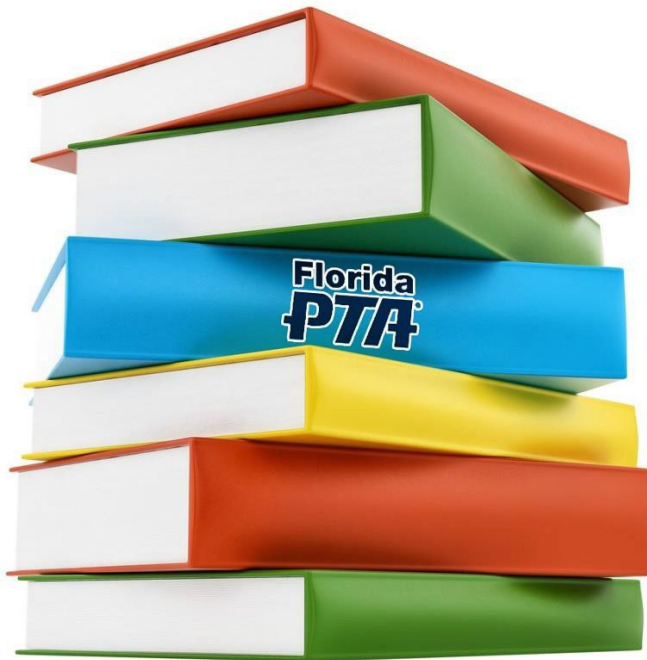


PTA General Information

2024-2025



Purposes of PTA

Local, State, and National

PTA Values

- **Collaboration:** We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

The Florida Congress of Parents and Teachers, Inc. (Florida PTA), a branch of the National Congress of Parents and Teachers (National PTA), is a nonprofit educational association which seeks to unite the forces of home, school and community on behalf of children and youth. It is a democratic association and believes in democratic processes and principles.

Purpose/Mission

The overall purpose of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Policies

The association is noncommercial, nonsectarian and nonpartisan. No commercial enterprise and no candidate may be endorsed by it. The name of the Florida PTA, its regions, councils and local units or their officers in their official capacities may not be used in any connection with a commercial concern, or with any partisan interest, or for any other purpose than the regular work of the association. These policies should not be confused with authorized parent teacher activities in the field of legislation.

Structure

The work of the Florida PTA (incorporated under the laws of the State of Florida) is carried on through its local PTAs. Each local PTA unit is a self-governing group, planning its programs and activities to meet the needs of children and youth in the communities in which they serve. However, the bylaws of each local association must be approved by the state, as they must conform to the policies of Florida PTA and National PTA.

Correct Usage of PTA

PTA and PTSA are registered service marks of the National PTA and may be used only by those in membership with the National PTA. Do not use hyphens, periods or small letters. When used as a plural noun, it should be PTAs or PTSAs.

Charters

Local PTAs may be organized and chartered in any school, workplace or community in the state. A charter is issued by the Florida PTA, upon receipt of and approval of the local association's bylaws, officers, payment of dues and a Federal EIN.

If a charter has been lost or destroyed, a duplicate charter will be issued upon written request.

Should any chartered association change its name, the original Bylaws, *Article I - Name* (with the change indicated) must be sent to the state office immediately. A charter with the new name will be issued by the state office.

Procedures for the proper organization or dissolution of a PTA are in the *Florida PTA bylaws, Article VI*. For detailed information, please contact the state office, county council president or region representative.

Regions

Florida is divided into seven (7) regions so that a closer working relationship with local PTAs may be achieved. Region representatives are elected by the Florida PTA executive committee every two years. The region representative has the responsibility for guidance to local PTAs, interpreting and extending the PTA programs, organizing new PTAs and developing PTA leadership in non-County Council organized areas in the region.

Each region holds a meeting at Leadership Convention. Additional region meetings can be scheduled as needed. Region meetings are held to build leadership, to strengthen PTA programs and to stimulate growth in membership enrollment and participation.

County Councils

A council is a group of local PTAs organized under the authority of Florida PTA for the purpose of conference, leadership training and coordination of the efforts of the member PTAs.

A council is governed by approved bylaws designed to meet its specific needs. Local PTAs join the council as a unit, not as individual members and pay dues according to the council bylaws. Councils are responsible for organizing new local PTAs within the county. Councils are guided by the same purposes and basic policies as the national, state and local units.

