

PTA[®]

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District 1 PTA Handbook

2015-16 Academic School Year

Greenville County Schools

Greenville, South Carolina

This handbook is for PTA use only. Please do not distribute it for commercial or solicitation purposes

SCPTA District 1 PTA Board of Directors

8/1/2015



PTA Mission

The overall purpose of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA Values

Collaboration: We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.

Commitment: We are dedicated to promoting children's health, well-being, and educational success through strong parent, family, and community involvement.

Accountability: We acknowledge our obligations. We deliver on our promises.

Respect: We value our colleagues and ourselves. We expect the same high quality of effort and thought from ourselves as we do from others.

Inclusivity: We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.

Integrity: We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

The Purposes of PTA

- To *promote* the welfare of children and youth in the home, school, community and place of worship;
To *raise* the standards of home life;
- To *secure* adequate laws for the care and protection of children and youth;
- To *bring* into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of the children and youth;
- To *develop* between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social and spiritual education.

Basic Policies of PTA

All PTA bylaws—national, state, region, district, council, and local—include the requirement to be noncommercial, nonpartisan and nonsectarian. The following policies come from www.pta.org and you can also see them at www.scpta.org

Non-commercial Policy

- PTAs are prohibited under federal law from engaging in substantial business activities that are unrelated to their tax-exempt purposes, which are legally defined as educational and charitable.
- PTAs should not endorse products, companies, or foundations.
- PTAs may accept and acknowledge contributions of sponsors of PTA programs.
- PTAs may accept advertising as long as it stays within postal regulations (no more than 10 percent of the total document, including any self-advertising, e.g., for conventions and other events) and does not jeopardize the purposes and nonprofit status of PTA.
- PTAs should familiarize themselves with local, state, and federal regulations and requirements regarding licensing and liability before sponsoring or conducting public events.

Nonpartisan Policy

The organization or members in their official capacities shall not, directly or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

Nonsectarian Policy

PTA welcomes into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. The Purposes of the PTA acknowledge the importance of a spiritual life in the development of children and youth. As an association, PTA has the right to offer inspirational messages to open or close its meetings, but such messages by PTA leaders or invited religious leaders should be inspirational rather than sectarian, recognizing that in this pluralistic nation not all members share the same beliefs. Poetry, quotations from great men and women, uplifting anecdotes, and moments of quiet meditation can be used.

PTA Standards of Affiliation

- Affiliation with National PTA – status as a Chartered Congress
- Use of National PTA service marks (including PTA® and PTSA®) in conjunction with the name of the PTA Affiliate
- Use of official PTA and PTSA logo
- Use of PTA membership database programs and activities
- Collection of membership dues
- Chartering of new units and/or other constituent organizations

- Sending voting delegates to National PTA's annual convention based on policy set by National PTA
- Access to exclusive National PTA resources, training, technical assistance and other services
- Bringing resolutions to National PTA for consideration
- Receiving funding to attend National PTA meetings, conferences, and/or annual convention
- Receiving benefits from sponsoring gifts or rewards and participation in sponsorship/member benefit programs
- Eligibility for grants and/or program participation funds
- National PTA representation at PTA Affiliate annual meetings/conventions or other events
- Participation in National PTA awards programs, including the Reflections Program

Additional information regarding Standards of Affiliation and Bylaws for local units can be found at www.pta.org

SCPTA District 1- Greenville County, SC

District 1 Board of Directors

Officers:	Name:	E-mail:	Phone:
President	Pam Driggers	District1president@gmail.com	
1st Vice President	Jerry Blassingame	jerryblassingame@gmail.com	
2nd Vice President	Carol Beard	beardcarol@bellsouth.net	640-0789 cell
Secretary	Melinda Tyson		
Treasurer	Carrie Medlin		
Asst. Treasurer	Virginia Crews		
NE PTA Rep.	Cathleen Wilson Seay		
NW PTA Rep.	Robin Broumas		
SE PTA Rep.	Colleen Barnes, Lacy Berrington		
SW PTA Rep.	Tina Clark		
Principal Representatives:			
NE PTA	Dr. Bob Palmer Greenville Middle Academy 339 Lowndes Avenue Greenville, SC 29607	bpalmer@greenville.k12.sc.us	355-5600
NW PTA	Tom Miller Berea Elementary 100 Berea Drive Greenville, SC 29617	twmiller@greenville.k12.sc.us	355-1500
SE PTA	Vaughan Overman Monarch Elementary 224 Five Forks Road Simpsonville, SC 29681	voverman@greenville.k12.sc.us	452-0600
SW PTA	Carlos Brooks Southside High School 6630 Frontage at White Horse Road, Greenville, SC 29602	cbrooks@greenville.k12.sc.us	355-8700
Greenville County School District Liaison	Sandra Welch 301 E. Camperdown Way P.O. Box 2848 Greenville, SC 29602	swelch@greenville.k12.sc.us	355-3888
Outreach Representatives:			
Legislative	Debbie Cotterman	cotterman@charter.net	
Reflections	Tammy Crum	crumta@att.net	
Health & Wellness	Catherine Puckett	cpuckett@livewellgreenville.org	
:			
Executive Director, SCPTA 1836 Henderson Street Columbia, SC 29201	Lorene Welch	lwelch@scpta.org	800-743-3782 or 803-765-0806

