

ATPE Operational Standards

Approved by the ATPE Board of Directors on May 19, 2018

For chartered ATPE Local Units

ATPE's Board of Directors, as authorized by the ATPE House of Delegates, has adopted a set of charter standards that define the relationships between the state entity (ATPE) and its chartered entities (local units and regions). The charter standards, known as the State-Local Unit Charter Agreement, outline the expectations and requirements for both parties, and specifically address the operational and financial obligations an ATPE entity must agree to follow as a condition of affiliation.

This Local Unit Operational Standards document is an ancillary document to the ATPE State-Local Unit Charter Agreement as approved by the ATPE Board. The operational standards listed below apply to all chartered and active ATPE local units as a condition of maintaining said charter as outlined in the ATPE State-Local Unit Charter Agreement.

Each operational standard listed includes a short explanation of the standard.

Standards based on IRS requirements are designated (IRS) and marked with a red arrow. 

Questions? Please call ATPE at (800) 777-2873.

- a) Local units with fewer than 200 members must maintain a minimum of three active local unit officers. Local units with more than 200 members must maintain a minimum of four active local unit officers. Local units must have a president and a treasurer. The president and treasurer must not be related parties, either by blood or by law (husband/wife, brother/sister, parent/child).**

Explanation: ATPE's local units require a committed group of volunteers to serve as local unit officers. A local unit with 200 or fewer members must have at least three active local unit officers, and one of those officers must have the responsibility of managing the local unit's finances. Local units with more than 200 members must maintain at least four active officers, with one being assigned the responsibility of managing the local unit's finances. Additionally, no local unit can have a president and treasurer who are related by blood or by law.

- b) Local units must send one or more delegates to the ATPE House of Delegates at the ATPE Summit at least once every three years or face a reduction in their annual rebate.**

Explanation: The ATPE State Bylaws stipulate that the primary functions of a local unit are to recruit members, participate in the annual House of Delegates meetings, and to represent the members within the local unit's school district. ATPE provides each active local unit with a 2.5% annual dues rebate that is to be used to fulfill the primary functions. A local unit that does not send a representative to the House of Delegates at least once every three years will have their annual rebate reduced by 1/2 percent annually until such time as the local unit sends a representative to the House of Delegates.

- c) **Local units must submit their annual officer and campus representative lists to the state office no later than June 1 each year.**

***Explanation:** ATPE distributes membership recruitment materials each summer to our active local units to facilitate back-to-school member recruitment. The materials are mailed either to a local unit's officers or to the local unit's campus representatives who are listed in the ATPE database. To facilitate the delivery of these materials, ATPE needs to know the names and addresses of the volunteers within each local unit. Requiring local units to provide updated volunteer leader lists by June 1 each year enables the state to send materials to the right people. Local units that do not meet this standard will be placed on a watch list and may be deactivated.*

- d) **Local units that adopt amendments to their local unit bylaws must submit a copy of the revised bylaws to the state office no later than two weeks following the meeting at which the amendments were adopted.**

***Explanation:** A local unit's bylaws reflect the will of the members within that local unit, and they provide guidance to a local unit's officers about how to conduct local unit business. Local units must follow the amendment process outlined in their local unit bylaws. Once an amendment is adopted, a revised set of bylaws must be sent to the state office within two weeks so that the state office can update its files. ATPE's state office often receives calls from leaders and members with questions about officer roles, elections, and governance, and having an updated set of bylaws for each local unit greatly facilitates ATPE's ability to respond to questions that are posed. Local unit dues are collected and transferred to the local unit's account according to the information in the most current bylaws document on file.*

- e) **Local units that expend funds through a scholarship program must have the program reviewed and approved by the state office prior to its implementation.**
(IRS)



***Explanation:** ATPE does not prohibit its local units from using a portion of their annual revenue to fund a scholarship program. Scholarship programs properly implemented can bring welcome PR to a local unit. However, scholarship programs administered improperly can damage a local unit's tax status as the IRS has clear and strict rules that govern the administration of a scholarship program. Any local unit that wishes to maintain a scholarship program must have the program approved by the state office. The local unit rebate may be withheld until such time as the scholarship program is submitted for approval and deemed compliant.*

- f) **Local units must conduct a minimum of one official meeting per year and must conduct an election of officers each year.**

***Explanation:** ATPE's local unit bylaws stipulate that a local unit must plan for at least one meeting and one election per year. Meetings are great opportunities to address issues within the school district, identify new leaders and volunteers, and say hello to old friends—and make new ones! When and where to have the meeting and how to conduct*

the election are decisions to be made by the local unit leadership and guided by the requirements outlined in the local unit bylaws. Meetings can either be held as a traditional meeting or can be online or via phone conference, and elections can be conducted electronically.

- g) Local units that collect membership applications must submit the applications to the state office once every two weeks in order to ensure timely processing of the applications and activation of member benefits.**

***Explanation:** An educator recruited to join ATPE by a local unit officer or campus representative becomes a member the moment the ATPE local unit representative signs and dates the member's application. That means the member can begin accessing ATPE benefits and services immediately, but their access may be limited if the state office does not have record of their membership. It's important that all membership applications received by a local unit representative be sent to the state office within two weeks so that the memberships can be activated and members can begin utilizing ATPE's services as quickly as possible. Local unit representatives are encouraged to use certified mail when submitting member applications. The cost of the certified mailing can be paid by the local unit and should be listed on the local unit's financial reports.*

- h) Any member who believes that financial malfeasance may have occurred must immediately report the possible malfeasance, along with any documentation that supports the suspected malfeasance, to the state office.**

***Explanation:** All ATPE volunteer leaders have a fiduciary responsibility to properly spend—and account for—their members' dues dollars. Every ATPE local unit is funded either through a rebate of members' dues or the collection of local unit dues, and the essence of being a good fiduciary is to always remember that, as a volunteer, you are responsible for other people's money. If a local unit or region officer or a member believes that a fiduciary responsibility has been violated, it is the member's obligation to promptly raise their concern to the state office so that the issue can be investigated and, if necessary, addressed.*