Strengthens Local Units

A council serves as a medium through which PTAs of an area can work together on issues beyond the scope of a single PTA working alone. Organized into a council, a group of PTAs can bring the power of united planning and effort to bear on solutions of community-wide problems affecting children and youth. A council strengthens each local unit enabling it to work more effectively in its own school and neighborhood.

Serves the Community

The council acts as a channel of communication by relating valuable information, instruction and news from the State and National PTAs. It alerts the PTAs to state and national plans and helps them to translate these plans into programs and projects that serve the community.

Council meetings are used to increase the effectiveness of PTA; to provide procedures and techniques; to stimulate PTA, council or public action; to accomplish specific purposes; and to interpret and participate in state and national programs.

Sets Good Example

In financial as in all other affairs, a council has a dual responsibility to work efficiently toward achieving its purpose and to set a good example for its member PTAs. No PTA may be compelled to contribute to special projects or to participate in a money-raising event against its wishes. A council may not legislate for the local unit.

Develops Leadership

Through conferences and instructional meetings, the council enables PTA officers and chairs to exchange ideas and plans, to benefit from each other's experiences in PTA work, to learn new techniques of leadership and to receive training for their specific responsibilities. A part of every council's year-round training program (schools of information, workshops, study groups, etc.) should be conferences that council officers and committee chairs hold with their local counterparts.

For PTA members it provides opportunities to gain broader experiences in leadership through service as tasks of greater responsibility.

Student Engagement

Bridge the Gap through Student Engagement. Much like a bridge makes connections, student engagement will connect every component of PTSA - parents, teachers and students. Fostering the relationship and understanding the importance of students in the organization will strengthen your PTSA; and everyone benefits - the community, the schools, the PTSA and the students themselves.

Cooperative Relationships

While maintaining its independence as an association, the Florida PTA recognizes the value of cooperation with governmental and other agencies whose programs are based on a common interest in child welfare. The Florida PTA often shares in the combined knowledge of many organizations and contributes its experience and leadership to joint projects.

Records Retention

It is suggested that a copy of the following information be attached to the records of the secretary and treasurer so that essential materials are retained notwithstanding change-over in officers.

Permanent:

Annual Audit/Financial Review Reports, IRS 990s, Charter, Bylaws, Standing Rules, Legal Correspondence, Reports made to Federal/State agencies, Insurance Records, Minutes and Agendas.

Seven Years:

Accounts Payable records, Cash Receipt records, Cancelled Checks, Invoices, Sales records, Bank Reconciliations, and Budgets.

Three Years:

General Correspondence.

Services

The Florida PTA serves its membership through the following methods: state office in Orlando, annual state leadership convention, region meetings, group or individual help by the leadership teams, workshops, legislative dispatches, state legislative activities, state and national representatives as speakers and conference leaders, and state releases to newspapers.

Programs, publications and other materials are sent to the local associations and county councils and each local unit officer will be added to a distribution list to receive the *Florida PTA eNewsletter(s)*. A website (www.floridapta.org) is available with current information. These and many other services are available from the state PTA office. The State Office also has historical records for each local unit and county council PTA.

Each year, a Kit of Materials is provided by the state office to local unit officers, president, secretary and treasurer whose name, home mailing address, phone number and a valid email address have been registered through its website, using the online submission form, New & Returning Officers form. **Each enclosure is an important “tool” for local leaders and should be shared with other PTA board members.**

These services are made possible with money received from membership dues.

Membership and Dues

Any person interested in the Purposes of PTA, willing to uphold its basic policies and subscribe to its bylaws may become a member. Membership is all-inclusive. When dues are paid to the local PTA, an individual becomes a member of both the Florida PTA and National PTA. **Any person, whether they have a child at the school or not,** can join a local unit PTA.

Local units set their own dues, from which \$3.50 per member must be sent to the state office for state (\$1.25) and national (\$2.25) dues. Services from state and national are provided through payments of membership dues. Dues **must** be paid monthly, as collected.

It is the responsibility of the president/treasurer to forward the state and national portion of dues to the state office, monthly as collected. A local group *failing* to submit these dues is not authorized to use the registered service mark, PTA or PTSA, or its IRS 501(c)(3) tax exempt status.

Please refer to the Membership Section in Section 5 – Committees.



Thank You for being a PTA Member!!!

Honorary State Life Membership

An honorary state life membership, a living memorial to the recipient, is given for meritorious and outstanding service on behalf of children and youth. There is no better way in which to honor members or friends in the community who are worthy of recognition. Local associations, councils, groups within any of these divisions, by individuals or group of individuals may give life memberships.

