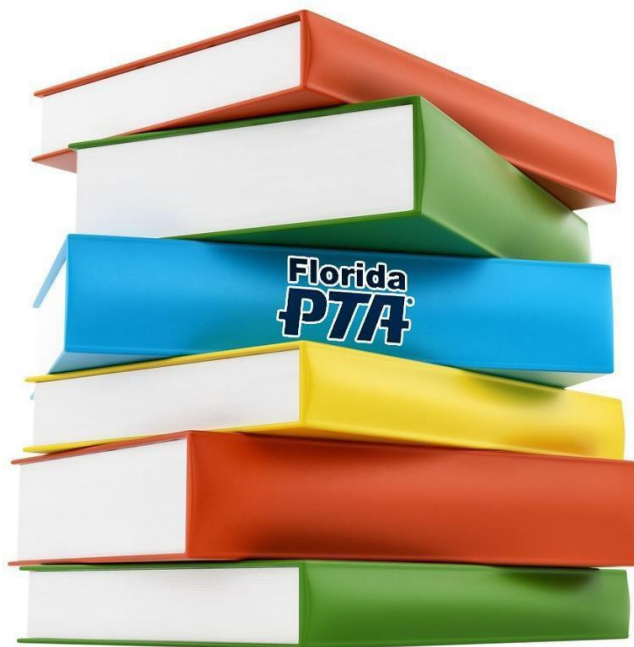


PTA General Information

2023-2024



Purposes of PTA

Local, State, and National

The purpose or purposes (Objects) which the Association will hereafter pursue are:

- a. To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- b. To raise the standards of home life;
- c. To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- d. To promote the collaboration and engagement of families and educators in the education of children and youth;
- e. To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- f. To advocate for fiscal responsibility regarding public tax dollars in public education funding.

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 each of the 67 counties of the state. The Florida PTA issues a charter, 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 the state 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 a 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, 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, 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 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.

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. As soon as the request is completed, you forward the fee 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 a 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. As soon as the request is completed, you will forward the fee 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. In either instance, the amount of the gift is not shown on the certificate; the amount may be deducted on your income tax return.



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 at large by delegates to Convention

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

Immediate Past President

Youth Member
Appointed by the President

Consultants
Appointed by the President

Parliamentarian

State Office Staff
1747 Orlando Central
Parkway
Orlando, FL 32809

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

www.floridapta.org
info@floridapta.org

President

President Elect

Vice President(s) for:
Leadership Development

Regions and Councils

Membership Development

Educational Development

Secretary

Treasurer

Commissions

**Leadership
Development
Commission
VP for Leadership
Development**

Leadership Convention
Leadership Development
Resource Development

**Advocacy Commission
President Elect**

Legislation
Resolutions

**Region & Councils Commission
VP for Regions & Councils**

All Council Presidents
Region Representatives

**Membership Development
Commission
VP for Membership
Development**

Awards & Recognition
Family & Community
Engagement
Membership
Media & Marketing

**Educational
Development
Commission
VP for Educational
Development**

Education
Educational Pathways
Mental Health,
Wellness & Safety
Social Responsibility

Proper Planning and Organization are the Keys to a Successful PTA Year

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.**
- 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 newsletters will 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 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.)
- 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 compiles 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.
8. Notes from workshops, conferences and conventions attended.
9. Any other resource material you have found to be helpful.
10. 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.

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, Treasurer Section (Dollar\$ and \$en\$e).

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 Treasurer section in the Kit of Materials, Dollar\$ and \$en\$e. 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, and 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;
- (2) Dues must be paid each year, **monthly as collected**, through Givebacks, with final payment and accounting **MAY 1, 2023, for award purposes only, memberships may be sold year-round**.
- (3) Bylaws must be updated, at a minimum, every three (3) years and sent to the State Office for approval;
- (4) Have an EIN# from the IRS and file a 990 each year (due on or before November 15 each year), forwarding a copy to 990@floridapta.org by November 30th.
- (5) Forward a copy of the local unit audit after the close of each Fiscal Year, by August 31st, to audit@floridapta.org.
- (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). Any bylaws updated after 2019-2020 have the 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 so, 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. 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.**

13. 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.

14. 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.

