

Affiliation Report Due October 31

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LouisianaPTA.org/affiliation

All nonprofits have obligations with the IRS, NPTA, and LAPTA. LAPTA works to keep the local PTA's from losing their nonprofit status. Without the nonprofit status, PTAs would owe income tax to the IRS on all of the PTA's income. To file the Affiliation report, log into the PTA's **npo.Givbacks.com account**. On the left menu, select Compliance>Submit Forms to view the seven forms. Click the blue *Submit Form* button for each form and enter the information.

1. **Membership & Officer Requirements:** Enter the current number of memberships, student population, and teacher and admin total. Confirm that officers are registered on Givebacks and have completed 4 credits of training.
2. **IRS Tax Form 990:** Submit proof of 2023 or 24 filed and accepted IRS Form 990. LAPTA reports to the IRS which PTAs are exempt from federal income tax. See **LouisianaPTA.org/treasurer**. Filings are due to IRS by November 15.
3. **Bylaws:** Submit the Bylaws file. Bylaws expire every 3 years. Read your Bylaws, especially Termination of Membership, term for officers, Board and General Membership Meeting requirements, and Standing and Special Committees. The template, directions, and sample timeline are at **LouisianaPTA.org/bylaws**.
4. **Budget Report:** Submit the approved Annual Budget and enter other details. The budget needs to include *Start Up Funds* with amounts listed as an expense and income for a net \$0 effect on the budget.
5. **Audit Report:** Enter the Audit Committee Report findings for each line which is in the Treasurer Toolkit.
6. **LA Secretary of State Annual Filing:** Submit the updated Annual Report from LA Secretary of State (geauxbiz.com) which requires all nonprofits to file annually and pay the \$10 renewal fee (plus a \$5 credit card fee or checks are free). Confirm that the report says you are "In Good Standing." Know when your Annual Report expires.
7. **Insurance:** Submit the insurance declaration page and enter the policy expiration date. LAPTA requires all PTAs to obtain adequate insurance protection from any insurance company, such as Association Insurance Management (AIM) at AIM-companies.com or RV Nuccio at rvnuccio.com.

Retention Phase

If the Affiliation Report is not submitted, then the PTA enters the Retention Phase.

1. Notification: LAPTA gives 30 days to submit the missing items and a new deadline.
2. Restriction: Given a second 30-day period; not eligible for awards, programs, or grants by LAPTA or NPTA.
3. Intervention: After 60 days, the PTA signs a Plan of Action which designates new deadlines.
4. Restructure: LAPTA may choose to restructure the PTA leadership or move into the Dissolution Phase.
5. Dissolution: Loss of the 501(c)(3) nonprofit status if Active Affiliation is incomplete for three consecutive years, if PTA leadership refuses to implement the Plan of Action, or if the PTA opposes the Purposes and Principles of PTA.

The screenshot shows the Givebacks website interface. On the left is a blue sidebar with a menu. The 'Compliance' item is highlighted with a yellow arrow. The main content area is titled 'Submit Forms' and shows a table of required forms for the year 2025-2026. The table has columns for Name, Due Date, and Status. Each row represents a form with a 'Submit Form' button. The forms listed are: Membership Dues and Officer Requirements, IRS Form 990 Filing, Bylaws, Budget Report, Audit Report, Secretary of State Annual Filing, and Insurance. All due dates are 10/31/25.

Name	Due Date	Status
Membership Dues and Officer Requirements	10/31/25	Submit Form
IRS Form 990 Filing	10/31/25	Submit Form
Bylaws	10/31/25	Submit Form
Budget Report	10/31/25	Submit Form
Audit Report	10/31/25	Submit Form
Secretary of State Annual Filing	10/31/25	Submit Form
Insurance	10/31/25	Submit Form