These honorary state life memberships do not carry a special privilege to vote and/or hold office and provide only guest privileges upon payment of the registration fee at Leadership Convention. However, the person honored may be an active member of a local unit by paying dues to that association.

These memberships may be presented at local or council meetings and at Leadership Convention. The fee is \$75, which includes a certificate suitable for framing, a pin and a wallet size identification card. A request for an honorary state life membership can be done through the website, under the "PTA Leaders" tab. You will need the complete name and address of the recipient, along with the date the presentation is to be made, and indicate to whom the materials are to be sent.

History Walk of Fame

Is there someone you want to honor who already has an Honorary State Life Membership?

You may purchase a brick inscribed with the name of someone special (for a local unit president, principal, past state president from your county, county council president, etc.) for \$100 - they will receive a certificate and a pin. The brick will be added to the Walk of Fame at the state office to honor and remember people who have done so much for children.

A request for an History Walk of Fame brick can be done through the website, under the "PTA Leaders" tab. You will need the complete name and address of the recipient, along with the date the presentation is to be made and indicate to whom the materials are to be sent.

Florida PTA President's Award of Honor

Florida PTA has established an award for presentation to individuals for outstanding service to children and youth. This award was created as a means to honor the special people that have made PTA what it is today. Our President's Award of Honor is for recognition of educators, volunteers, students, individuals and/or businesses who make a difference for children. Each special person honored will receive a certificate from Florida PTA and their names will be on display at the Florida PTA State Office in Orlando. The net proceeds raised will be divided between the Florida PTA Scholarship Fund and the Florida PTA Building Fund. **(The recipient must already have a Florida PTA Honorary Life Membership to be eligible for this award.)**

These special recognition Awards can be made ALL year. These awards are a great gift for that special person! The application is on the Florida PTA's website www.floridapta.org.

Special Recognition

In Memory of.... Expressions of sympathy may be sent to the state office in the form of a memorial gift. An "In Memory Of" acknowledgment will be mailed to the family informing them of your contribution.

In Honor of... This is a unique way to honor a special someone who has given or is still giving outstanding service to children and young people. An appropriate "In Honor Of" announcement will notify the honoree of your gift to the Florida PTA.

The money for these recognitions will go to the PTA Restricted Fund, unless otherwise specified by the donor.

Channels of Communication

The Florida Congress of Parents and Teachers

A Branch of

The National Congress of Parents and Teachers

Governing Body
Annual State Convention

Voting Delegates - State Board of Directors - accredited council representatives and accredited representatives of each local association.

State Board of Directors Working Through State Executive Committee

8 State Officers - elected from state at large by delegates to convention
President, President Elect
Treasurer, Secretary
Vice Presidents:
Leadership Development, Regions & Councils,
Membership Development, Educational Development

(Region) Representatives elected by Executive Committee

County Council Presidents

Chairs of Standing Committees - elected by Executive Committee

Immediate Past President Parliamentarian

National PTA Board Members residing in Florida

Consultants appointed by the President

1747 Orlando Central Parkway
Orlando, FL 32809

407-855-7604
407-240-9577 - Fax

www.floridapta.org
info@floridapta.org

Keys to a Successful PTA Year

Proper planning and organization are the keys

At the beginning of the school year:

- Attend Florida PTA Leadership Convention and your County Council PTA Workshops/Trainings.
- Review your Florida PTA Kit of Materials and the National PTA Local Leader Kit (www.pta.org).
- **Keep your NPTA ID number (local unit number) & Federal EIN available.**
- Create a “Plan of Work” and a Procedure Book. Update throughout the year. (See next page for info.)
- Provide committee chairs with copies of materials that are pertinent to their position.
- **Make sure the PTA treasurer’s books for the previous year have been audited and the Florida PTA Audit Form (6/2024 version) is completed.**
- Prepare your annual budget. It should be adopted at the first PTA general membership meeting of the new school year. (No monies should be spent until budget is approved.)
- Have board members subscribe to e-newsletters from Florida PTA and National PTA. These e-mail newsletters keep you informed on important issues and activities throughout the year.

