

**SOUTH CAROLINA**

**PTA<sup>®</sup>**

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*End of the Year Duties for Presidents  
Martha C. Knight, SCPTA President  
2013 SCPTA Convention  
May 4, 2013*

## *Nominations and Elections*

- *Follow the local unit bylaws to make sure the nominations and elections are/were conducted at the time and manner described in the bylaws.*
- *Conduct elections at regular membership meeting.*

## *Local Unit Officer Report Form*

- *Complete the 2013-2014 Local Unit Officer Report Form by May 31, 2013, and send a copy to the SCPTA office.*
- *Include email addresses for the board so they will receive the monthly Bulletins and other e-blasts from SCPTA and National PTA.*
- *This form should be sent to the SCPTA office even if all of the officers are the same. The executive director will not know that if she does not get the form!*
- *A copy of the form is on the SCPTA website: [scpta.org](http://scpta.org)*

## *Bylaws*

- *The local unit bylaws is the official document that connects the unit to SCPTA. SCPTA is required to have a current bylaw document for each affiliate as a part of the IRS regulation for 501.c.3 status ... and thus, enables the local unit to be a tax exempt association.*
- *Make sure that the local unit bylaws are current. The date of the last approval is on the copy. Bylaws must be renewed every 3 years.*
- *If needed, get an official blank copy from the SCPTA office.*

## *Financial Review*

- *Select a financial review committee and follow the procedures for completing the Financial Review as outlined in the CD: SCPTA Leaders' Tool Kit in the Treasurer's Section. The CD is located on the SCPTA website: [scpta.org](http://scpta.org)*
- *Send a copy to the SCPTA office.*
- *A financial review is a requirement for all affiliates of SCPTA for 501.c.3 status.*

## *Preparations for the Next Year*

- *Using the local unit bylaws to determine the dates for the PTA membership meetings and PTA board meetings.*
- *Give those dates to the principal to include them on the next year's list of dates for the school.*
- *Ask to be included in the next year's event that may be held before school opens for parents to pay fees. Some call it the "Back to School Night" or "Orientation."*
- *Have flyer about the PTA and offer membership in PTA.*

## *NPTA's Back to School Kit*

- *As part of the local PTA's benefits, NPTA offers a free Back to School Kit for each PTA in South Carolina.*
- *If the Local Unit Officer Report Form has been completed and sent to the SCPTA office, the president gets a message in the SCPTA Bulletin or e-blast to go to the NPTA website to request the kit.*
- *The kit is free to each PTA each summer. It contains publications and flyers to use by PTA leaders.*

## *SCPTA Leadership Training*

- *Make plans for the PTA board members to attend the SCPTA Leadership Training in July.*
- *All who attend will be given a copy of the CD:SCPTA Leaders' Tool Kit.*
- *Local PTA members are also welcomed and encouraged to attend.*
- *Membership cards are issued at this Leadership Training.*

## *Membership Cards*

- *NPTA requires each state PTA to be accountable for all membership cards.*
- *SCPTA requires each local unit to be accountable for all membership cards.*
- *Check on the number of cards issued to the local unit and the number of cards paid for with dues sent to SCPTA.*
- *If a local unit got 100 cards and sold 86, then the local unit must account for the remaining 14 by either sending back the 14 to SCPTA or paying for the 14 @ \$3.25 each.*

## *Summer Planning*

- *Have the board evaluate the activities and programs of the previous year.*
- *Set a date(s) to have board meetings to plan for the next school year: PTA programs, events, fundraisers, membership campaign, etc.*
- *Make plans for activities and programs for the next year.*
- *Work with the principal so that he/she can help the board to promote the plans.*

## *Transition from One Administration to Another*

- *Outgoing officers and committee chairmen should meet with their successors.*
- *Turn over all PTA materials and resources that relate to the positions.*
- *If possible, ask the principal for a place at the school for a locked PTA filing cabinet so that all PTA records make be kept in a secure place.*

## *Items Needed for a Unit in Good Standing*

- *The following items must be completed **every year** for a unit to be a Unit in Good Standing:*
  - Adhere to the Purposes and basic policies of the PTA*
  - Remit the national and state dues to SCPTA monthly*
  - Maintain current bylaws; send in any revisions to SCPTA for approval.*
  - Send to SCPTA office by October 1: a copy of the financial review from the previous year and a copy of the budget for the current year approved by the membership.*
  - Send to the SCPTA office a copy of Local Officer Report Form*
  - Submit monthly membership forms with national and state dues sold that month; submit a monthly report with zero amount if no dues were sold that month. Reports due at the end of each month.*
  - Submit a copy of the IRS form 990 to the SCPTA office by December 1; this form must be filed with the IRS by November 15.*

# QUESTIONS?

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