



FLORIDA PTA LOCAL UNIT STANDARDS OF AFFILIATION

Compliance Requirements

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 Florida PTA, you are **REQUIRED** to complete the following items by the dates indicated. Because the due dates vary, you may keep this form in your procedure book to use as a checklist to assist your unit in meeting the standards of affiliation.

These required items may be sent by: **email (email addresses indicated below), or by mail to: 1747 Orlando Central Parkway, Orlando, FL 32809, or fax to: 407-240-9577**, by the due date set out below. All PTA forms are available online at **www.FloridaPTA.org**.

Item	Due to Florida PTA Office	Format Sent	Date Sent To Florida PTA	Notes
Local Unit New & Returning Officer Contact Information	July 1 st (or as soon as elections are held)	ONLINE only – www.FloridaPTA.org President must maintain current email address		Must have new registration every year even if there are no changes in officers' information.
Membership Dues (For PTA/PTSA local units only)	Monthly as dues are collected, Final Payment is due by 5/1/2016	Mail (Send with Dues Payment Form from the website.)		Send \$3.50 per member – (The State & National portion of membership dues.)
Audit / Financial Review as of June 30 each year.	September 30 th	Fax, mail or email audit@floridapta.org		Refer to Dollars & Sense and National PTA Money Matters Guide
Copy of IRS 990 (Due to IRS by Nov 15 th each year.	November 30 th	Fax, mail or email 990@floridapta.org		All PTAs/PTSAs are required to file an IRS 990 each year. File either 990N, 990EZ or 990 (long form).
Bylaws	Every three years	Upload bylaws online on www.floridapta.org Running Your PTA Bylaws Tab – or Fax, mail or email to compliance@FloridaPTA.org		Bylaws must be reviewed, updated and APPROVED at State Office at a minimum of every 3 years.

As a 501(c)(3) non-profit parent organization, Florida PTA is required by federal and state laws to have these documents and information listed above for each of their subordinate local units and county councils. By meeting these requirements on the due dates specified, you'll not only remain a PTA unit in good standing, but your unit will also be eligible for awards and participation in the Reflections and Scholarship programs. The IRS can impose fines and penalties for those group(s) or individuals that do not comply with their annual filing requirements, regardless of whether they have a parent organization or not. Numerous 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 please contact Florida PTA by email **info@floridapta.org** or call 407-855-7604 or 1-800-373-5782.