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 CURRENT 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 COMPLIANCE
WHEN: BY OCTOBER 1 OF EACH YEAR
HOW: SCAN, FAX OR MAIL—MAKE THE WRITING CLEAR
WHO: TREASURER/PRESIDENT

WHAT: IRS 990
WHY: FEDERAL COMPLIANCE FOR NON-PROFIT
WHEN: NOVEMBER 15 OF EVERY YEAR
HOW: SUBMIT BY MAIL TO THE IRS
WHO: TREASURER

Q&A
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