During the school year:

- Submit Audit by August 31, Federal IRS 990 by November 15, submit a copy, after filing to the state office. Information for filing requirements are located on the Florida PTA website.
- Attend county council meetings and Florida PTA meetings during the year.
- Read your County Council/Region Newsletter and the Florida PTA eNewsletter. (If not receiving the Florida PTA eNewsletter, email: communication@floridapta.org).
- Plan a Reflections program. (Send in officers, annual audit and 990, membership dues to FPTA to be eligible. Bylaws must have an approval date through the end of the current year to be eligible.)
- Contact your County Council or Region Representative if you need assistance or have questions.
- Support at least three (3) programs/projects for each fundraiser (3 to 1 rule).
- Conduct officer elections before the end of the year and submit new officers’ information to Florida PTA, through the online registration form. (Register New & Returning Officers using online submission form.) Required information for President, Treasurer and Secretary: mailing address, valid email and telephone number.
- Attend Legislative meetings with your local legislators at home, where your participation is most effective.
- Contact your County Council president or Region Representative if you are interested in serving on the County/State level.
- Remember we are working together for *everychild.onevoice*.

Every PTA can be Successful! - Start a Procedure Book

A Tool Kit for Continuity in your PTA A Necessity for your Successor

If each council, local officer and committee chair would compile a procedure book, the work of our associations would continue in a more efficient manner than ever before. One valid criticism that has been made of PTA is that it closes up shop every spring and the new owners come in the fall to open shop and know nothing of the stock on the shelves and very little about how to manage the store. Procedure books keep the store open from year to year.

What is a Procedure Book?

A loose-leaf binder makes a serviceable and convenient cover to which pages can be easily added. Or you can use a USB. Since some of your most valuable materials don't fit in a notebook, an expandable file may be useful. It is suggested that each book be used for a three-year period. Remember that a procedure book is the property of the PTA and not the person who is using it this year.

What Do You Put in it?

1. Name, address, telephone number and period served.
2. Your plan of work and calendar.
3. All information from County/State/National PTA.
4. Directory of board members, faculty, your committee, council and state counterparts and other contacts.
5. Association bylaws, current budget and newsletters.
6. All correspondence pertaining to your office or chair; copy of any reports sent to council, state or national.
7. Notes from workshops, conferences and conventions attended.
8. Any other resource material you have found to be helpful.
9. Evaluation of the year's work with specific suggestions for improvements.

In that expandable file, there should be a copy of the *National PTA Local Leader Kit* (a digital copy is available at www.pta.org), publications pertaining to your job and other valuable documents you've acquired.

REMEMBER the procedure book belongs to the PTA, not the individual.

A Most Important Tool!

A procedure book, one of the most important basic tools in PTA work, is often the least used! Since the majority of the new recruits have little or no experience in the job, they need a procedure book in identifying the work and continuity of an officer or committee chair and to chart a course of action to be followed. Association background, contributions from others, successes and failures - an up-to-date record gives a foundation on which to build.

If you didn't receive one, now is the time to start one!

Frequently Asked Questions

1. Who determines when and how to spend the money?

A budget must be presented to the general membership at the beginning of *each* school year. Once the budget is approved by the membership, the board has the authority to spend the specified amount of money in each line item. Anything not in the budget, or over the amount previously voted on, must be presented to the membership to be approved at a general meeting. Money cannot be transferred from one line item to another without approval by the membership. The money belongs to the membership, not the board and must always have membership approval to be spent. For further information review the Kit of Materials, Dollar\$ and \$en\$, Financial Guide for PTA units.

2. How do we get an audit committee and who serves on it? How do we report the findings?

Check your bylaws, Article VII, Section 5 to see if it is appointed or elected by the board. The committee should not include the president or the treasurer (or other authorized signer on the PTA accounts), you cannot check your own work. You can also retain a CPA.

The committee can be board members or members of your PTA community. The books must be closed by June 30 and turned over as soon as possible by the treasurer to the committee. The books are then returned to the new treasurer within a week. An audit report is read at the first general meeting of the new fiscal year. After the audit is completed, a copy must be sent to Florida PTA. Send a copy to: audit@floridapta.org.
Deadline: August 31st.

3. Do we have family memberships and business memberships?

No, family memberships are not recommended. A membership card can only be issued to one person. Being a PTA member brings voting privileges. Remember - one member equals one card; two members equals two cards.

PTAs may have business memberships. Businesses would support the work of the local unit, but not be a voting member of your PTA. Your PTA would determine the amount of this membership and what would be offered to the business for their support.

4. How are elected officers and board members replaced?

After being elected, if an officer resigns, then the executive board has the authority to replace the officer at a board meeting, notice having been given to the board members of the upcoming election (see local unit bylaws, Article VI, Section 4). If committee chairs are elected by the executive committee, then the committee would also replace them if a resignation occurs. If the president appoints positions, then the president would replace a vacancy. Check your bylaws to determine how to proceed in your PTA.