SCPTA Dates to Remember

- State Membership Report due on the last day of each month to welch@scpta.org (see form in membership section)
- SCPTA Bulletin articles submission due 1st day of each month

District 1 PTA Dates to Remembers

DATE		
AUGUST		
8	District 1 General Membership Meeting Summer Local Unit Training- Fisher Middle School	Membership cards are available to units
31	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
	10 th Day of School	Membership Chari – Enrollment this day determines your PTA membership goals for 100% - check with principal
SEPTEMBER		
3	District 1 Board meeting	301 East Camperdown Way
9	Reflections Training – 5:30 p.m.	Monarch Elementary School
	PTA Area Superintendent Breakfasts NW – Wed., Sept. 16, Berea High, 8:00 NE –Wed., Sept. 23, Buena Vista Elem., 8:30 SE – Tues., Sept. 29, Plain Elem., 8:30 SW – Wed., Sept. 30, J.L. Mann Academy., 8:00	
30	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
OCTOBER		
1 st	2013-14 Financial Review Packet (Approved Budget, along with Secretary's Minutes showing approval, a copy of the final bank statement & reconciliation, and the final treasurer's report) Due to District 1 treasurer and SCPTA Office. Include 990 Report if you have completed it. See D1 Treasurer's section for District 1 and Council dues forms. Mail District 1 Dues to: D1 Treasurer P. O. Box 25397-0397 Greenville, SC 29616	Attention Treasurers, Presidents and Reflections Chairs – these items must be current by Reflection deadlines; failure to comply can result in loss of 501c3 status by your local unit effective 1 month after missed dates! Don't be a victim, turn in your dues for ALL Levels! Must be submitted even if totals are zero SCPTA Attn: Lorene Welch 1826 Henderson Street Columbia, SC 29201
1	District 1 Board meeting	301 East Camperdown Way
15-16	Fall Break for Students in Greenville Co. Schools	Teacher Workdays and Parent Conferences
23-31	Red Ribbon Week	PTA Presidents should receive information from Greenville Family Partnership
31	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
30	District 1 Reflections Turn-in Day to Fisher Middle School – First Day	
NOVEMBER		
1	District 1 Reflections Turn-in to Fisher Middle School – Second Day	
5	District 1 Board Meeting – 301 E. Camperdown Way	
15	PTA IRS Tax form deadline. DO NOT MISS THIS DATE!!!	MUST BE SIGNED BY PREVIOUS YEAR TREASURER AND PRESIDENT
25-27	Thanksgiving Break	Greenville County Schools Closed
30	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
DECEMBER		
4	District 1 Board Meeting	301 East Camperdown Way
21-JAN.1	Schools Closed for Winter Break	
Early January	Select your nominating committee	President should select a chair & chair select the committee
7	District 1 Board Meeting	301 East Camperdown Way
30	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
FEBRUARY		
4	District 1 Board Meeting	301 East Camperdown Way
7	State Reflections Deadline	Turn in at Columbia, SC Office
17	PTA Founders Day	
28	Local Membership Dues/Report due to SCPTA	301 East Camperdown Way
MARCH		

2	State Reflections Winners Announced	Winners sent to Nationals
28	Spring Break Begins	Greenville County Schools Closed
31	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
APRIL 7	District 1 PTA Board Meeting	301 E. Camperdown Way
15-16	SC PTA Convention	Goose Creek High School, Berkeley County, SC
MAY	Start planning for next year	Outgoing and incoming president
4	National Reflections Winners Announced	
2-6	Greenville County Teacher Appreciation Week	Volunteer Chair
late	New PTA Board member election/officer installation	Outgoing and incoming boards (plan a transition meeting)
31	2015-16 Local Unit Officer Report due	Incoming President's Responsibility
31	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero
JUNE		
1	Local PTA Unit Financial Review Change Signature Card at Bank	Outgoing Treasurer Incoming Treasurer & President
2	Last Day of School for Students	
30	Local Membership Dues/Report due to SCPTA	Please submit even if totals are zero
30- JULY 3	2016 National PTA Convention	Orlando, Florida
JULY		
1	New PTA term begins	New officers and board begin their term in office
31	Local Membership Dues/Report due to SCPTA	Must be submitted even if totals are zero

