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FLORIDA PTA LOCAL UNIT COMPLIANCE REQUIREMENTS & STANDARDS OF AFFILIATION SCHEDULE AND DUE DATES

To ensure that your local unit PTA/PTSA remains in good standing and in compliance with Florida PTA and the IRS, and to continue affiliation with the Florida PTA, you are **REQUIRED** to complete **ALL five** of the following items by the dates indicated. Because the due dates vary, keep this list in your procedure book to use as a checklist to assist your unit to meet these deadlines. All PTA forms are available online at www.FloridaPTA.org under the “PTA Leaders Tab” - Local Unit Compliance. If you have questions, please email: compliance@floridapta.org

These compliance requirements must be sent to Florida PTA by the due date set out below via:

Email	See special email address for each item below.
FAX	407-240-9577
Mail	Florida PTA 1747 Orlando Central Parkway Orlando, FL 32809

Item	Due to Florida PTA Office	Format Sent	Notes
Local Unit New & Returning Officer Contact Information	July 1st Annually (Immediately after elections)	Enter Information ONLINE Only www.FloridaPTA.org President must maintain current home addresses, phone numbers, and email addresses for all officers.	Must submit new registration every year even if there are no changes in officers' information. Update information throughout the year when changes occur.
Membership Dues State & National Portion of Membership Dues. Pay \$3.50 per membership sold.	Monthly as dues are collected	Pay Via Givebacks site Or USPS Mail: Send with State & National Dues Payment Form from the website www.FloridaPTA.org	The State & National portion of dues are paid monthly when memberships are sold. Dues must be received by Dec. 15 for eligibility to participate in Reflections and other programs.
Audit Financial Review Completed after June 30 each year.	August 31st Annually	Upload on the Givebacks site or Fax, mail, email to: audit@floridapta.org	Refer to Florida PTA Kit of Materials Dollar\$ & \$en\$e Financial Guide and Best Practices for PTAs.
Copy of IRS 990 Due to IRS by Nov 15th each year.	November 30th Annually	Upload on the Givebacks site or Fax, mail, email to: 990@floridapta.org	All PTAs/PTSAs are required to file IRS Form 990 by Nov. 15 annually. File either 990N (e-Postcard), 990EZ (short form) or 990 (long form).
Bylaws	Every Three Years (Minimum)	The Bylaws form and to upload on our website www.floridapta.org , PTA Leaders Tab - Local Unit Compliance. Upload, Fax, Mail or email: bylaws@floridapta.org	Bylaws must be reviewed/updated and Stamped APPROVED by the State Office at a minimum of every 3 years. Update on current bylaws form. [1/28/2024]

As a 501(c)(3) non-profit parent organization, Florida PTA is required by the IRS and federal and state laws to have these compliance documents and information listed above for each subordinate PTA/PTSA unit on their Group Exemption List, GEN 2149.

By meeting these requirements on the due dates specified, your PTA will not only remain in good standing, but your unit will also be eligible for National PTA and Florida PTA awards and participation in other PTA programs such as Reflections and Scholarship. **The IRS imposes fines and penalties for exempt organizations that do not comply with annual 990 Federal Income Tax filing requirements, regardless of whether or not they have a parent organization.**

Numerous local units have been able to refute an IRS fine or penalty because the Florida PTA office was able to produce the required document(s) that a local unit was unable to locate. If you have any questions regarding compliance, please contact Florida PTA by email compliance@floridapta.org or call 407-855-7604.

www.FloridaPTA.org

★ A copy of this document should remain in the President's, Treasurer's, and Secretary's procedure book.

[Revised 6-2024]