

PTA LOCAL UNITS IN GOOD STANDING



WHY DO YOU NEED TO BE A LOCAL UNIT IN GOOD STANDING?

Illinois PTA is the Parent Association for all local units in Illinois. As a local unit you are a subsidiary association covered by the Illinois Congress of Parents and Teachers, original charter from 1900, our tax-exempt status as granted by the Internal Revenue Service and the sales tax exemption from the Illinois Department of Revenue.

Local PTA units enjoy other benefits of being a PTA which includes but is not limited to our many programs and resources, reduced liability insurance premiums, leadership training, and a voice in Springfield as well as Washington, DC.

The term “Local units in Good Standing” is basically the title of a checklist which was adopted to ensure that you have:

- A continuous flow of resources and communication from National PTA, Illinois PTA, your region, and in some cases your district and council; there are many levels of assistance available to you.
- A current up to date self-governance tool which meets the unique needs of the local unit as well as encompassing all the federal requirements of a non-profit organization.
- Assistance in meeting current financial filing requirements for all non-profit organizations with 501 (c) (3) status, both federally and by the state of Illinois.

When following the requirements of the Local Unit in Good Standing Checklist, you are giving yourself some insurance that we as a Parent Association can assist you promptly if you ever need assistance with the IRS or many of the Illinois governmental agencies, such as the Department of Revenue, the Illinois Attorney General and/or the Secretary of State’s office. We can also help you if you have liability issues, monies lost and/or stolen, etc. We are just a phone call away should you have any questions. You have many people you can reach out to starting with your district and/or region directors. You may also contact the state office at 217-523-2811 at any time. We are here to make sure the time and energy you put into PTA provides a fulfilling and worthwhile experience. Have a great year!

PTA LOCAL UNITS IN GOOD STANDING



LOCAL UNIT IN GOOD STANDING CHECK LIST

- Adhere to the Mission, Purposes and Basic Policies of the PTA;
- Observe the Illinois PTA Charter Rules;
- Register the local unit each year using the MemberHub platform. Failure to complete will also prevent the local unit from receiving mailings, until the form is received;
- Remit the first dues payment to the state through MemberHub prior to October 1.
- Audit financial records at least annually and complete the Audit Submission for the prior year through MemberHub prior to December 31.
- Comply with the Internal Revenue Service requirements for nonprofit organizations including filing necessary report forms. And complete the IRS Submission for the prior year through MemberHub prior to December 31.
- Secure liability insurance and complete the Insurance submission through MemberHub or submit a waiver through MemberHub;
- Keep accurate minutes of all board and general meetings in a book with numbered pages;
- Use Illinois PTA procedures and materials to keep accurate and detailed financial records, to adopt an annual budget, fundraise only to fulfill budget requirements;
- Have bylaws reviewed every two years under the direction of the district director or appropriate member of the state board of directors;
- Send all local unit elected officers to the required Illinois PTA leadership courses within time frames prescribed in their local unit bylaws, and attend leadership development programs; also invites general members to do the same;
- Attend council, district and/or region meetings and conferences, and send delegates to the Illinois PTA State Convention and National PTA Convention in accordance with local bylaws