>st</sup> .<br>Email CT PTA officer changes throughout the fiscal year.<br>( <a href="mailto:office@ctpta.org">office@ctpta.org</a> )                                                                                                                                                                              | This is required to allow the State & National PTA to communicate with each PTA and the leadership team responsible. <b>Officer's information is required yearly even if there are no changes to officers.</b> Information shared with National PTA.                                                                                                                                                                 |
| <b>Financial Review</b><br>Date sent to CT PTA _____                                                                                                                | Electronic, mail or fax<br>Sample review form available from CT PTA if needed.<br><br><b>REQUIRED FOR INSURANCE</b>                                                                                                                                                      | <b>Due: Close of fiscal year, prior to September 15<sup>th</sup></b><br><u>All PTAs must complete a review of the previous year's financials and send to CT PTA</u><br><br><i>All PTAs are to perform a yearly <u>review</u> of the books. All reviews must be sent to CT PTA, signed by 2 to 3 people who performed the review. The volunteers who review the books cannot have had access to the check book/funds.</i> | <u>Required</u> for bonding insurance and is a good practice to ensure your financial process is sound.<br><br><b>Please note: Insurance</b> fidelity bond coverage <u>requires that monthly</u> bank statements must be reviewed and signed by someone who does not have authorization to sign checks. (Financial software does not qualify under insurance requirements.)                                          |
| <b>Membership Fees</b><br><br><i>Monthly as new dues need to be reported.</i><br><b>*NEW THIS YEAR- NATIONAL PTA DUES INCREASE- DUES NOW \$8.50 PER PAID MEMBER</b> | Electronic via GiveBacks (MH) or<br>Mail CK with Unit Treasurer Report to office<br><br><i>(All forms can be found on our website- PTA Officers- forms. Also available from the state office. Password protected page on our website; contact CT PTA to gain access.</i> | <b>Officers immediately</b> , then fees are submitted <b>monthly</b> when you have new members to report to CT PTA.<br><br>Please note: A minimum of 25 paid PTA members for all PTAs and a minimum of 10 paid PTA members for all SEPTAs must be reported and paid to CT PTA by October 15 <sup>th</sup> which is to include all officers' membership. <i>All Officers must be paid PTA members.</i>                    | Fees provide the State and National PTA with the resources to assist affiliates and advocate for children. Officers need to be paid PTA members immediately to <u>conduct PTA business</u> . Treasurers should submit fees monthly when there are new members to report. All PTAs must have paid members reported by October 15 <sup>th</sup> and then again, every month moving forward as you attract new members. |
| <b>IRS 990- Copy or letter for extension</b><br>Date sent to CT PTA _____                                                                                           | Electronic, mail or fax to CT PTA a copy of your IRS form 990.                                                                                                                                                                                                           | <b>October 31<sup>st</sup></b> Make 3 copies – one for each - IRS, CT PTA, and your PTA files.                                                                                                                                                                                                                                                                                                                           | All PTAs are <b>mandated by the IRS</b> to complete form 990 to maintain non-profit status.<br>The fiscal year ending 6/30- <b>due to the IRS by Nov 15<sup>th</sup> to avoid filing penalties.</b>                                                                                                                                                                                                                  |
| <b>Proof of Insurance</b><br><i>Only for PTAs who do not use AIM-</i><br>Date policy sent to CT PTA _____                                                           | If using AIM insurance as your provider, NO proof is necessary.                                                                                                                                                                                                          | <b>November 30<sup>th</sup></b> <b>This date is for PTAs who do not use AIM Insurance.</b> Any PTA who seeks outside Insurance (other than AIM), please send proof of Insurance to CT PTA via email to <a href="mailto:office@ctpta.org">office@ctpta.org</a>                                                                                                                                                            | Insurance is needed to protect your officer against lawsuits, guard your treasury for loss or theft and provide liability coverage for your events. Applications and renewals will be sent to PTA Presidents in August/September.                                                                                                                                                                                    |
| <b>Bylaws</b><br>Date sent to CT PTA _____                                                                                                                          | Electronic, mail or fax to CT PTA                                                                                                                                                                                                                                        | Bylaws must be reviewed every 3 years not to exceed 5 years.<br><br>Contact CT PTA to receive the most current Model Bylaws.                                                                                                                                                                                                                                                                                             | Bylaws are your PTAs basic governing document. Bylaws must be reviewed on a regular basis, every 3 but no more than 5 years, to ensure accuracy. <i>Prior to the General Membership vote, proposed bylaws are sent to Connecticut PTA office for review. Please send to <a href="mailto:office@ctpta.org">office@ctpta.org</a>.</i>                                                                                  |
| <b>Training for officers Required for all Presidents/Treasurers.</b><br>Date Completed _____                                                                        | Leaders are required to participate in leadership training that has been provided or approved by Connecticut PTA.<br><br><b>Suggested for all Officers</b>                                                                                                               | <b>SUNDAY, SEPTEMBER 7<sup>TH</sup> TRAINING DAY.</b><br>Sheraton Hartford South, Rocky Hill CT<br>Registration will be available on our website.<br><br><i>Training must be completed every year before <b>November 15<sup>th</sup></b>-or within 60 days of taking office.</i>                                                                                                                                         | Training allows for the dissemination of the most current regulations, trends and standards in PTA and parent engagement. We provide Leadership Training yearly which you are encouraged to attend. Council-based training must be approved by Connecticut PTA.                                                                                                                                                      |