

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 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 these compliance requirements. All PTA forms are available online at www.FloridaPTA.org. If you have questions, please email: compliance@floridapta.org.

These required items must be sent by the due date set out below via:

1. **Email:** See special email addresses to be used for each type of report in the chart below.
2. **FAX:** 407-240-9577
3. **Mail:** Florida PTA, 1747 Orlando Central Parkway, Orlando, FL 32809

Item	Due to Florida PTA Office	Format Sent	Date Sent To Florida PTA	Notes
Local Unit New & Returning Officer Contact Information	July 1st (or as soon as elections are held)	Submit ONLINE Only: www.FloridaPTA.org President must maintain current email addresses for the board		Must have new registration every year even if there are no changes in officer's information.
Membership Dues For all PTA/PTSA local units.	Monthly as dues are collected	Mail Only: Send with State & National Dues Payment Form from the website www.FloridaPTA.org		Send \$3.50 per membership sold - The State & National portion of membership dues.
Audit / Financial Review as of June 30 each year.	September 30th	Fax, mail or email to: 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 30th	Fax, mail or email to: 990@floridapta.org		All PTAs/PTSAs are required to file an IRS 990 each year. File either 990N (e-Postcard), 990EZ (short form) 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 the documents and information listed above for each of their subordinate local unit PTAs and county councils.

By meeting these requirements on the due dates specified, your local unit PTA will not only remain in good standing, but 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 or not they have a parent organization.

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 regarding compliance, please contact Florida PTA by email compliance@floridapta.org or call 407-855-7604 or 1-800-373-5782.