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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 the following five 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](http://www.FloridaPTA.org) under “Running Your PTA” – “Forms” tab. If you have questions, please send email to: [compliance@floridapta.org](mailto:compliance@floridapta.org)

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

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

<b>Item</b>	<b>Due to Florida PTA Office</b>	<b>Format Sent</b>	<b>Notes</b>
<b>Local Unit New &amp; Returning Officer Contact Information</b>	<b>July 1<sup>st</sup></b> (or as soon as elections are held)	<b>Enter Information ONLINE Only</b> <a href="http://www.FloridaPTA.org">www.FloridaPTA.org</a> President must maintain current home addresses, phone numbers & email addresses for the officers.	Must submit new registration every year even if there are no changes in officers’ information. Update information throughout the year when changes occur.
<b>Membership Dues</b> State & National Portion of Membership Dues. Pay \$3.50 per membership sold.	<b>Monthly</b> as dues are collected	<b>Mail Only</b> Send with State & National Dues Payment Form from the website <a href="http://www.FloridaPTA.org">www.FloridaPTA.org</a>	The State & National portion of dues is paid monthly when memberships are sold. Must be received by Dec. 15 to participate in Reflections and other programs.
<b>Audit</b> Completed after June 30 each year.	<b>September 30<sup>th</sup></b> <b>Annually</b>	Fax, mail or email: <a href="mailto:audit@floridapta.org">audit@floridapta.org</a>	Refer to Florida PTA Kit of Materials Dollars & Sense and National PTA Money Matters Guide
<b>Copy of IRS 990</b> Due to IRS by Nov 15 <sup>th</sup> each year.	<b>November 30<sup>th</sup></b> <b>Annually</b>	Fax, mail or email: <a href="mailto:990@floridapta.org">990@floridapta.org</a>	<b>All PTAs/PTSAs are required to file IRS 990 by Nov. 15 annually.</b> File either 990N (e-Postcard), 990EZ (short form) or 990 (long form).
<b>Bylaws</b>	<b>Every Three Years</b>	Upload, Fax, Mail or email: <a href="mailto:compliance@floridapta.org">compliance@floridapta.org</a> Bylaws form and link to upload on our website <a href="http://www.floridapta.org">www.floridapta.org</a> , Running Your PTA -- Bylaws Tab	Bylaws must be reviewed, updated and <b>APPROVED at State Office</b> at a minimum of every 3 years. Update on current 2018-2019 bylaws form.

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 awards and participation in PTA programs such as the 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](mailto:compliance@floridapta.org) or call 407-855-7604 or 1-800-373-5782.

[www.FloridaPTA.org](http://www.FloridaPTA.org) – 2018-2019

★ A copy of this document should remain in both the President’s and Treasurer’s procedure book.