



UNIT AND COUNCIL – STANDARDS OF AFFILIATION CHECKLIST

In addition to the items listed below, local PTAs and councils shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted VAPTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA.

For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a district director.

Upload this form with all required SOA documents in MemberHub or by email to info@vapta.org. Please use this sheet for your own organization resource.

PTA/PTSA/Council Name _____ District _____

Item	Due to VAPTA Office [No later than date provided]	Notes	Responsible PTA Leader	Date Complete
Officer List	June 15	Officer information is submitted every year even if there are no changes.		
Membership List (for local units only)	November 1, December 1, March 1, June 30	Monthly submission starting in August is recommended. Must meet first compliance date, November 1, for good standing.		
Audit	November 15	Refer to VAPTA website for forms.		
IRS 990 Tax Filing	November 15	990N – Accepted confirmation. 990EZ/990 full copy.		
Bylaws Organizational Structure Form	November 15	Bylaws are reviewed annually, and Organizational Structure Sheet submitted.		
Insurance	November 15	Upload declaration page.		

All forms can be found at www.vapta.org. As part of our service to you, all submitted information is kept in the state office in each unit/council's file.

Revised: 7/2021