5. Whose money can be deposited in the PTA account?

Never deposit any school club or other school organization's money into the PTA account. Only deposit PTA generated funds. If you are co-sponsoring an event such as a 9th grade/PTA dance then the money can be deposited in the PTA account sharing expenses and profit. Review Financial Guide and Best Practices in the Kit of Materials, Dollar\$ and \$en\$. Any agreements between the parties should be recorded in the board meeting minutes before the event.

Frequently Asked Questions (continued)

6. Are PTAs required to have insurance?

Most school districts require and Florida PTA strongly recommends that all PTAs purchase Liability Insurance. Check with your school board/county council to see what types of insurance and amounts of coverage are required for PTA events. Sometimes it is necessary to purchase a rider to the insurance policy on a one-time basis for special events. Check with your County Council or school district.

7. How does a PTA remain in good standing?

(1) Current officers. A PTA is required to have three officers: a President, Secretary, Treasurer with a valid email address and contact information for each officer, including home mailing address and phone number. Florida PTA does not share your information with non-PTA entities; and

(2) Dues must be paid each year, **monthly as collected**, through Givebacks, with the final payment and accounting by **MAY 1st, each year, for award purposes only, memberships may be sold year-round**; and

(3) Bylaws must be updated, **at a minimum**, every three (3) years and sent to the State Office for approval, (bylaws@floridapta.org); and

(4) Have an EIN# from the IRS and file an IRS 990 each year (due on or before November 15 each year), forwarding a copy to 990@floridapta.org by November 30th.

(5) Annual audit after the close of each Fiscal Year, sent to audit@floridapta.org **by August 31st**.

(6) Comply with County Council requirements.

8. Are PTAs allowed to vote electronically or have electronic meetings?

Please refer to your local unit bylaws regarding electronic voting and meetings.

9. Are PTAs allowed to videoconference or teleconference meetings?

Videoconferences or teleconferences are authorized by your bylaws. Such a meeting must be conducted by a technology that allows all persons participating to hear each other at the same time (and, if a videoconference, to see each other as well). All updated current bylaws, have the electronic meeting language in them. The opportunity for simultaneous communication is central to the deliberative character of the meeting, and is what distinguishes it from attempts to do business by postal or electronic mail or by fax. For these types of meetings, you will also need special rules of order and standing rules, as appropriate, to specify how the meeting is to be conducted and the circumstances that allow for an alternative to a regular meeting.

When treading new ground, we take on the responsibility of making sure that the plan is well thought through and take the time to ensure that all members' rights are protected.

10. Do we need to have a nominating committee and if we do how do we select one?

PTAs are required to **elect** a nominating committee at least 30 days before the election meeting. Check your bylaws, Article VI, Section 3 on how to elect the committee and who serves on this committee.

Frequently Asked Questions (continued)

11. Can we elect co-presidents or treasurers?

Florida PTA and Robert's Rules of Order **does not recognize co-officers**. Someone must be in charge and responsible for the position. The first vice-president can assist the president and a treasurer is always responsible for the money (checks, bookkeeping, deposits, etc.) even if someone assists in the duties.

12. How many days' notice is required to be given to the General Membership for a Bylaw's amendment?

#Article XVI: Amendments

The Florida PTA required that bylaws be reviewed every year, at a minimum, submitted to Florida PTA State Office every three years, for approval. Procedure requires that at least thirty (30) days' notice be given to the members of the association when amendments are needed and that the members adopt the change(s) by a 2/3 vote. Send the original bylaws on the required form to the state office for approval.

13. Who can vote at an election meeting? Who can be nominated?

Only members who have joined your PTA at least 30 days prior to the annual election meeting are eligible to vote. However, a member can join at the time of the election meeting and run for office even though they cannot vote. Anyone nominated for any office at any time must be a member of that local unit PTA.

A person must be a PTA member of the local unit PTA before running for office.

14. At the end of the school year, can the board determine what to do with money left in the budget?

No. The PTA board cannot write checks to the school/principal for unbudgeted items to "cleanout" the accounts. Expenditures must be approved by the general membership at a meeting

15. How do we determine how much money can be spent on board members to attend conferences county workshops, etc.?

This is determined by the amount of income your PTA has. Standing rules should be set up to govern your board activities and these rules should include the amount of money that can be spent for meals, registration, mileage, hotels, etc. When rules are adopted then there can be no misunderstanding of the amount of money a PTA will reimburse a board member who attended a conference. This is a legitimate PTA expense for board members to attend trainings.