Confidentiality

This book is for PTA use only. Please do not use, lend or distribute it for any commercial or solicitation purposes. Any information about students that you are privy to should be held in the strictest of confidence, whether it is their home address or phone number, parents' names or numbers, students' grades or disciplinary problems or home life. It is important that PTA board members and volunteers understand that the need for confidentiality is vitally important. No matter how legitimate the request, if it comes from outside PTA, you cannot share information about students without the permission of the school and/or the student's parent or guardian, even if it is good news. When releasing information to the media, be sure that you are allowed to use the student's name. Your school should have on file the names of students whose parents or guardians have refused permission for their child's name to appear in publications outside of the school. **Always check.** You may become aware of school or district information before it is publicly announced or that will never be announced. You are in a position of trust. Working relationships with administrators, faculty and staff depend on your discretion. Do not feed the rumor mill. Ask your principal for the facts and then act appropriately with the information you are given.

Past Local Unit Information and Recordkeeping

It is an excellent idea for you to read through past minutes, treasurers' reports, by-laws, and notebooks from your unit. This will help you understand what has been done in the past. Your bylaws should clearly define the dates and time of your regular meetings, as well as the required officers and chairs of your PTA. The officers and chairs should review files from previous years, also. If there are no past files it is time to begin them. Your PTA handbooks are the most useful tool you have. Follow the instructions closely. Work with each chair, plan ahead, follow your bylaws, and have even better communications between your PTA and your school. If you have questions contact your council board members, the school district PTA support specialist, or SCPTA. It's recommended that you have a locked file cabinet for all local unit officer records and materials to be kept. Financial records should be kept in a fire safe area and follow IRS guidelines for years of records kept.

Dues and SCPTA Membership Report Form

National PTA dues are \$2.25 per member. SCPTA dues are \$1.00 per member. Your unit should submit a *monthly* membership report to the state office beginning July 31, even in months when you have no new dues collected. Send both the national and state portion (\$3.25 total per

membership sold) to SCPTA in Columbia using the SCPTA 2014-15 Local Unit Membership & Dues Report form in the local unit handbook or online at www.scpa.org.

District 1 PTA dues are tiered and based on each local unit's **total** number of paid members from the **previous** school year (based on SCPTA records). This tiered structure is new beginning in the 2014-15 school year and coincides with the restructuring of District 1 PTA to eliminate council boards based in the four geographic areas of the county (Northeast, Northwest, Southeast, Southwest). Local units will now submit dues only to the state (for national + state portion) and district.

The tiered scale is:
< 100 members or new unit: \$10
101-200 members: \$20
201-500 members: \$60
501+ members: \$100

This simplified dues structure will provide funding for annual Superintendent's breakfasts, training sessions, the Reflections arts program, and summer school scholarships for deserving Greenville County students.

Pay District 1 dues **NO LATER THAN December 1**. Only units that have paid both district AND state/national dues may advance Reflections entries to the district or state round of competition.

Each local unit should have received a paper invoice included with their membership card packet prior to the start of the school year. Any questions may be directed to the treasurer at D1PTAtreasurer@gmail.com. Send invoice with payment to: District 1 PTA Treasurer, PO Box 25397-0397, Greenville, SC 29616. Make checks payable to District 1 PTA. **See back pages of handbook for district dues reporting forms and SCPTA Membership & Dues Report Form.**

Goals Sheet

Local Unit Presidents receive a copy of SCPTA's Goals Sheet. Tool Kit. Use this as a tool when planning for the year. This sheet is due to SCPTA each year. PTA units earn points toward gold, silver or bronze leaf awards.

Publicity

Use school newsletters, marquees, and local newspapers to publicize the wonderful things your PTA does. Remember that all documents sent from PTA should look professional, be grammatically correct, and be factually accurate. If at all possible your local unit's PTA logo should be included. Contact District 1 PTA or your PTA council for an electronic form of the logo.

Bylaws

PTA bylaws must be updated every three years. Bylaws must be current by **February 1** to submit Reflections entries or by **March 1** to participate in SCPTA's awards program. Check to determine your last bylaws update. When bylaws are updated copies should be sent to District 1 PTA president, and Greenville County Schools PTA Support Specialist. There is a suggested procedure for updating bylaws in the SCPTA website. Check with SCPTA for additional information.

Membership

The **Parent Teacher Association (PTA)** is the largest child advocacy association in the nation and has been connecting parents to their children's education for over 117 years. National PTA and its members have fought for significant programs and legislation for America's youth such as: the creation of Kindergarten classes, child labor laws, public health service, hot and healthy lunch programs, juvenile justice system, mandatory immunization, arts in education, and school safety. By joining this association, parents, teachers, and community members continue the tradition of service to our youth. PTA is NOT a fundraising organization; we are an association that advocates for children and families. Raising funds may be necessary to *provide* services to children and families. Do not raise funds without a purpose. A rule of thumb is to provide THREE (3) programs for every fundraiser you host

But why should potential members join your PTA? Active parents can still volunteer at school without joining the PTA. Make sure your Board is relaying a positive message to families and teachers about why you need them. Before you mention your successful fundraisers, make sure you tell what programs/services your PTA is providing the school (Teacher Appreciation events, reading programs, Family Pottery nights, clothes and/or food banks, running clubs, Watch D.O.G.S., supplies, etc.).

