

# SOUTH CAROLINA **PTA**<sup>®</sup> *everychild.one voice.*<sup>®</sup>



**Membership and Field Services**  
**SCPTA 92<sup>nd</sup> Annual Convention**  
**March 14, 2015**

# Agenda

- **Terms for unit in “good standing”**
- **End of the year procedures including return of unused/damaged membership cards**
- **Best practices in developing and executing successful membership campaigns**
- **Membership benefits, awards and programs**

# Units in “Good Standing”

- 1) **Bylaws (expire every 3 years)**
- 2) **Local Unit Officer Report**
- 3) **Monthly Membership Dues Report**
- 4) **Financial Review Report & Checklist**
- 5) **IRS form 990/990-N**



# End of the year procedures



- 1) Submit membership dues report monthly**
- 2) Return unused/damaged membership cards to SCPTA office by May 31<sup>st</sup>**
- 3) Discuss next school year's membership theme with incoming membership chair and/or PTA President**
- 4) Celebrate your success**

# Best Practices



## Georgia PTA:

**Community Wide Back to School Jam** – PTA engaged businesses to donate venue for event and school supplies that were given away to students

- Total attended event 3,000+
- 995 new PTA members enrolled; as parents and students received free back packs filled with school supplies, membership recruitment ensued
- Used one of National Standards for Family-School Partnerships (“Collaborating with Community”) as guide for this membership initiative

Source: NPTA 2012 Membership Workshop  
Best Practices: Membership Campaigns From Concept to Completion

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# Best Practices (cont.)

## South Carolina PTA:

Summerville High School used the Student Council as a means to successfully increase student membership

- PTA provided student with incentives to join and to also get fellow classmates to join



## Local Unit PTA/PTSA: Membership Ideas

# Benefits of PTA Membership for Local Units



Numerous benefits are available to dues-paying units and members.

*Our Children*  
magazine

Discounts and special  
offers from a host of  
PTA Member Benefits  
Providers

Teacher  
Appreciation  
Week Ideas

Back-to-School  
kit

Professionally  
designed public  
service  
announcement  
(PSAs)

Resources developed  
in collaboration with  
PTA's national  
partners

Resources on parent  
involvement programs,  
fundraising, working  
collaboratively and  
more

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# Benefits of PTA Membership for Individual Members

Individual members have access to a number of exclusive benefits too, including:

Online parenting resources

Exclusive National PTA member benefits & sponsor offers

Discounted member rate for PTA's annual national convention

Leadership training opportunities

E-newsletters on parenting and legislative issues

Member-to-Member Network



# 12,000 & Counting SCPTA Membership Challenge

A flyer for the SCPTA Membership Challenge. The background is blue with white and yellow floral patterns. The text is in yellow and white. The top section says "12,000 & COUNTING" in large yellow letters. Below that, "SCPTA MEMBERSHIP CHALLENGE" is written in white. The South Carolina PTA logo is in the center, with the tagline "everychild.onevoice.®". The main text describes the challenge: "For the next 12 weeks, beginning January 12, 2015, local units have an opportunity to win 1 of 3 prizes!! For every 12 members you recruit, your local unit will receive one entry. No entry forms required." The deadline is "Friday, April 3, 2015" and the drawing is on "Monday, April 6, 2015!!". The prizes are listed: "1ST PRIZE: FREE REGISTRATION TO THE 2015 NATIONAL PTA CONVENTION IN CHARLOTTE, NC", "2ND PRIZE: \$100 CASH", and "3RD PRIZE: \$50 CASH". A note states "LOCAL UNITS MUST BE IN GOOD STANDING WITH SCPTA IN ORDER TO PARTICIPATE." At the bottom, contact information is provided for SCPTA.

**12,000 & COUNTING**

**SCPTA MEMBERSHIP CHALLENGE**

**South Carolina PTA**  
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For the next 12 weeks, beginning January 12, 2015, local units have an opportunity to win 1 of 3 prizes!! For every 12 members you recruit, your local unit will receive one entry. No entry forms required.

**Deadline: Friday, April 3, 2015.** Drawing will be held on Monday, April 6, 2015!!

**1ST PRIZE: FREE REGISTRATION TO THE 2015 NATIONAL PTA CONVENTION IN CHARLOTTE, NC**

**2ND PRIZE: \$100 CASH**

**3RD PRIZE: \$50 CASH**

**LOCAL UNITS MUST BE IN GOOD STANDING WITH SCPTA IN ORDER TO PARTICIPATE.**

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COLUMBIA, SC 29201

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# Membership Awards



- ❖ Oak Leaf Award
- ❖ Palmetto (Bronze, Silver, Gold, Platinum)
- ❖ 100% Membership
- ❖ Top 10 – Highest Percentage of Members per enrollment
- ❖ Top 10 (highest number of members)
- ❖ 500 Member Club
- ❖ 1000 Member Club

# Membership Awards

SOUTH CAROLINA PTA



## South Carolina PTA 2012-2013 Goals Sheet

Purpose: To motivate and educate our members so that they may understand the entire parent-to-teacher-student program and to assist the local unit in promoting a well-balanced program in keeping with the Mission, Vision, Values, and Purpose of PTA.

