

# 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 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 all federal requirements of a non-profit organization.
- Assistance in meeting current financial requirements for non-profit organizations with 501(c) (3) status, both federally and by the state of Illinois.

Using the Good Standing Checklist on the following pages will help keep your association and Illinois PTA on track and in compliance with state and federal requirements.

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

Using the Local Unit in Good Standing Checklist will help keep your association and Illinois PTA on track and in compliance with state and federal requirements.

- Adhere to the Mission, Purposes and Principles of the PTA
- Observe the Illinois PTA Charter Rules
- Immediately, after elections, register your officers using the Givebacks platform. Failure to complete will prevent the local unit from receiving communications from State and National.
- Remit the first dues payment to Illinois PTA through Givebacks prior to October 1.
- Conduct a review of the financial records following the end of each fiscal year as well as when bank signatures' change.
- Complete the Audit Submission for the prior year through Givebacks prior to December 31.
- Complete and file the appropriate IRS 990 tax return following each fiscal year end. (For most PTAs, the online Form 990-N is all that is needed.)
- Complete the Tax Filing Submission for the prior year through Givebacks prior to December 31.
- Obtain liability insurance.
- Complete the Insurance certificate submission through Givebacks.
- Keep accurate records of all business conducted by the PTA.
- Maintain financial records in a business-like manner.
- Adopt an annual budget. Note: fundraise only to fulfill budget requirements.
- Conduct a bylaws review as requested under the direction of your Illinois PTA Board representative.
- Confirm elected officers attended leadership courses within time frames prescribed in their local unit bylaws, and attend leadership development programs; also invite general members to do the same.

# PTA LOCAL UNITS IN GOOD STANDING



## COUNCIL IN GOOD STANDING CHECK LIST

Using the Council in Good Standing Checklist will help keep your association and Illinois PTA on track and in compliance with state and federal requirements.

- Adhere to the Mission, Purposes and Principles of the PTA
- Observe the Illinois PTA Charter Rules
- Immediately, after elections register your officers using the Givebacks platform. Failure to complete will prevent the local unit from receiving communications from State and National.
- Conduct a review of the financial records following the end of each fiscal year as well as when bank signatures' change.
- Complete the Audit Submission for the prior year through Givebacks prior to December 31.
- Complete and file the appropriate IRS 990 tax return following each fiscal year end.
- Complete the Tax Filing Submission for the prior year through Givebacks prior to December 31.
- Obtain liability insurance.
- Complete the Insurance certificate submission through Givebacks.
- Keep accurate records of all business conducted by the PTA.
- Maintain financial records in a business-like manner.
- Adopt an annual budget. Note: fundraise only to fulfill budget requirements.
- Conduct a bylaws review every two years under the direction of your Illinois PTA Board representative.
- Confirm elected officers attended leadership courses within time frames prescribed in their local unit bylaws, and attend leadership development programs; also invite general members to do the same;