Every Board member should have their own "elevator speech" that succinctly states why *they* joined PTA and welcomes others to join. Example: "I joined PTA because I wanted to be involved in my child's education. I wanted to help my teachers by providing them the support & resources they needed to help not only my child, but the entire classroom. Through PTA, I have learned much more about how the school & district operate and how policies affect our classroom and my child. By being involved, I can have a long-range, positive effect on my school and beyond for years to come. I care about the future of **our** kids. Joining PTA shows your child, teacher, principal and superintendent that you care too."

Schools should strive for 100% membership or even more. This means one PTA membership per student based on the 10th day enrollment number. All schools should achieve 100% faculty membership. This is based on the number of accredited teachers on staff (check with you office for that count after the 10th day as well). Work with your principal to achieve this goal together. Make your membership drive as important as or more important than your first fundraiser. Offer incentives (Roper Mountain Science Center passes, luncheons for teachers, etc.). Your membership drive is **NOT a fundraiser!** Keep your local dues as low as possible to encourage participation (\$5 is the average). Any funds collected above the national, state, and district level should be used for member services **including** training of officers.

The number of membership cards your unit receives for 2014-15 is based on the total membership figure for your school on file with the state office for the 2013-14 school year. Your unit is responsible for submitting the national + state dues for ALL membership cards initially allotted to your PTA – NO MEMBERSHIP CARDS WILL BE RETURNED TO THE STATE OFFICE THIS YEAR. You are encouraged to sell more than your allotment – the strength of any organization lies in the continuous influx of new members!

Remember that Membership Reports are due MONTHLY to the state office – even for months when no memberships were sold. Due to the IRS regulations for 501-3c non-profit organizations, we are required by law to maintain a list of members. That means we need a name & address for every PTA member. School addresses may be used for teachers or privacy reasons, but please, not for all members.

Schools failing to report every month will not be eligible for state awards at convention. Back-to-school is an extremely busy time for most schools and PTA leadership understands that. All effort should be made to submit at least one dues check to the state office no later than the September report (due Sept. 30).

Programs

Attendance is always best when students are involved with the program. Please try to adhere to these meeting night guidelines: **2nd Monday—elementary schools; 3rd Monday—middle schools; 4th Monday—high schools.** If you must vary, check with your feeder schools to be sure there are no scheduling conflicts. Go to a Tuesday if there is a holiday or to the first or fifth Monday if not being used by a feeder school. Check first.

Health & Wellness Program

For schools who would like to begin a Health & Wellness Program in their schools, SCPTA has developed some guidelines as well as a Healthy Lifestyle Program that can be put in place. It is a way for PTAs to get involved with students, parents, and teachers by communicating tips on nutrition, fitness, and overall wellness. For more information, please contact SCPTA Health & Wellness Chair or visit www.scpta.org. You may also want to get in touch with our partner in this effort at the Piedmont Health Foundation, www.piedmonthealthfoundation.org. Additional information from LiveWell is provided in the Health and Wellness Section of this Handbook.

Catherine Puckett, Schools Specialist, LiveWell Greenville, 864.238.5304, cpuckett@livewellgreenville.org

Fundraising

Fundraising is important and necessary, but it should not be the main focus of your PTA. Money raised from all Ways and Means projects should be used for the needs of the children of your school. Plan fundraising projects after the PTA has decided what the school needs. There should be a signed contract between the PTA and the vendor stating all terms of agreement as to delivery, percentage of profit and conditions of the prize program. The contract should be signed by the PTA president *after* the PTA board votes to approve the fundraiser and the vendor selection.

Volunteers

Volunteers are an integral part of any PTA; make them feel welcome. Volunteers should *always sign in and out, wear a badge, and keep a record of their "outside of school" hours.* Volunteer hours are recorded through the School Check-In system. Remind volunteers to report time spent traveling to and from school and working at home. The PTA support specialist at the Central Office can run a report of these hours for you. Find tasks to fit the volunteers' needs, including flexible times for grandparents, working parents, dads, and stay-at-home moms. Students need to see that the adults in their lives think that school and getting an education are important. Remember, only the two parents or legal guardians for a student are automatically entered into the volunteer database. All others, including new families who register throughout the year, must register at the school through the school check-in system and be cleared before they can begin volunteering. See your school's principal/designee for more information.

Distribution of Flyers at School by External Groups

Greenville County Schools has a policy on the distribution of flyers at schools. Each school's principal decides whether or not to distribute flyers from external groups. A school's PTA or feeder schools' PTAs are not considered external organizations. However, principals may choose to distribute or not distribute PTA materials as they deem most appropriate.

