

# 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. *Uniform Bylaws for Local Units are bylaws/rules that apply to all units in Montana. The Bylaws provide the basic organizational structure of the local unit. The standing rules provide the nuts and bolts of how things are done within each unit. If ever a conflict between the standing rules and Bylaws, the Bylaws come first and have the final word.*
- Adhere to the PTA Vision, Mission, Values, Purposes and basic policies of the PTA. *As a non-profit, you must follow our Mission. Spending money in ways that doesn't fall under our Mission is jeopardizing your non-profit status.*
- Submit appropriate membership data and dues in November and April to Montana PTA via **Givebacks**. *Montana PTA has monthly expenses and membership dues from our local units is our only income. We require dues to be submitted in November and April for our cash flow in office, however, we will always accept dues any time of year. We are to report to NPTA monthly whether or not we receive dues from our local units.*
- Remit required liability insurance premium to AIM Insurance and upload/record as completed in **Givebacks** by May 1st. *Your PTA is responsible for its actions. When an accident occurs, there is a risk that your PTA (and possibly its directors and officers) will be named in a lawsuit. By obtaining insurance, your PTA can protect its assets from the costs of defending against a lawsuit or having to pay an adverse judgement. The MT PTA requires each PTA unit to obtain general liability insurance through the statewide insurance coverage plan coordinated by the MT PTA office. The yearly premium is due to AIM Association Insurance Management by May 1<sup>st</sup> when the renewals are sent out for the upcoming coverage year. AIM; 1-800-876-4044.*
- 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**. *Every year each PTA must file form 990 with the IRS to maintain 501(c)(3) non-profit organization status.*
- 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. *In order for Montana PTA to contact local unit leaders when needed.*
- Upload the Local Unit Standing Rules to Montana PTA via **Givebacks** on an annual basis. *With a copy of your standing rules, we can help new board members get started and if any issues come up, we can refer to the standing rules we have on file and assist individual local units and answer particular questions.*
- File annual Corporate Renewal with Secretary of State by April 15th and upload certification letter in **Givebacks**. *In order to maintain your status as a non-profit corporation, you must file an annual report with the Secretary of State. If you do not file the annual report in a timely manner, your PTA can be dissolved by the SOS, meaning that you will no longer be a nonprofit corporation. MT PTA required every local unit to incorporate as a non-profit corporation so that even if individuals such as its officers decide to move on, the organization itself will continue on to serve the purposes for which it was formed.*
- Conduct an annual financial review of the local unit's financial records and upload in **Givebacks** following your fiscal year-end. *An annual review of the financial books and records of your PTA is required by the Uniform Bylaws. One of the most important responsibilities of your PTA is to assure itself and the membership that the finances have been properly handled.*