16. How do you qualify for 100% Membership Award (Celebrate Membership)?

100% is reached when PTA membership is equal to the number of families represented in the school on day five of the school year. If the school is unable to determine the number of families, the following percentages may be used to calculate 100% membership:

- 75% of students for K-5 (6 year schools)*
- 75% of students for K-8 (7-9 year schools)*
- 80% of students for (3-4 year schools)*
- 85% of students for (2 year schools)*
- 95% of students for single grade centers*

FLORIDA PTA - 2024-2026 Board of Directors

Officers

President

Maxine Ann-Marie Lewers (Broward)

President@floridapta.org

President Elect

Jude Bruno (Miami-Dade)

President.elect@floridapta.org

Vice President for Leadership Development

Karen Mazzola (Seminole)

Vp.leadership@floridapta.org

Vice President for Regions and Councils

Shelly Pedraza (Seminole)

Vp.Regionscouncils@floridapta.org

Vice President for Membership Development

Denise Nicholas (Pasco)

Vp.membership@floridapta.org

Vice President for Educational Development

Lawrence Clermont (Pinellas)

Vp.education@floridapta.org

Secretary

Toni Nielson (Polk)

Secretary@floridapta.org

Treasurer

Erica Hamblen (Hillsborough)

Treasurer@floridapta.org

Florida PTA

1747 Orlando Central

Parkway Orlando 32809

TELEPHONE: (407) 855-7604 | FAX: (407) 240-9577

Jean Hovey, Office Manager | Office.Manager@floridapta.org

National PTA

President: Yvonne Johnson

Phone: (800) 307- 4782 - Info@pta.org

**PTA BOARD MEMBERS AND CONTACT INFORMATION IS LISTED
ON THE FLORIDA PTA WEBSITE UNDER THE ABOUT US TAB**

Founder's Day – 125+ Years of Advocacy

In 1870, the census reported that 750,000 children between the ages of 10 and 15 were working throughout the country. This number increased over the next few years. In the 1890s someone started asking questions. Why should countless children be working in dark, damp factories? Why should they be denied the benefits of good food, adequate shelter, wholesome fresh air and education?

This someone was **Alice McClellan Birney** of Washington D.C., who didn't stop with just asking questions and worrying about our children. She went to work to change things. She realized that the mothers of these children had to be educated and the nation made to recognize the importance of the child. Why not have a National Congress of Mothers?

By joining forces with **Phoebe Apperson Hearst**, the first Congress meeting was held at the White House in February, 1897. Our founders hoped for two hundred to attend. Two thousand came, and PTA was on the way.

In 1924, the name was changed from National Congress of Mothers to National Congress of Parents and Teachers, as more and more teachers and fathers joined.

Because of the dual system of schools throughout the country, Black parents organized the National Congress of Colored Parents and Teachers in 1926 and **Selena Sloan Butler** was founder and the first president. The two separate groups became one nationally in 1970, but had merged in Florida in 1968.

Florida became the 38th state to organize a "branch" when the Duval County Federation of Mothers Clubs and West Riverside PTA of Jacksonville invited groups from all over the state to meet together in 1921. A charter was granted on April 14, 1923, when the Florida Congress satisfied the requirements for 20 associations with a total membership of 500.

Looking back to that first meeting in Washington, we discover that we still have many of the same concerns for children. Advocates for children are needed more today than they were in 1897 and our role continues to grow.

It is important to remember the work of our first leaders. We should pause each year and pay tribute to them through our observance of Founder's Day each February 17th. We can do this by:

- Resolving to work harder for PTA concerns.
- Making the community aware of what the PTA (National, State, Local) has done and is doing.
- Having a PTA display on what has been done.
- Inviting community leaders (mayor, commissioners, etc.) to attend a special Founder's Day program.
- Highlighting the work of local volunteers. If you start gathering information on the number of hours PTA volunteers put in, you'll be pleasantly surprised. Recognize all PTA volunteers on Founder's Day.
- Providing an opportunity for a special Founder's Day gift. Monies collected at an observance for Founder's Day or designated in the budget, should be forwarded to the state PTA office. Half of the donation remains in the state and half is sent to National, but it all comes back to the local unit in services such as leadership training and organizing new PTAs.