Reflections

PTA sponsors the Reflections arts contest each year. There are six categories: visual arts, literature, photography, music, dance choreography, and film/video production. The theme for 2015-16 is "Let Your Imagination Fly". Students in grades K through 12 are eligible to enter. Work with your principal along with your language arts and related arts teachers early each year to coordinate promoting the program and encouraging entries. Dates for Reflections are as follows for this school year: October 30 and November 1, 2015 – Turn-in dates for District 1 entries.

SCPTA Scholarships

SCPTA awards scholarships to high school graduates who are entering the profession of education. The number of scholarships awarded depends on the funds available. Please consider donating! SCPTA asks for funds from local units, either by donation to the Helen Stokes Scholarship Fund or in the form of an Honorary Life Membership. Elementary, middle or high school PTAs may sponsor applicants for this scholarship. The fee is \$25. The Honorary Life Membership award contributions may be used to sponsor a student. Applications and contributions must be sent to the SCPTA office by **March 1**. Applications and directions can be found in the SCPTA Leaders' Tool Kit.

SCPTA Honorary Life Memberships

The Honorary Life membership is a way of recognizing someone who has made a special contribution to your PTA. It includes an attractive pin. The cost is \$50. The honoree may be a member of your local unit, an administrator, a teacher, a volunteer or someone outside who has helped your unit in a unique way.

System-Wide Exclusive Beverage Contract

Greenville County Schools has a contract with Coke-a-Cola Bottling Company for exclusive beverage rights, which means a Coke product MUST be sold if Coke offers the product (including water bottles). As partners with Greenville County Schools, these stipulations apply to PTAs as well; please contact your principal with questions or for further information.

- ✓ **During the school day** – Any product sold to students by any group during the school day MUST comply with National State Boards of Education (NASBE) guidelines. Go to <http://nasbe.org> for more information.
- ✓ **After school public events on School District property** – Beverages do NOT have to meet NASBE guidelines. Groups may sell any Coke product (regular, diet, or any size) OR any products that Coke does not offer. School groups may purchase products from Coke Bottling at school system contract price.
- ✓ Donations of non-Coke beverages may ONLY be given away or provided as refreshments.
- ✓ Schools should not display any item that promotes or advertises other beverage companies.

Copier Contract

Greenville County Schools contracts with two vendors for copier and printer service each year. The Copier/Printer Program ensures the latest technology, excellent service, and a low fixed-price per copy. School groups should NOT purchase printers, copiers, toner, etc., for schools. Schools may need school groups to help pay per-page costs. Each individual school sets any reimbursement costs for copies made for school groups. Please contact your principal with questions or for further information.

Media Relations

If you are contacted by the media here are some options you should consider.

- ✓ **Collect your thoughts.** You may ask for the reporter's name and phone number. Ask for their deadline and call them back after you think of the appropriate response. You may ask the premise of the article or what questions will be asked. Don't be caught off guard.
- ✓ **Check the facts.** Call your principal or the school district's communications department. Make sure what you say is accurate.
- ✓ **Do not speculate.** If you do not know the answer or cannot find the answer refer the reporter to the district PTA president or district communications department as one who might be able to answer the question. Remain helpful and positive. It is recommended that you *do not* respond with "no comment," as its implication can seem negative.
- ✓ **Be positive.** This is an opportunity to consider representing the positives of your school, rather than providing something negative about your school, another school or the district.
- ✓ **Notify your principal.** If you do provide comments to the media, let your principal know.

After Prom Parties

It is not recommended that PTAs sponsor After Prom Parties due to the liability and lack of control over the event. Greenville County Schools has the following guidelines:

Any group wishing to sponsor an After Prom event must first contact the principal before making any plans. Parents must be made aware that donations to an After Prom event are not tax deductible.

If PTA sponsored:

- Must be provided for in the PTA budget and funded by the PTA and all normal accounting procedures followed.
- There will be NO supervision by Greenville County School District employees.
- PTA must secure liability insurance specifically for this event.
- Advertising can go out in the PTA newsletter and tickets may be sold by the PTA.
- All communication must be on PTA letterhead; no school letterhead used
- Must be advertised as a PTA event (PTA After Prom, for example); the school name must not be used.
- **PTA must secure permission forms from each attendee's parent with contact information before the night of the event.**

If Sponsored by Other Parent Group:

- Parents must chaperone the event.

- No supervision from Greenville County School District employees
- Parents can send information home, but it cannot be on school or PTA letterhead.
- The event cannot be called a PTA or school event, just "After Prom."
- No advertising in PTA newsletters and no ticket sales at school
- PTA or local school funds cannot pay for the event.
- ***It is highly recommended that the sponsoring group secure permission forms with contact information from parents before the night of the event.***

Installation of Officers

Newly elected PTA officers may be installed in a ceremony, but this formality is not necessary. Each local PTA may develop its own installation ceremony, if it chooses to have one, or adapt a borrowed one to its own uses. A sample procedure appears below.

