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# Values the PTA Way - Exploring PTA Values through Standards of Affiliation

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To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

# Objectives

- Provide an understanding of the importance of the association values
- Take a closer look at the Standards of Affiliation Requirements
- Connect the Standards of Affiliation Requirements to association values

## What Are Values and Why are They Important?



## What Are Values and Why are They Important?

- **Guide our decision-making and action**
- **Set expectations**
- **Support our mission**
- **Strengthen our identity**
- **Strengthen relationships**
- **Shape organization culture**

# PTA Values

**Collaboration:** We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.

**Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.

# PTA Values

**Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

**Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.

**Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

# National PTA Standards of Affiliation (SOA)

The **National PTA Standards of Affiliation (SOA)** is a policy of the **National PTA Board of Directors** that defines the relationship between the state constituent associations and National PTA, including what National PTA will provide to those associations. The policy sets the standards for a successful state constituent association; protects the National PTA name, identity, and brand; and ensures that all will be treated fairly and equally.

Standards of Affiliation [webpage](#)



# National PTA Standards of Affiliation (SOA)

## **Policy consists of four components**

[SOA Policy Document](#)

[SOA Requirements \(14\) - Resource A](#)

[Procedures Regarding Non-Compliance - Resource B](#)

[Memorandum of Understanding - Resource C](#)

[Key resources](#)

## Privileges of Affiliation with National PTA



# National PTA SOA Requirements

## Consists of Five Areas

- **IRS Requirements**
- **Financial Requirements**
- **State Constituent Requirements**
- **Nonprofit Organization Requirements**
- **Affiliation Requirements**



# National PTA SOA Requirements

- IRS 990
- Financial Review
- Incorporate PTA in the association name
- Board of Directors
- Bylaws
- Memorandum of Understanding
- Protect the PTA Brand
- Adhere to the vision, mission, values and policies
- Branding Policies and Guidelines
- Prioritize Membership
- Membership Dues Report
- Prioritize Diversity, Inclusion and Outreach
- Constituent associations and officers' information
- Board Training

# National PTA SOA Requirements

**The SOA Requirements provide a road map to help state PTA leaders track submissions and inform their boards of the current compliance status.**

**The PTA Values are the compass that will guide state PTAs through the process.**



# Collaboration





**Commitment**

# Diversity





Respect

# Accountability



**State PTA Associations establish Standards of Affiliation, which also may be known as Compliance or Good Standing requirements for constituent associations.**



Uniting us  
all