BOARD AND UNIT RESPONSIBILITIES

Even though the Treasurer and President have a major role in the financial and accounting operations of the unit, all board members are responsible for the general oversight of the financial operations of the unit. These same leaders also have an obligation to their members to be responsible and accountable in how they spend PTA money. This typically would include but not be limited to either confirming or reiterating that the following activities be performed. (Note: Most of these items are specifically listed in all PTA unit bylaws.)

- A formal audit or financial review occurs at least annually. See *Annual Financial Review (PTA Audit)* for more information.
- A budget is adopted by general membership before funds are disbursed. See *Budgets* for more information.
- Anticipating and requesting, if necessary, that the treasurer share informative financial reports at all General Membership and during monthly Board meetings. See *Treasurers Books, Files and Records: Treasurers Monthly and Annual Reports* for more information.
- Monitoring of the budget between general membership meetings.
- Original financial bank statements are examined by a member (in addition to the Treasurer) who is not an authorized person on the account. See *Banks: Bank Statements* for more information.
- The unit has appropriate and up-to-date insurance coverage (liability and either bond or officer's coverage) and a rider policy as needed. See *Protecting PTA Funds: Insurance* and your unit's insurance policy for more information.
- The unit is reporting gross income (income or revenue be consistent) to the IRS (Internal Revenue Service) annually. See *PTAs and Federal Requirements* for more information.
- Basic Internal Controls are in place such as:
 - ◇ Authority and approval for disbursement of funds;
 - ◇ Proper documentation and accounting procedures;
 - ◇ Limiting Access (accounting records, merchandise, equipment sign-out sheets);
 - ◇ Dual accountability or verification of funds collected and funds disbursed;
 - ◇ Take **Immediate** action when "red flags" appear.

FLORIDA PTA 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 five items by the dates indicated on the compliance form.

Because the due dates vary, keep this list in your procedure book to use as a checklist to assist your unit in meeting these deadlines.



Membership Dues
Paid →

Audit Complete
& Submitted ↑

Officer Information
Submitted →

Copy of IRS Filing
Submitted ↑

Bylaws Updated
Every 3 Years ↗

All PTA forms are available online at floridapta.org under "Running Your PTA" - "Forms" tab.

If you have questions, please email compliance@floridapta.org

FLORIDA PTA **HIGH SCHOOL SCHOLARSHIPS**

Florida PTA is pleased to offer scholarship opportunities to student PTA/PTSA members graduating from Florida high schools in 2024-2025. Applicants must be members of a Florida PTSA. The PTA/PTSA must be in good standing by **December 15, 2024**.

All scholarships are a one-time (non-renewable) award and will be awarded to worthy students who are interested in getting a start in life through post-secondary education.

Interested Florida high school seniors are encouraged to visit the Florida PTA website for more information and to access the on-line application when it opens.

Florida PTA encourages all local units to participate in fundraising activities to build the Scholarship Fund to support Florida high school seniors.

The **minimum** eligibility requirements are as follows: Students must:

1. Be a member of their high school's PTA/PTSA or the Sunshine State PTSA (PTA/PTSA must be in good standing with Florida PTA)
2. Graduate from a Florida High School in the 2024-2025 school year.
3. Be a current resident of Florida.
4. Be planning to continue their education in the fall semester immediately following school graduation as a full-time undergraduate student in a Post-Secondary Institution, Vocational/Technical Institution, and/or Community/Junior College.
5. Complete the application (available online after September 1, 2024) submit letters of recommendation, proof of PTA/PTSA membership, essay, and copy of their high school transcript, ACT and/or SAT scores by the 2025 deadline. (Check the Florida PTA website.)

Additional factors will be taken into consideration selecting a winner (i.e., need, special circumstances, 504/IEP, extracurricular activities, leadership, and honors).

We invite and encourage interested students to apply. For further information and application forms, contact the Florida PTA State Office at 407-855-7604.

PTA/PTSA Units MUST be in good standing with Florida PTA.

Check Website for DEADLINE TO APPLY

FLORIDA PTA Leadership Convention

The Florida PTA Leadership Convention is our annual premiere event held each year, for all local leaders and members to learn more about PTA. It is a time for networking, collaboration and learning, and is an experience that everyone finds valuable, from the PTA leader just starting out to the most seasoned! Attending Leadership Convention is an opportunity for you to receive the most current training needed to be more effective in your leadership role(s) and sets you up for a successful and powerful school year.

It is in the best interest of PTA to ensure you have an expense line item in your unit's budget for the Leadership Convention, for training of your PTAs leaders, as it helps to invest in the future of your PTA.