Ask incoming officers to come forward and face the audience.

The PTA of (*school name here*) has chosen these leaders to work for children through the fulfillment of the PTA Mission which is:

- To support and speak on behalf of children and youth in schools, in the community, and before governmental agencies and other organizations that make decisions affecting children
- To assist parents in developing the skills they need to raise and protect their children
- To encourage parent and public involvement in the public schools of this nation.

(*Name each incoming officer here*) will you each work toward the fulfillment of our mission in the service of children and youth? Your answer is "I will."

The present and the future of (*school name here*) PTA now rests on your beliefs and abilities, your commitment and powers of implementation, joined to the skills of the officers who will serve with you, and the faith and help of all other members of the association. Will you pledge yourselves to these people, that service? Your answer is "I will."

Address the audience:

Members of (*school name here*) PTA, please rise (*pause*). Here are your new leaders for the coming year. They will need your encouragement and support. Do you pledge them your loyalty and your cooperation, in the names of the boys and girls of this school community? Your answer is "I do."

Address the new officers:

With a strong belief in your abilities, with renewed hope for (*school name here*) PTA, I now declare you duly installed officers for 20__ through 20__ school year.

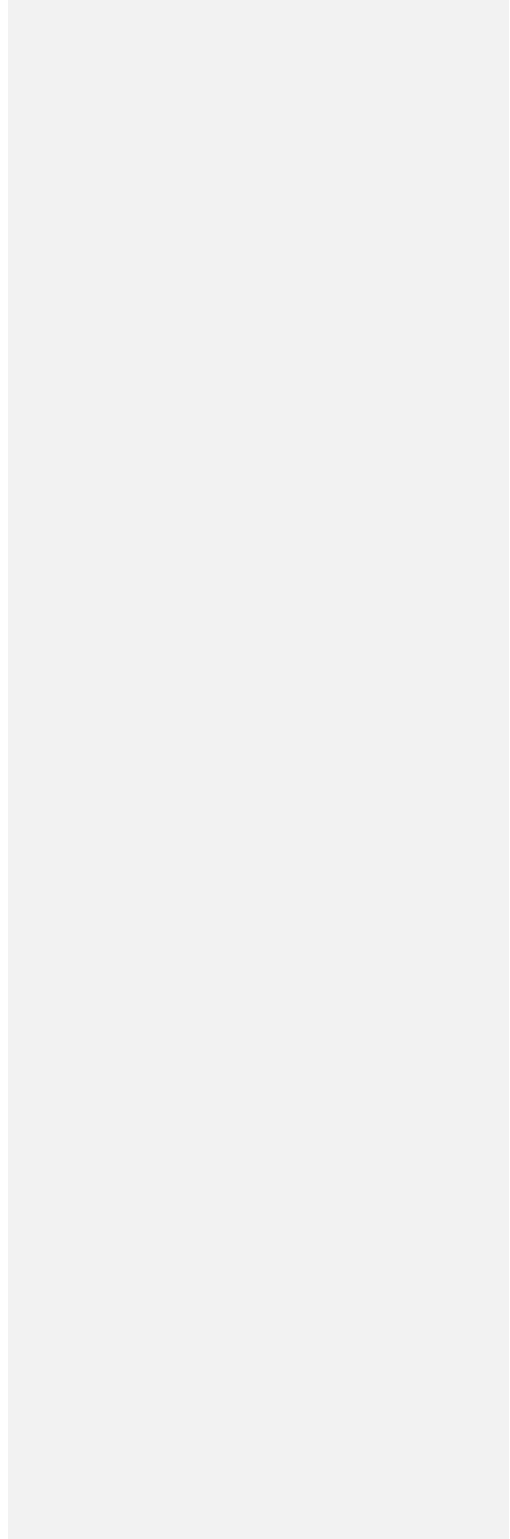
(*Initiate applause and shake the officers' hands.*)

School District Courier Mail

PTAs are welcome to use the school district's courier system at any time. Special courier envelopes are at each school. Courier mail is delivered to schools and picked up on Tuesdays and Fridays. It can take three work days from pick up to delivery; plan ahead to avoid frustration.

Bulk Mail Permit - No longer available due to budget restraints and lack of use.

