Oregon PTA Bylaws require local PTAs to submit documents each year in order to be in compliance with the Oregon Department of Justice, Internal Revenue Service, and your liability insurance carrier. This is known as Unit in Good Standing (UGS).

This is a list of the required documents:

- Officers List – input your current Officer List online at the Oregon PTA website.
- Membership input online directly on the Oregon PTA website and dues paid – due monthly by the last day of each month. All officers and committee chairs are required to be members of their local unit by November of the year in which they serve. Initial membership for the year is due by November 30th. Membership lists must be submitted, and National and State dues paid for all current and past unpaid members within the last 5 years. Lists and dues are to be submitted thereafter monthly.
- 2022-2023 Financial Audit
- IRS 990/990EZ/990N – Due to IRS by the 15th of the 5th month after the last day of the fiscal year. (Nov. 15th.) A copy must be submitted to Oregon PTA by November 30th.
- Copy of CT-12 - Due to Oregon DOJ by November 15th; a copy sent to Oregon PTA by November 30th.
- Current Year’s Standing Rules (approved by your general membership)
- Copy of your Annual Budget (approved by your general membership)
- Liability Insurance Payment – Paid directly to AIM
- Training Credits: Each unit needs a total of 3 credits for UGS. If you still need training credits, you can visit National PTA at pta.org and take the E-Learning courses from National PTA. Please see the 2023 Oregon PTA training requirements listed below for specific courses that are required.

2023 Oregon PTA Training Requirements

Please access the classes listed below and provide documentation of completion to receive your credit. Each leader completing National PTA e-learning needs to complete 6 classes.

**ALL 4 Required:**

- **Local PTA Budget Basics:** This course will provide you with a short guide to specific budgetary duties and responsibilities that are needed to fulfill the requirements of a local PTA (approximately 10 minutes).
- **Thrive: PTA All Leader Training- Parliamentary Procedure:** learn how following Roberts Rules of Order can lead to a cohesive, inclusive, and productive meeting (approximately 30 minutes).
- **Preventing Theft in Your PTA:** Learn how to detect theft in your PTAs and what to do if you suspect it is happening (approximately 30 minutes).
• **Thrive: PTA All Leader Training- Conflict Management:** In this course you will learn how to improve your communication through utilizing active listening skills and proactive problem solving as a team *(approximately 30 minutes).*

**Your Choice- (choose 2 classes to complete):**

• **Local PTA President Roles & Responsibilities:** An introduction to the roles and responsibilities of the local PTA president.

• **Local PTA Treasurer:** An introduction to the roles and responsibilities of the local PTA treasurer.

• **Local PTA Board Basics – Structure, Roles & Responsibilities:** Learn the basic governance structures behind most PTA units *(~30 minutes).*

• **Taking & Approving Meeting Minutes:** A brief guide on how to properly take meeting minutes for any Local PTA Secretary *(~10 minutes).*

• **Membership 101: Design Your Membership P.L.A.N.:** During this course you will learn how to **P.L.A.N.: Picture, Listen, Ask, and Nurture** your potential and returning PTA members. When you complete this course, you will be able to print a completed Membership Plan tailored to your PTA’s needs in your area *(~20 minutes).*

• **Transformative Family Engagement:** Engaging and empowering families is at the heart of PTA’s mission. But how do you do it? Take this course to identify practical ways your PTA and school can engage families in more meaningful ways *(~45 minutes).*

• **Effective Advocacy for Your Child:** Organize around local issues and address them to benefit the needs of children and your community. This course is designed for emerging local leaders, but all are welcome to attend *(~30 minutes).*

• **Planning Your PTA Year:** Learn to keep volunteers motivated by putting an achievable plan together for the year *(~30 minutes).*

You should be uploading items directly to your Oregon PTA dashboard by logging in using your National PTA ID # and your password. You can also mail documents to the Oregon PTA Office, you do not need to do both, just online or hard copy via mail.

If you are having trouble uploading anything to OregonPTA.org, or have other questions, please contact our office at office@oregonpta.org or call 503-234-3928.

You no longer need to send proof of your E-learning to Oregon PTA. We are able to track that through the National PTA portal.