



## 71<sup>st</sup> Annual Spring Conference/P&P Recap 2022

On behalf of the Suffolk Region Field Support Team which consists of an Associate Director, Bylaws Chair, Membership Chair and six (6) Assistant Directors (AD's) who are liaisons between/amongst Suffolk Region, and a local PTA, PTSA and SEPTA Unit. Each AD is assigned by School District. No AD is assigned to their own school district to ensure confidentiality. Please go to [www.suffolkpta.org](http://www.suffolkpta.org) using the contact tab for either Bylaws, Membership or the specific AD assigned to your Unit for any assistance, a supportive ear, or guidance.

To be a PTA Unit in good standing the following must be adhered to:

- Twenty-Five (25) members or greater
- Annual insurance coverage paid
- Membership dues paid
- By-Laws are reviewed and approved within the last three (3) years

After your elections are completed below is a brief list of items to incorporate into your planning for the upcoming school year:

- **Insurance Coverage** to be paid - paperwork is sent by Associate Insurance Management, Inc. (AIM)
  - Contact Information: PO Box 742946, Dallas, Texas, 75374-2946 Telephone 1-800-876-4044 or 214-360-0802 email: [aim@aim-companies.com](mailto:aim@aim-companies.com)
- **Membership Dues** are paid as the unit receives them and posts the membership information into Memberhub. Recommended that you have your members utilize Memberhub to make a payment (note: make sure to use the 2022-2023 school year tab).
- **Bylaws** are renewed every three (3) years. Review the unit's current Bylaws to determine if a committee needs to be established if the Bylaws are about to expire within 6 months or less or within the new school year. Please go to the NYSPTA website [www.nyspta.org](http://www.nyspta.org) and the Bylaws tab (Bylaws Wizard) for guidance. Please also upload a copy of your Bylaws to the document page of your Memberhub to enable easy access, for reference, and to maintain historical information.
- **IRS 990 Forms** – All Units regardless of the amount of funds within the unit's checking account must file annually by November 15<sup>th</sup> an IRS 990 form. Information and guidance can also be found on the NYSPTA website. Please also upload a copy of your 990 form, and IRS acknowledgement documents onto your Memberhub's document page to enable easy access, for reference, and to maintain historical information.
- **NYS Tax Exempt Form (ST-119.1)** – Can only be used for the Unit/Council's business. It **may never** be shared with any other outside organization as it puts the unit's/council's 501(c) 3 status in jeopardy.
- **New Elected Officer's Form A** – Please enter within Memberhub the incoming officers for the next school year (please make sure it is the 2022-2023 school year). Please make sure to include full name, full mailing address, email address and contact telephone. This information is critical for the communication success from the National, State and Suffolk Region PTA Levels.
- **Annual Budget, Approval by Unit Membership and Adoption** – A annual budget is to be created, presented at the first meeting of your membership, discussed, and voted (must have a quorum for voting - see Bylaws), a motion to be made, voting to commence, and voting information captured in the meeting minutes as the budget being adopted.

- **Monthly Treasurer and Meeting Minutes** – At each meeting of your unit, a treasurer’s report needs to be presented identifying all revenue and expenses that have occurred. If there are revisions required, then the treasurer’s report is filed for Audit. The meeting minutes need to be distributed at each meeting as well, reviewed and voted upon for adoption (note: a revision may be required and that is noted as well).
- **Monthly Audits of the Checking Account, Bank Statement and Treasurer Report** -This is a requirement of the insurance coverage. The President needs to identify an individual to review the books (must not be a signatory on the checking account). This unit member will sign/initial in the check book the monthly review and report to the membership the reconciliation findings for each month. An Audit Committee needs also to be formed to manage the review and closing of the books for the school year.

Please make sure to put into your annual unit budget funds to enable unit members to attend the following: (Event planning is underway, therefore the below list may change. Stay Tuned!)

**Suffolk Region/NYSPTA**

Description
Arts-In-Education Showcase
Fall Conference Training
NYS PTA Convention
Reflections
President’s & Principal’s Dinner
Winter Workshop Training
NYSPTA Legislative Forum
Mental Health Summit
Eastern Suffolk BOCES Dinner
Western Suffolk BOCES Dinner
Reflections Showcase
Spring Conference
Officer Roundtable Training
National PTA Convention & Expo
NYSPTA Summer Leadership Training
Suffolk By the Sea Training

Please remember Suffolk Region PTA is here to support your needs. We are only a phone call or email away. It is sometimes best said to seek guidance before taking any uncertain action.

Thank you for your volunteer work and wishing you all much success!

Best Regards Always,  
 Laura Paehr  
 Associate Director

“Shining A Light”