Treasurer Information



Treasurer Information
IMPORTANT PTA TREASURER DATES
TO REMEMBER DURING THE YEAR

June	Prepare Financial Review	Outgoing treasurer should make arrangements to have the financial review completed. Change signature card at bank.
July 1st	PTA term begins	New officers and board begin their term in office.
Monthly – last day of EACH MO.	Membership Reports and Dues are Due	Send membership report to SCPTA, Columbia Points on Goals Sheet, mandatory for Goals Award
Oct 1st	SCPTA Dues Due District 1 Dues due to D1 Treasurer Prior year Financial Review Due to District 1 treasurer and SCPTA Office. Include 990 Report if you have completed it	To Columbia address below D1 Treasurer, PO Box 25397-0397, Greenville, SC 29616 A copy also goes to the SCPTA Office: Attn: Lorene Welch, Exec. Director 1826 Henderson Street Columbia, SC 29201
Nov 15 th	IRS Tax form deadline	To be completed by outgoing treasurer; <u>do not miss this date</u> . Your unit's 990 is due by November 15 th to the IRS. You also need to send a copy of that to the D1 Treasurer for recordkeeping. You should retain a copy as well for your unit.
March – April	This a good time to be working on a preliminary PTA budget with the incoming and outgoing boards	PTAs should be transitioning from one board to the other by conveying the necessary information to the new board members. Contracts with fundraisers should be made if your PTA is ready and goals for those fundraisers should be set in your preliminary budget.
April-May	New Officers elected and installed; preliminary budget for following school year approved	By establishing a preliminary budget, you set a list of goals for your membership to see. If amendments are required due to things that occur over the summer, these can be presented to your general membership in the fall for their approval and amend the budget accordingly.
5/31	End of Year Volunteer Report	Sandra Welch, c/o Cent. Office, after entering all volunteer hours
5/31	Local Unit Officer Report	
June	National PTA Convention	
Notes:	Good PTAs have good relations with school staff, administration and among their volunteers	Communication is the key; good recordkeeping makes volunteering easy and fun AND trouble-free

Overview of a PTA Budget

The PTA budget is an outline of estimated income and expenses for the year. A finance or budget committee usually has the responsibility of developing a budget for the PTA. This committee may be elected or appointed according to the PTA bylaws and usually consists of three to five members, one of whom is the treasurer, who may act as chair.

Developing A Budget

Effective budgeting includes consideration of the PTA's stated goals and planned activities, as well as the financial needs to achieve these.

The budget committee should study the previous years' budget(s) and treasurer's reports to determine how well that budget met the organization's needs. Next, members should determine the projected financial requirements, taking into consideration the funds needed for the approved programs, projects, and leadership development. They should determine the sources of funds to meet these requirements.

From this information, the committee then develops the annual budget. The budget should show the allocated expenditures for the year's activities, as well as the funds on the hand and the anticipated receipts. Expenditures should equal receipts. Budgets cover a one-year period. How the year is defined should be determined in the PTA bylaws for the local unit.

Approving the Budget

After the budget has been drafted, the budget committee chair should present it to the PTA board/executive committee for consideration and then to the PTA membership for approval. ***This presentation is made during the organization's general meeting where a quorum is determined to be present.*** A majority vote of the members present and voting is required for adoption and should be recorded in your minutes.

The budget is presented item by item to allow for discussion and amendment of each section. Funds should not be spent until the budget is approved.

At each regular meeting of the board/executive committee throughout the year, the treasurer should present a statement showing how the amounts expended to date compare with corresponding revenue received as outlined in your approved budget.

The budget committee should also seek approval of the plan to provide for sufficient funds in the budget to enable the association to carry on its program during the summer and prior to the start of membership enrollment in the fall.

Amending the Budget

Since the budget is only an estimate of the planned expenditures for the year, it may be necessary, from time to time, to amend it. When there are additional expenses or a change in an allocated expenditure, the budget may be amended by a vote of the association at any regular meeting or at a special meeting called for that purpose.

To amend budget item(s) previously adopted, it is necessary to have a two-thirds vote, with previous notice, a majority vote.

Approval of Expenditures

The adoption of the budget authorizes the treasurer to pay for routine expenses covered in the budget only if such authority is given to the treasurer in the local PTA bylaws. If the local PTA bylaws do not provide this authority, the treasurer shall pay bills only when the board/executive committee or local PTA members vote to expend the money, and then only upon presentation of properly signed vouchers, as required in the state bylaws.

All expenditures must be reported to the board/executive committee and included in the treasurer's regular financial report to the membership. Any additional expenditure not provided for in the budget must be approved by the membership. The regular financial report should be attached to the minutes of the meeting at which it was presented. Changes in the budget, whether income or expenditures, must be presented as amendments to the budget.

Bonding Information

SOUTH CAROLINA PTA



Bonding (Commercial Crime)

A PTA should be run like a business. You have a budget to work within, deadlines to meet, and events to plan. The main concern in any business is finances. You may have many different officers with check signing capabilities or you may trust one of your volunteers to run to the bank to deposit fundraising money. Although there may be various safeguards set up to protect your funds, there is still a large risk of someone embezzling your money. The Bond (or Commercial Crime) policy is set up to protect your money, scrip, securities, and other cash equivalents against embezzlement, robbery, and theft.

