

MONTANA PTA COMPLIANCE REQUIREMENTS

For a local PTA/PTSA unit to be in “good standing” it must:

- Comply with National PTA Bylaws, Montana PTA Bylaws, and the Uniform Bylaws for Local Units.
- Adhere to the PTA Vision, Mission, Values, Purposes and basic policies of the PTA.
- Submit appropriate membership data and dues in November and April to Montana PTA via **Givebacks**.
- Remit required liability insurance premium to AIM Insurance and upload/record as completed in **Givebacks** by May 1st.
- File the appropriate 990-N, 990-EZ, or 990 Federal Tax Return on an annual basis at fiscal year-end and upload/record as completed in **Givebacks**.
- Submit officers to Montana PTA via **Givebacks** in June (or when your unit’s annual elections take place) and update when changes/elections occur throughout the year.
- Upload the Local Unit Standing Rules to Montana PTA via **Givebacks** on an annual basis.
- File annual Corporate Renewal with Secretary of State by April 15th and upload certification letter in **Givebacks**.
- Conduct an annual financial review of the local unit’s financial records and upload in **Givebacks** following your fiscal year-end.