



Steps to Establish a New PTA/PTSA Unit

1. **Apply for your Employer Identification Number (EIN).** You can apply online using the website below. As soon as you receive your IRS letter with your assigned EIN, contact your District President or the State President so she can work with the State PTA Treasurer to have your EIN added as a subordinate under the State PTA's non-profit status.

<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>

2. **Create a Nominating Committee** (3-5 people) to identify a slate of officers to serve as the PTA's Executive Board. The Committee must identify volunteers to serve as President, Secretary, and Treasurer.

- To identify interested persons, the Committee can use the Nominating form provided or spread the word through social media, the school's website, weekly eblast, etc. The Committee may also choose to host an informational meeting (in-person or via Zoom) for those who might be interested. The Principal can often provide helpful suggestions since they know many of the parents.
- Once the Committee has a list of interested volunteers for each position, they should review them as a group, interview individuals if there is more than one person for any given position, and vote on the proposed slate of officers.
- The names, phone numbers, and email addresses for the slate of officers should be sent to office@scptal.com so the Board can vote to approve them. The minutes documenting this vote will be needed to establish authorized signers on the bank account.
- The President will then contact the newly-approved officers to welcome them, make arrangements for training, and provide any other support that may be needed.

3. Once you have obtained your EIN, **open a PTA bank account** at a conveniently located financial institution. Be sure to take the meeting minutes containing your newly elected officers and documentation of your EIN. You may also be required to show proof of your tax-exempt status in the form of the State PTA's letter of determination.

4. Once you have obtained your EIN and your Board has been elected, State PTA will **create a profile for your unit in Givebacks**. Givebacks is the platform used by all PTAs in South Carolina for communication, paying State/National membership dues, and submitting compliance requirements.

- Each officer should create their own login by going to Givebacks.com, clicking Login in the upper right corner, and selecting Create an Account.
- Givebacks can be used to track memberships, sell memberships and other items through the online store, send out eblasts to families, and host fundraisers.

5. Your Board will need to **establish the bylaws** that govern your PTA unit's activities. The fillable template for the bylaws can be downloaded from www.scpta.org/bylaws/.

6. Your Board will also need to **create a budget** for the year. You should seek input from parents and school administrators regarding potential fundraisers and anticipated expenses. The budget process will help clarify your focus and activities for the year. Once a draft budget is developed, your Board will need to vote to approve that budget.

7. Your unit should begin accepting new members and planning events to spread the exciting news about your new PTA unit among your school population and the community.

Additional detailed information, along with individual support to help get your PTA unit up and running, is available from your State PTA Board. Please contact office@scpta.org for more information.