

NEW MEXICO CONGRESS OF PARENTS AND TEACHERS

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STANDARDS OF AFFILIATION

REQUIREMENTS TO MAINTAIN UNIT COMPLIANCE & TAX EXEMPT STATUS

Local PTA Unit Leaders,

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. Failure to comply with these requirements may result in disbandment by the NMPTA.

Each local PTA unit shall:

- ☐ **Always** adhere to the purposes and basic policies of NMPTA as stated in your local unit bylaws;
- ☐ **Hold at least 3 general meetings per year.** The purpose of these meetings shall include the following:
 1. Approval of the budget at a **fall general meeting**.
 2. Electing the nominating committee at a **winter general meeting**.
 3. Electing officers at a **spring general meeting**.
- ☐ **Review your local unit bylaws** at the start of the fiscal year and submit changes to the NMPTA as needed or when requested by the NMPTA Bylaws Committee. You may obtain a copy of the most recently approved version of your local unit bylaws from the NMPTA at any time;
- ☐ **Remit monthly state and national portions of dues to NMPTA - \$5.50/member (\$3.25 State, \$2.25 National) along with a list of member names and email addresses by completing the Dues Payment and Reporting Forms provided by the NMPTA.**

By September 30, 2016:

- ☐ Submit a complete **Officer List** to the NMPTA and **update it as needed**;
- ☐ File a **2016-2017 operating budget**, immediately upon approval by the unit's members, with NMPTA;
- ☐ File a **2015-2016 fiscal year-end proof of audit** with the NMPTA;

By October 30, 2016:

- ☐ File a copy of your **Insurance Policy** coverage with the NMPTA;

By November 30, 2016:

- ☐ File a copy of your **IRS Form 990/990EZ** with the NMPTA office required for the **2015-2016** term, after filing with the IRS no later than **November 15th**.

PLEASE KEEP THIS DOCUMENT FOR YOUR RECORDS

Visit www.newmexicopta.org Members Only Area to download forms