

**FLORIDA PTA LOCAL UNIT
COMPLIANCE SCHEDULE AND DUE DATES**

To maintain your local PTA/PTSA's good standing and compliance with both Florida PTA and the IRS, and to ensure continued affiliation with the Florida PTA, you are required to complete all the following five compliance items by their respective due dates. Because deadlines vary throughout the year, we recommend keeping this list in your procedure book and using it as a checklist to ensure timely submissions and uninterrupted affiliation.

All required PTA forms and detailed instructions are available at:

 www.FloridaPTA.org → PTA Leaders Tab → Local Unit Compliance

If you have any questions or need assistance, please contact the Compliance Team at:

 compliance@floridapta.org

Item	Due to Florida PTA Office	Format Sent	Notes
Local Unit New & Returning Officer Contact Information	June 15 Annually (or immediately after elections)	Enter information on the Givebacks site, you will need the home address, phone number, and email address 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 \$4.50 per membership sold.	Monthly as dues are collected	Pay via Givebacks site or mail with <i>Dues Payment Form</i> to Florida PTA, 1747 Orlando Central Pkwy, Orlando, FL 32809	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 31 Annually	Upload on the Givebacks site or mail to Florida PTA, 1747 Orlando Central Pkwy, Orlando, FL 32809	Refer to Florida PTA Kit of Materials Dollar\$ & Sen\$e Financial Guide and Best Practices for PTAs.
Copy of IRS 990 Due to IRS by Nov 15 th each year.	November 15 Annually	E-file with the IRS by Nov 15 AND upload a copy on the Givebacks site or mail to Florida PTA, 1747 Orlando Central Pkwy, Orlando, FL 32809	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	Upload on the Florida PTA website at PTA Leaders Tab - Local Unit Compliance or email: bylaws@floridapta.org	Bylaws must be reviewed/updated and Stamped APPROVED by the State Office at a minimum of every 3 years.

As a 501(c)(3) nonprofit, Florida PTA is legally required by the IRS and state law to collect compliance documents from each PTA/PTSA unit under our Group Exemption (GEN 2149). We also collect and maintain these records to assist our local units. Many times, Florida PTA has helped local units avoid IRS fines by providing backup documentation.

Meeting the listed requirements by their deadlines ensures your unit stays in good standing, remains eligible for National and Florida PTA programs (like Reflections and Scholarships), and avoids potential IRS penalties for missing 990 filings.

If you have questions, contact us at  compliance@floridapta.org or  407-855-7604.

www.floridapta.org

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