15. 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 to 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 - 2022-2024 Board of Directors

Officers

President

Carolyn Nelson-Goedert (Miami-Dade)

President@floridapta.org

President Elect

Maxine Lewers (Broward)

President.elect@floridapta.org

Vice President for Leadership Development

Lawrence Clermont (Pinellas)

Vp.leadership@floridapta.org

Vice President for Regions and Councils

Burt Miller (Broward)

Vp.Regionscouncils@floridapta.org

Vice President for Membership Development

Charman Postel (Palm Beach)

Vp.membership@floridapta.org

Vice President for Educational Development

Karen Mazzola (Seminole)

Vp.education@floridapta.org

Secretary

Melanie Williams (Orange)

Secretary@floridapta.org

Treasurer

Jude Bruno (Miami-Dade)

Treasurer@floridapta.org

Florida PTA

1747 Orlando Central

Parkway Orlando 32809

Phone: 407/855-7604

FAX: 407/240-9577

Robynn Demar, 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 healthy 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 Past Presidents

- 1921-22 * Mrs. James A. Craig, Jacksonville, Acting
1922-24 * Mrs. F. E. Godfrey, Orlando
1924-25 * Mrs. L. M. Anderson, Tampa
1925-26 * Mrs. Mary Leary, Deland
1926-30 * Mrs. A. F. Fanger, Jacksonville, Hialeah
1926-33 * Mrs. Mary W. Blocker, Jacksonville FSCPT
1930-32 * Mrs. H. B. Hutchinson, Tampa
1932-33 * Mrs. Howard Selby, West Palm Beach
1933-34 * Mrs. Malcolm McClellan, Jacksonville
1933-40 * Mrs. Bessie Baker, Jacksonville FSCPT
1934-35 * Mrs. Sumner W. Covey, Daytona Beach
1935-38 * Mrs. Clinton F. Parvin, Manatee
1938-40 * Mrs. Malcolm McClellan, Jacksonville
1940-43 * Mrs. L. H. Gibbs, Orlando
1940-46 * Mrs. Sadye E. Pryor, Pensacola FSCPT
1943-46 * Mrs. Walter H. Beckham, Miami
1946-49 * Mrs. Charles Pearson, Tampa
1946-50 * Mrs. Mayme Williams, Miami FSCPT
(NCCPT President 1953-57)
1949-52 * Mrs. Edith McBride Cameron, Gainesville
1950-54 * Mrs. Elizabeth Espy, Miami FSCPT
1952-55 * Mrs. Elizabeth Clyde Johnson, Pensacola
1954-58 * Mrs. Dorcas Sanders, St. Augustine FSCPT
1955-58 * Mrs. Myron R. Blee, Tallahassee
1958-60 * Mrs. W. L. Mussett, Miami
1958-62 * Mrs. C. W. Johnson, Tampa
1960-62 * Walter K. Harper, Jacksonville, FSCPT
1962-64 * Mrs. Howard M. Weenick, St. Petersburg
1962-66 * Arnett Osgood, Jr., Palatka FSCPT
1964-66 * Mrs. Nathan S. Rubin, Pensacola
1966-68 * Mrs. G. L. Barnard, Prescott, Arizona
1966-68 * Mrs. Willie Ziegler White, Tallahassee FSCPT
1968-70 * Mrs. Wayne Bevis, Tampa
1970-72 * Mrs. J. H. Johansen, Miami
1970-74 * Mrs. Robert Blackburn, Jacksonville
1974-76 * Mrs. Troy A. Chapin, Jr., Tampa
1976-78 * Mrs. E. Clayton Register, Jr., Clearwater
1978-80 * Mrs. Pete House, Jacksonville
1980-82 * Mrs. Perry O. Keene, Jr., Tampa
1982-84 Mrs. James E. Bounds, Orlando
1984-86 * Mrs. Edward Okasako, Hialeah
1986-88 * Mrs. Richard DiGiandomenico, Jacksonville
1988-90 * Mrs. Lawson E. Thomas, Miami
1990-92 * Mrs. Dan Laymon, Ft. Myers
1992-94 Mrs. Kay Luzier, Port Orange
1994-96 Mrs. Anne Thompson, Miami
1996-98 Mrs. Sandy Traeger, Winter Springs
1998-00 Mrs. Latha Krishnaiyer, Coral Springs
2000-02 Mrs. Patty Hightower, Pensacola
2002-04 Mrs. Pat Lancaster, Inverness
2004-06 Mrs. Nancy Cox, Longwood
2006-08 Mrs. Lenelle Cruse, Jacksonville
2008-10 Mrs. Karin Brown, Miami
2010-12 Mrs. Jean Hovey, Winter Springs
2012-12 Mr. Charles Derexson, Pinellas Park
2012-14 Mrs. Eileen Segal, N. Miami Beach
2014-16 Mrs. Mindy Haas, Boca Raton
2016-18 Mrs. Cindy Gerhardt, Pensacola
2018-20 Mrs. Linda Kearschner, Safety Harbor
2020-22 Mrs. Jennifer "Jen" Martinez, Lake Worth