Review your policies and procedures with your board and apply the process when deciding who will attend Leadership Convention. Though you will not know for certain the members of your new board until after your PTAs elections, go ahead and register those you anticipate returning next year (registration typically opens between January – early March). You can add registrations later however take note of the final registration date. If a registrant's plans change, Florida PTA can transfer the registration to another of your PTAs members. See the next page for information on budgeting and who to send to represent your local unit. The registration fee is not refundable.

Share the Leadership Convention dates with board members and your most active volunteers. Encourage them to keep the dates free at least until new officers are nominated and your new board starts to take shape.

Below is information on some of the key functions and activities held during the annual Florida PTA Leadership Convention.

Workshops: With many high-caliber workshops curated to enhance your personal and professional leadership development, there is something for everyone no matter where you are in your leadership journey. Key training workshops are held for presidents, secretaries, and treasurers by members of the Florida PTA Executive Committee. Other workshops offer support for PTA advocacy efforts, information on special programs, as well as those that help busy volunteers maintain a work-life balance. Florida PTA even offers workshops to help attendees make the most of their convention experience! Workshop attendance does not stop when attendees leave the training room. All presenters provide their contact information for follow-up questions and many make their presentations and handouts available digitally. PTA leaders can and should take important information back to their PTAs to share it with their board and volunteers or even with their general membership. Florida PTA wants to see great knowledge shared across the state.

General Meetings: Members usually sit together by county, as this opportunity allows attendees to meet and network with other PTA units in your area. General Meetings are held each day during Leadership Convention, and this is where the business of our association is conducted. These meetings include Keynote addresses, special recognitions, BOD reports, priority action items for the new school year, policy updates and most years, a resolution(s) is brought forward for debate and adoption.

Exhibitors: The Exhibit Hall usually offers companies highlighting new technologies, learning resources, school supplies, spirit wear, fundraisers, purpose-led nonprofits, consumer packaged goods, “edutainers,” authors and more! These entities are there to share their products and information for attendees to bring back to local units and members.

Resource Fair: The Resource Fair showcases and highlights **free** resources and value-added programs or events and information designed for you to bring back to your students, parents, school, and community.

Region and County Caucuses: These are exciting and fun gatherings of members from your area, to network and share ideas, recognitions and fellowship.

Awards and Recognition Ceremony and Diversity, Equity, Inclusion and Justice Event: The Awards and Recognition Ceremony and the Diversity, Equity, Inclusion and Justice event are separately ticketed events held each year at Leadership Convention. These highlight and recognize many of our Florida PTA unit award winners and individuals. Tickets are purchased in advance and are not available onsite.

County Councils: County Councils and Region Representatives will have tables set up near registration, for members to visit and learn about Council activities.

PTAs Scholarship Event: This is a very lively, interactive, and fun event where all proceeds benefit the many student scholarships Florida PTA provides each year. Purchase your tickets early with registration, as this is usually a sold-out event and tickets are not available onsite.

Reflections Gallery: Attendees can visit this amazing area to see the many displays of students in the National PTAs Reflections program. We are proud to share the works of these award-winning students who went on from local units to the Florida level and even on to the National PTA level.

Florida PTA Advocacy/History Wall: This display of pictures, memorabilia, and a video slideshow highlights PTA members advocating for the health, safety, education and general well-being of all children and many legislative items they helped to pass on the state level and others moved on to the National level.

Budgeting for Leadership Convention

How to budget? Budgeting for Leadership Convention is tricky. Some expenses will fall in this current year's budget, and others will come after July 1, which need to be in your "interim" budget. Encouraging car-pooling and room sharing for those that are able can keep costs down.

How much to estimate in your budget?

\$150 per PTA member for registration

\$1,200 for 3 nights (2 - 4 people) for lodging

How much to estimate in your interim budget? .445¢ per mile for travel to and from Convention and \$36 per day for food for each attendee

Who Attends Leadership Convention

ANYONE who is a PTA member is welcome to attend Leadership Convention. Most PTAs plan for 2-4 members to attend. Be sure to review your policies and procedures and/or standing rules and apply the process to decide who can attend Leadership Convention. Here is a suggestion of who to send Leadership Convention.



Your PTAs President



Your PTAs President and Treasurer



Your PTAs President, Treasurer, & Membership Chair



Your PTAs President, Treasurer, Membership Chair, & a Student Member



Your PTAs President, Treasurer, Membership Chair, a Student Member, & Another Board Member



Your PTAs President, Treasurer, Membership Chair, a Student Member, Another Board Member & a Member Who Wants to Learn