

ATPE Region Operational Standards

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

This Region Operational Standards document is an ancillary document to the ATPE State-Region Charter Agreement as approved by the ATPE Board. The operational standards listed below apply to all ATPE regions. Standards based on IRS requirements are designated **(IRS)** and marked with a red arrow. 

Each operational standard listed includes a short explanation of the standard, along with links to documents and/or training that will help all ATPE regions implement the standards.

- a) **Regions shall maintain an officer corps as outlined in the state bylaws, with additional officer positions as authorized by the region's bylaws. Regions must have a president and a treasurer who are not related parties, either by blood or by law (husband/wife, brother/sister, parent/child).**

Explanation: ATPE's region officer positions are outlined in the ATPE state bylaws, Article VIII, Section 3. Additionally, no region can have a president and treasurer who are related by blood or by law.

- b) **Regions must submit their annual officer list to the state office no later than June 1 each year.**

Explanation: ATPE communicates important information to its region officers on an ongoing basis. To ensure that the right information is communicated to the right people, it is important that ATPE have an up-to-date list of region officers.

- c) **Regions that adopt amendments to their region 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 region's bylaws reflect the will of the members within that region, and they provide guidance to a region's officers about how to conduct region business. Regions should follow the amendment process outlined in their bylaws, and 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 region officer roles, elections, and governance, and having an updated set of bylaws for each region greatly facilitates ATPE's ability to respond to questions that are posed.

- d) **Regions 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 regions from using a portion of their annual revenue to fund a scholarship program. Scholarship programs properly implemented can bring welcome PR to a region. However, scholarship programs administered improperly can damage a region's tax status, as the IRS has clear and strict rules that govern the administration of a scholarship program. Any region that wishes to implement a scholarship program must first have the program approved by the state office.

- e) **Regions must conduct a minimum of one official meeting per year and must conduct an election of officers each year in coordination with the state association.**

Explanation: ATPE's state bylaws Article VIII, Section 8 stipulates that a region must plan for at least one meeting and one election per year. Meetings are great opportunities to address issues within the region, identify new leaders and volunteers, recognize those local units within the region that have experienced success, 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 region leadership that is guided by the requirements as outlined in the region bylaws. Meetings can either be held as a traditional meeting or can be online or via phone conference, and elections can be conducted electronically.

- f) **Any member who believes that financial malfeasance may have occurred at the region level 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 region is funded through a rebate of members' 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 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.