* *Deceased*

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FLORIDA PTA

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



Robert's Rules of Order – The Basics

(This sheet should not be a substitute for *Robert's Rules of Order, Newly Revised*, 12th Edition, but is meant to supplement the full set of rules.)

Parliamentary procedure is a set of rules for conducting orderly meetings that accomplish goals fairly. Most PTAs use Roberts Rules of Order.

Benefits of parliamentary procedure include the following:

- Justice and courtesy for all
- Maintenance of order
- Consideration of one item at a time
- All sides get heard
- Ability for each member to provide input
- Majority rule
- Protection of the rights of all members including the minority

Basic Principles:

- All members have equal rights, privileges, and obligations
- No person can speak until recognized by the chair
- Personal remarks during debate are out of order
- Only one question at a time may be considered, and only one person may have the floor at any one time
- Members have a right to know what the immediately pending question is and to have it restated before a vote is taken
- Full and free discussion of every main motion is a basic right
- A quorum must be present for business to be conducted
- A majority decides a question except when basic rights of members are involved or a rule provides otherwise.
- A 2/3 vote is required for any motion that deprives a member of right in any way (e.g., cutting off debate)
- Silence gives consent. Those who do not vote allow the decision to be made by those who do vote.
- The Chair should always remain impartial

Basic Definitions:

Motion – A formal proposal made to bring a subject before an assembly for its consideration and action. Begins with **“I move that...”**

Second – A statement by a member who agrees that the motion made by another member be considered. Stated (without recognition) as **“Second,”** or “I second the motion.”

Amendment – Before the vote is taken on a motion, it may be amended by:

- Striking out words
- Inserting or adding words
- Striking out words and inserting others in their place
- Substituting one (1) paragraph or resolution for another

Quorum - the minimum number of members who must be present in order for a PTA to conduct business. The quorum can be found in the local unit’s bylaws. For boards and committees, unless stated in the bylaws, the quorum is a majority (*more than half*) of the members. PTAs cannot take votes on business matters unless a quorum is present.

Presiding officer – The individual who facilitates the meeting, usually the president. In the absence of the president, if none of the vice presidents are in attendance, the secretary calls the meeting to order and conducts an election for chair pro tem (a presiding officer for that meeting only).

Role of the Presiding Officer:

- To remain impartial during debate – the presiding officer must relinquish the chair in order to debate the merits of a motion and may not chair the meeting again until after a vote has been taken on the motion has been disposed of
- To vote only to create or break a tie (or 2/3 for matters requiring a 2/3 vote); exception: the presiding officer may vote on any vote by ballot
- To introduce business in proper order per the agenda
- To recognize speakers
- To determine if a motion is in order
- To keep discussion germane to the pending motion
- To maintain order
- To put motions to a vote and announce results

General procedure for Handling a Main Motion:

