

SOUTH CAROLINA PARENT TEACHER ASSOCIATION



SCPTA 2016 ANNUAL CONVENTION

WORKSHOP SESSION 1

10-10:40 AM KEEPING TRACK OF PAPERWORK

(ALL FORMS ON SCPTA WEBSITE UNDER PTA FORMS)

WHAT: LOCAL OFFICER REPORT FORM

WHY: SCPTA OFFICE USES THE CONTACT INFORMATION TO COMMUNICATE

WHEN: BY MAY 31 OF CURRENCT PTA YEAR OR ASAP IN NEXT PTA YEAR

HOW: SCAN, FAX OR MAIL-MAKE THE WRITING CLEAR

WHO: THE SECRETARY TYPICALLY

WHAT: LOCAL OFFICER MEMBERSHIP FORM

WHY: TRACK MEMBERSHIP-USED FOR YEAR END AWARDS

WHEN: MONTHLY

HOW: SCAN, FAX OR MAIL-ALWAYS CHECK MATH

WHO: THE MEMBERSHIP CHAIR/TREASURER/PRESIDENT

WHAT: LOCAL UNIT BYLAW

WHY: TO MANAGE A SUCCESSFUL YEAR/POLICY AND PROCEDURE

WHEN: EVERY 3 YEARS

HOW: SCAN, FAX OR MAIL-MAKE THE WRITING CLEAR

WHO: BOARD/APPROVAL OF GENERAL MEMBERSHIP

WHAT: FISCAL YEAR END REPORTS – BUDGET, FINANCIALS

WHY: FOR UNIT COMPLIANCY

WHEN: BY OCTOBER 1 OF EACH YEAR

HOW: SCAN, FAX OR MAIL-MAKE THE WRITING CLEAR

WHO: TREASURER/PRESIDENT

WHAT: IRS 990

WHY: FEDERAL COMPLIANCY FOR NON-PROFIT

WHEN: NOVEMBER 15 OF EVERY YEAR

HOW: SUBMIT BY MAIL TO THE IRS

WHO: TREASURER

Q&A

ADVOCATE

EDUCATE

SUCCEED