

NEW MEXICO CONGRESS OF PARENTS AND TEACHERS

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STANDARDS OF AFFILIATION

Please read the following list of criteria required to be in compliance with New Mexico PTA and to retain a 501(c)(3) nonprofit, tax-exempt status with the IRS. Failure to comply with these requirements may result in disbandment by NMPTA. All documents should be submitted and tracked through your PTA's Givebacks account.

Each local PTA shall:

- ❑ **Always** adhere to the purposes and basic policies of NMPTA and National PTA as stated in your local PTA bylaws.
- ❑ **Hold at least 3 general meetings per year.** Refer to your bylaws for the timing and purposes of these meetings.
- ❑ **Review and update your local PTA bylaws** at least every 3 years. You may obtain a copy of the most recently approved version of your local PTA bylaws from NMPTA at any time.
- ❑ **Using your PTA's Givebacks account, remit monthly** state and national portions of dues to NMPTA - **along with a list** of member names and **email addresses (also submitted through Givebacks).** (*Dashboard > Memberships > Remit State Dues*)

By September 30th:

- ❑ Update your **Officer List** in Givebacks and **update it as needed throughout the year.** (*Dashboard > Compliance > Update Officers*)
- ❑ Submit a **current year operating budget** immediately, upon approval by the local PTA's members, to NMPTA through Givebacks. (*Dashboard > Compliance > Enter Submissions*)
- ❑ Submit a **previous fiscal year proof of internal financial review** to NMPTA through Givebacks. This form may be found in the "For PTA Leaders" section on the NMPTA website. (*Dashboard > Compliance > Enter Submissions*)
- ❑ Submit a copy of your current **Insurance Policy** coverage to NMPTA through Givebacks. (*Dashboard > Compliance > Enter Submissions*)
- ❑ EACH elected officer must complete one **Thrive course**, which is offered through National PTA at <https://thrive.pta.org/>. **Certificates of completion for the Thrive courses** should be submitted through Givebacks. (*Dashboard > Compliance > Enter Submissions*)

By November 30th:

- ❑ Send a copy of your **IRS Form 990/990EZ** receipt to NMPTA through Givebacks after filing with the IRS no later than **November 15th**. This filing is required for the **previous fiscal year** by the IRS. (*Dashboard > Compliance > Enter Submissions*)

PLEASE KEEP THIS DOCUMENT FOR YOUR RECORDS

Your PTA Secretary should file a copy of this document with the fall meeting minutes. Each member of your PTA's Executive Committee should be aware of the annual requirements of NMPTA.

Visit www.newmexicopta.org "For PTA Leaders" area to download forms. The password to access is: everychild.

Updated July 16, 2024