

Kentucky PTA Leaders' Notebook for PTAs and PTSAs 2014 – 2015

A Kentucky PTA Publication

Important Requirements for all PTAs and PTSAs

All PTAs and PTSAs must comply with the following requirements:

- Make at least one membership dues payment no later than October 15 and monthly thereafter if dues are collected;
- Pay district dues according to your district's bylaws (if you currently do not have district leadership, send your district dues to the Kentucky PTA office);
- File 990 Tax Form with IRS by Nov. 15th and send copy to Kentucky PTA.
- Have your bylaws renewed every five (5) years; and
- Send a copy of your PTA's or PTSA's financial review to Kentucky PTA by August 15.

All Kentucky PTA and National PTA awards and scholarships are given only to PTAs and PTSAs in good standing. If you have not paid dues, if you have not renewed your bylaws in the past five years, if you have not sent in your financial review and filed a 990, you will not be eligible to apply for or receive any awards or scholarships. All PTAs/PTSAs in Kentucky must file Form 990, 990-EZ, or 990 N by November 15 of each year. See Part IV – Financial Matters of this publication for more information. This includes awards and scholarships for which the students, teachers, and parents of your school may apply. Please do not disappoint them.

This also applies to all Kentucky PTA and National PTA programs including the PTA insurance program. If your

The Kentucky PTA Office and Staff

Kentucky PTA employees are here to help you.

If you have any questions or need information concerning your PTA/PTSA, please call or e-mail. Kentucky PTA office personnel are there Monday through Friday, 8:00 a.m. to 4:00 p.m. ET. The staff is ready and willing to answer your questions or refer you to someone who will help you. Kentucky PTA is a resource and support for the Kentucky PTA Board of Directors, district presidents, local unit presidents and the membership. If office personnel are unable to answer your call, please leave

PTA/PTSA has applied for insurance but is not a PTA/PTSA in good standing, your PTA will be dropped from the program.

Inform your treasurer, and other officers, that dues must be submitted by **October 15** and remind the membership chair that he/she must supply the treasurer with a numbered list of members to be included with the payment.

If PTA/PTSA bylaws are due for renewal this year (or if the bylaws are past due) appoint a bylaws committee immediately and get the bylaws ready to submit. Remember that the bylaws or any amendments to bylaws must be approved by the general membership. You must include a copy of the minutes of the general meeting at which the bylaws/amendments were approved stating that a quorum was present.

Check with the audit committee and remind them that the **Financial Review** must be submitted to the Kentucky PTA office by **August 15**. **Reminder:** The review must be completed before the treasurer can take charge of PTA/PTSA funds.

The names, addresses, phone numbers and e-mail addresses of your PTA's/PTSA's officers must be sent to Kentucky PTA by **June 1** every year, even if they are the same as the previous year.

If you have any questions or need help with any of the above, do not hesitate to call Kentucky PTA 502-226-2207 or e-mail kentuckypta@bellsouth.net.

a message and your call will be returned as quickly as possible.

The Kentucky PTA office may be contacted by
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