

New and returning officer training

2023-2024

PTA Mission

- ▶ PTA'S mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.



Compliance Checklist

All local PTA or PTSA units must complete this checklist every year.

 Update new and returning officers Due: July 1	 Annual Audit Due: August 31	 IRS Form 990 Due: November 15 <small>(or as soon as you finish the audit)</small>
 Membership Dues FLPTA: Monthly HCCPTA: October 1	 Bylaws Due: Every 3 years	 Insurance Due: Check your policy

Website: hccptapta.org

Compliance Requirements

MemberHub
libertytampa.memberhub.com/compliance?section=reports

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LIBERTY MIDDLE SCHOOL PTSA (Hillsborough)

Current Organization LIBERTY MIDDLE SCHOO...

Compliance

Compliance Submissions [View](#)

Enter your compliance submissions like Form 990s and Financial reviews.

School Year 2022 - 2023

Insurance Confirmations Submitted: 09/14/2022 at 1:11 pm	Approved: 09/21/2022
Form 990 Confirmations Submitted: 11/14/2022 at 11:06 pm	Approved: 11/17/2022
Unit ByLaws / Amendments	<input type="button" value="Submit"/> Due: 11/19/2022
Audit / Financial Reviews Submitted: 08/31/2022 at 11:14 am	Approved: 09/11/2022

4 ?

Dashboard
Directory
Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraising
- Store Management
- Website Builder
- Memberships
- Compliance
 - Update Officers
 - View Unit Data
 - Enter Submissions (Form 990s, Financials)
 - View Documents
- Givebacks New!
- Settings

QUICK LINKS

0 B/s 650 KB/s 1 KB/s 3 KB/s 8:41 PM 6/4/2023



Hillsborough County Council PTA/PTSA Dues 2023/2024

County Council dues are moving to a tiered flat fee structure starting 2023/2024 school year

Your unit's dues are calculated based on the last year's total membership as reported to Florida PTA and are due no later than 1 October

10-49 members - \$10	200-299 members - \$75
50-99 members - \$25	300-399 members - \$100
100-199 members - \$50	400-499 members - \$125
500 or more members - \$150	

Dues enable us to provide programs such as: advocacy expenses in advancing public policy, training to local units, HCCPTA Senior Scholarship program, Title 1 School Scholarships/Grant and so much more

Invoices include a request for a Title 1 Sponsorship donation of \$50 and a \$25 donation for Senior Scholarships

NEW!

- ▶ Free to all local units!
- ▶ Manage members
- ▶ Pay dues
- ▶ Store compliance documents ***HCCPTA Requirement as of 23-24***
- ▶ Merchandise Store
- ▶ Website
- ▶ Fundraisers
- ▶ Workshops: <https://info.memberhub.com/workshops>
- ▶ Direct Support: <https://app.hubspot.com/meetings/valerie-licata>

The logo for 'givebacks' features the word 'givebacks' in a bold, blue, lowercase sans-serif font. A small orange asterisk is positioned above the letter 'i'.

President

Focus: Prepare your team for a new year

- ▶ Be ready to conduct business:
 - ▶ Check your bylaws, insurance policy, dues are current, audits is done (or scheduled) and that plans are in place to complete your IRS 990 filing.
 - ▶ Update emails, log ins, passwords, get your binders from your predecessor.
 - ▶ Reach out to your team and set your first board meeting.
 - ▶ Work with your treasurer to ensure bank signers are updated and your secretary has all the records.
- ▶ A successful unit is one that plans ahead:
 - ▶ Set your calendar of events and programs.
 - ▶ Create your budget.
 - ▶ Update your Standing Rules (a.k.a. Policies & Procedures).
 - ▶ Summer planning meeting.
- ▶ Read your Florida PTA Kit of Materials:
 - ▶ Section 2 Officers ******timeline is included******
 - ▶ Section 3 Dollar\$ and \$en\$e
 - ▶ Section 4 Bylaws

How do I run a meeting?

- ▶ Quorum
 - ▶ It is one half of your board plus one.
 - ▶ If you do not have quorum, you cannot vote on items.
- ▶ Robert's Rules of Order
 - ▶ Answer: At every meeting.
- ▶ Board Meetings
- ▶ General Meetings
- ▶ What do I do if I do if my secretary is absent?
 - ▶ Answer: You appoint someone to take minutes and record that in the meeting minutes.

Secretary

Focus: Maintains all records & documents

- ▶ Maintains all permanent records - whether physical or digital.
- ▶ Work with the president to prepare an agenda and have minutes and all supporting documents ready for the summer meeting.
- ▶ Assist the president in making sure that all compliance items are completed and on file with you. These records are permanent and you should have them with the minutes.
 - ▶ IRS 990
 - ▶ Audit
 - ▶ Bylaws
 - ▶ Insurance
- ▶ Read your Florida PTA Kit of Materials:
 - ▶ Section 2 Officers ****timeline is included****
 - ▶ Section 3 Dollar\$ and \$en\$e
 - ▶ Section 4 Bylaws

Treasurer

Focus: Responsible for all monies and equipment

- ▶ Incoming (or returning):
 - ▶ Set the date of your audit.
 - ▶ Organize your records and conduct an audit on yourself to see if anything is missing.
 - ▶ Incoming Treasurers - do not accept the books until the audit is complete.
 - ▶ Do not forget to ask for a supply list of all property owned by the PTA.
- ▶ Prepare a preliminary budget and set a date for your first budget meeting.
 - ▶ 3:1 Rule
 - ▶ You must fundraise for your PTA as a whole, not for specific groups of individuals.
- ▶ Assist the President & Secretary with Compliance - dues are current, copies of audits and IRS filings have been provided.
 - ▶ Do not forget to report to your board AND your membership when you complete a compliance item.
- ▶ Read your Florida PTA Kit of Materials:
 - ▶ Section 2 Officers
 - ▶ Section 3 Dollar\$ and \$en\$e
 - ▶ Section 4 Bylaws

Meetings - what do you need to know?

▶ Quorum

- ▶ Board Meetings you must have one half plus one of your officers.
- ▶ General Meetings is a minimum of 10 members for quorum.
- ▶ Committee Meetings do not have a minimum and do not require minutes. Committees will provide a Plan of Work to the BOD for approval before any work begins.

▶ Minutes

- ▶ Purpose - record of the business you conducted.
- ▶ If your secretary cannot attend a meeting you must appoint an acting secretary and record that in the minutes. It does not require a vote, simply state who is being appointed and why.

▶ Notice

- ▶ General meeting require a minimum of a 10 days notice to your membership.
- ▶ Posting on Facebook is NOT enough.
- ▶ It is strongly recommended you send an email via Givebacks as this will provide a record of when you sent the notice.

▶ Tips for success

- ▶ Board meetings are to make decisions not for discussion. All discussion should take place in committee work.
- ▶ Provide an agenda and supporting documents with enough time so your board (or membership) has time to look them over.

Resources

- ▶ Florida PTA Kit of Materials
- ▶ www.hccptatpsa.org
- ▶ www.floridapta.org
- ▶ www.nationalpta.org

Contact us!

- ▶ President - Ami Marie Granger Welch
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