Name of Local PTA/PTSA Unit \_\_\_\_\_

School Address \_\_\_\_\_

City \_\_\_\_\_, SC Zip Code \_\_\_\_\_

School Website \_\_\_\_\_ PTA District # \_\_\_\_\_ Council \_\_\_\_\_

Name of PTA President \_\_\_\_\_ Phone # \_\_\_\_\_

Email Address of PTA President \_\_\_\_\_

### SCPTA Oak Leaf Award Levels

Platinum Leaf Award	40 points	Silver Leaf Certificate	24 points
Gold Leaf Award	32 points	Bronze Leaf Certificate	16 Points

### Goals Criteria

(48 possible points)

All questions must be answered and all blanks filled in. Incomplete entries will result in disqualification. One point will be granted for each "yes" answer, except where otherwise indicated. Deadlines for entry is postmarked by March 1<sup>st</sup>.

**UNITS MUST MEET THE "YES" REQUIREMENT ON THE STARRED ITEMS BELOW (OUR SYSTEM IS BLIND) MUST ACCURATELY COMPLETE THE ACCOMPANYING LABELS TO BE ELIGIBLE FOR AWARDS.**

#### Local Unit Operations

- Yes  No \*1 A (New Units only) - Was the local unit's bylaws filed and approved by the SCPTA Bylaws Chairman before March 1<sup>st</sup>? Date Bylaws Approved: \_\_\_\_/\_\_\_\_/\_\_\_\_  
B (Existing Units only) - Was the approved date on the local unit's bylaws within the last three years and after March 1, 2010? Date Bylaws Approved: \_\_\_\_/\_\_\_\_/\_\_\_\_
- Yes  No \*2 Is the local unit's EIN on file with the annual filing? List EIN Here: \_\_\_\_\_
- Yes  No \*3 Were the local unit's officers and chairmen elected in accordance with the local unit's bylaws?
- Yes  No \*4 Did the local unit's board hold an annual planning meeting before the start of the school year?
- Yes  No \*5 Did the local unit submit to the state PTA office by October 1<sup>st</sup> a copy of the SCPTA Financial Review Report and the unit's final budget report following the end of the 2011-2012 fiscal year?
- Yes  No \*6 Did the local unit submit to the state PTA office by October 1<sup>st</sup> a copy of the 2012-2013 budget, prepared and adopted by the general membership in accordance with the unit's bylaws?  
*Note: The budget also includes a special title page for the board to amend the SCPTA Convention, Summer Leadership Meeting, the Legislative Conference, District conference and any other scheduled SCPTA meetings.*
- Yes  No \*7 Did the local unit file a Form 990, Form 990-EZ, or Form 990-N (if not taxed) with the IRS by November 15<sup>th</sup> and submit a copy to the state PTA office by December 1<sup>st</sup>?
- Yes  No \*8 **Did the local unit submit a Monthly Local Unit Membership and Dues Report form for the months of September through February to be eligible for awards?**
- Yes  No \*9 Did the local unit plan and promote a PTA membership campaign, reaching out to families, students (for PTSA's), faculty and staff, and local community members?
- Yes  No \*10 Did the local unit see an increase in PTA membership from the previous year?

1825 Henderson Street  
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## ❖ Oak Leaf Award

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# Membership Awards

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## 2012-2013 MONTHLY LOCAL UNIT MEMBERSHIP & DUES



Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

PTA/PTSA Name (as indicated on your Bylaws or Charter) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_, SC Zip \_\_\_\_\_

10 <sup>th</sup> Day Student Enrollment		Non-Faculty Members Enrolled this Report	
Number of Certified Faculty		Faculty Members Enrolled this Report	+
PTA Local Unit ID #		TOTAL Members Enrolled this Report	=
Unit Federal EIN		(State dues = \$1.00, National Dues = \$2.25)	x \$3.25
Bylaws Expiration	/ /	<b>TOTAL MEMBERSHIP DUES</b> this Report	=
School County		Founders Day Donation*	+
SCPTA District #		SCPTA Historic House Preservation Fund Donation*	+
SCPTA Council <i>(for Districts 1 and 9 only)</i>		Helen Stokes Memorial Scholarship Fund Donation*	+
		<b>TOTAL ENCLOSED</b>	=

(\*) Goals Sheet Items

The Membership year is April 1-March 31. To remain in good standing as a 501(c)3 non-profit organization, each unit must comply with the IRS regulation that requires an official roll of all PTA members be compiled annually. Dues reported after March 1 are considered LATE and will be applied toward next year's membership report. **A unit is considered to have obtained**

# QUESTIONS?

# Contact Information:

**Rosa Fulmore**

**VP of Membership & Field Services**

**[vpmembership@scpta.org](mailto:vpmembership@scpta.org)**

**843-735-1842**