- A member must obtain the floor (*“Mr. President”*) by being recognized by the chair (*“The chair recognizes the member”*).
- Member makes a main motion (*“to move that...”*).
- A motion must be seconded by another member (*seated- no recognition necessary*) before it can be considered.
- If the motion is in order, the chair will restate the motion and open debate (*“It is moved and seconded that... are you ready for the question?”*).
- The maker of a motion has the right to speak first in debate (*obtain the floor and get recognition before speaking*).
- The main motion is debated along with any secondary motions that are debatable.
- Debate on subsidiary, privileged and incidental motions (if debatable or amendable) take precedence over debate on the main motion and must be decided before debate on the main motion can continue.
- Debate is closed when:
 - Discussion has ended, or
 - A 2/3 vote closes debate (*“call the previous question”* or *“call the question”*).
- The chair restates the motion and clarifies the consequences of affirmative and negative votes (*“The question is on the motion that...”*).
- The chair calls for a vote by asking “All in favor?” Those in favor say “**aye.**” Then asking, “All opposed?” Those opposed will say “**no.**”
- The chair announces the result (ex: *“The ayes have it the motion is adopted...the next item of business is”*).

General rules of Debate

- No member may speak until recognized by the chair.
- All discussion must be relevant to the immediately pending question.

- No member can speak more than twice to each debatable motion. The second time takes place after everyone wishing to debate the motion has had an opportunity to speak once.
- No member can speak more than ten minutes or as decided by members. Many PTAs limit debate to three (3) minutes per speaker by general consent (*if anyone objects to general consent it will take a 2/3 vote to limit debate*) at the beginning of the meeting.
- All remarks must be addressed to the chair – no cross debate is permitted.
- It is not permissible to speak against one's own motion (but one can vote against one's own motion).
- Debate must address issues not personalities – no one is permitted to make personal attacks or question the motives of other speakers.
- The presiding officer must relinquish the chair in order to participate in debate and cannot reassume the chair until the pending main question is disposed of.
- When possible, the chair should let the floor alternate between those speaking in support and those speaking in opposition to the motion.
- Members may not disrupt the assembly.
- Rules of debate can be changed by a 2/3 vote or general consent without objection.

Example of Handling a Main Motion:

Member rises and addresses the chair:
Chair recognizes member (by title or name).

*Madam (Mister) President.
The chair recognizes_____.*

Member makes the motion.
Another member seconds the motion (without recognition).

*I move that...
Second [or] I second the
motion.*

The chair states the motion and opens debate.

*It is moved and seconded
that...
Are you ready for the
Question? Or Is there any
debate?*

The chair recognizes members wishing to speak.
After debate concludes. Chair restates the motion and puts the question to a vote.

The question is on the motion to...

Those in favor of the motion say "aye." Those opposed say "no."

Chair announces the result of the vote and what action will be taken.

The "ayes" have it, and the motion is adopted. We will [stating action to be taken].

The chair continues with the next business in order.

Common methods of taking a vote:

General consent:

"If there is no objection, we will..." (Pause) "Since there is no objection, we will..."

Voice vote: *"All those who are in favor, say "aye." All opposed, say "no." The "ayes/noes" have it and the motion is adopted/lost."*

Rising vote (not counted): *"Those in favor will rise. Thank you, be seated. Those opposed will rise. Thank you, be seated. There is a majority (or 2/3) in the affirmative and the motion is adopted." Or "There is less than a majority (or 2/3) in the affirmative and the motion is lost."*

Methods of Amending:

By striking out: “I move to amend by striking out the word “Denver.” (*before/after?*)

By inserting: “I move to amend by inserting the word ‘Las Vegas’ after the word ‘Portland’ and before the period.”

By striking out and inserting: “I move to amend by striking out the word ‘\$35’ and inserting the word ‘\$50.’”

Helpful Terminology:

- Recommendations, bylaws, rules, resolutions, budgets, and audits are **adopted**.
- Reports are **filed**.
- Resignations are **accepted**.
- Bills and minutes are **approved**
- If corrections were made to the minutes, the minutes are then **approved as corrected**.
- Treasurer’s statement is neither approved nor adopted; but after questions are answered regarding any item as reported, it is placed on file for audit as stipulated in the bylaws.
- Motions are recorded as **“adopted” or “lost.”**
- It is highly recommended that main motions be put in writing (dated and signed). If so, number motion slips and note on the slips whether the motion was “adopted” or “lost.”

Robert's Rules Help Get Things Done!

- *Make Motions – that are in order*
 - *Obtain the floor — properly*
- *Speak – clearly and concisely*
- *Obey — the rules of debate*

And most of all be courteous! That's always in order!

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