Embezzlement, Robbery and Theft

With the Bond coverage, your funds are covered from embezzlement by anyone that you entrust with the PTA's money. Some of the people your organization might trust with your funds include:

1. PTA Officers
2. PTA Volunteers
3. Couriers

Position Bond vs. Blanket Bond

There are two types of bonds out there...Position Bonds and Blanket Bonds. Position Bonds usually cover only one person or one position with the PTA. While this option may seem less expensive than a Blanket Bond, these Bonds only protect your PTA if that one person embezzles the money. As a better example, if your PTA only bonds the Treasurer, you will find yourself in a difficult situation if the President embezzles the money. The policy that AIM offers is a Blanket Bond. Under a Blanket Bond, it is not necessary to name everyone covered by the bond nor the position that they hold within the PTA. In the event of a claim, we would ask if the person suspected of embezzlement was trusted with the money or if they stole the PTA's funds. Your funds are also covered from anyone that has check signing capabilities who fraudulently forges a second signature on outgoing checks.

Requirements and Conditions

To extend your Bond policy to your PTA, you must agree to the following requirements:

1. Your PTA must conduct an annual audit/review of the books by an audit/review committee or qualified accountant.
2. The monthly bank reconciliation must be reviewed and signed by someone who does not have authorization to sign checks. Financial software does not qualify under this requirement.

The Two Biggest Obstacle Concerning Embezzlement:

1. Understanding that trust can be broken under the right circumstances, and
2. Thinking it won't happen to your organization.

PTA Sample Deposit Form

PTA DEPOSIT FORM



Event: _____ Date: _____
 Chairperson: _____ Phone: _____
 Form submitted by (if different than Event Chairperson): _____

CHECKS # of checks _____ Total Checks \$ _____

Use reverse side of form to itemize all checks, and transfer your totals above.

CASH Total Cash \$ _____

Write the sum of the Total Bills and the Total Coins in the Total Cash line above.

Type of Bill	#	Amount
\$100.00		\$.
\$50.00		\$.
\$20.00		\$.
\$10.00		\$.
\$5.00		\$.
\$2.00		\$.
\$1.00		\$.
TOTAL		\$.

Type of Coin	#	Amount
Dollar		\$.
Half-dollar		\$.
Quarter		\$.
Dime		\$.
Nickel		\$.
Penny		\$.
TOTAL		\$.

TOTAL DEPOSIT TOTAL DEPOSIT \$ _____

Write the sum of the Total Checks and the Total Cash in the Total Deposit line above.

Counter's Signature: _____ Date: _____
 Counter's Signature: _____ Date: _____
 Received by Treasurer: _____ Date: _____

- PTA regulations require that there be at least two (2) people responsible for counting money at the conclusion of each event. One of these must be a PTA Board Member, but not necessarily the Chairperson of the event. Each counter and the event chairperson should retain a copy of this signed form for his/her records.
- If time permits, please write the last name of both the student and his/her homeroom teacher on checks as you receive them. This assists both the Treasurer and the event Chairperson when a follow-up is needed.
- At no time should PTA funds be taken home by a volunteer. Money should be counted immediately at the close of each event and stored at the school until it can be transferred into the Treasurer's custody.
- **The Treasurer cannot receive money that is not accompanied by this form, completed in its entirety.**

PTA Payment Reimbursement Voucher

PTA PAYMENT/REIMBURSEMENT VOUCHER



Payable to: _____ Date: _____
 Address: _____ Phone: _____
 Child's name: _____ Teacher: _____
 Voucher submitted by (if different than payee): _____

- Mail check to address above Leave check in my PTA folder Send check home with my child

PTA PURCHASES

Please list each retailer (Office Depot, Sam's Club, etc.), a general description of the items purchased (poster board, cookies, etc.), and the total amount being submitted for payment. List each receipt separately. If this is an invoice that your Treasurer should pay directly to the merchant, please note that in the Remarks section below.

Place of Purchase	Items	Amount
		\$
		\$
		\$
		\$
Total		\$

PTA CATEGORIES

Please list the PTA categories or budget line items accounts to be debited (Hospitality, Membership, Fundraising, etc.) The Committee Chairperson responsible for each budgeted account must authorize the expenditure below before the payment can be approved. The PURCHASE total above must equal the CATEGORIES total below.

Account to be Debited	Chairperson Signature	Amount
		\$
		\$
		\$
		\$
Total		\$

- Use Tax-Exempt Form when making purchases intended for resale.
- Attach all copies of receipts, purchase orders, invoices, or bills to the back of this form. Receipts are required for PTA Financial Review and tax-reporting purposes.
- Return completed forms to the PTA Treasurer.
- Please allow two weeks for voucher to be received, approved, and processed for payment.

Remarks: _____

Treasurer's Notes:
 Date rec'd: ___/___/___ Date paid: ___/___/___ Chk number: _____ Chk amount: \$ _____

PTA Donations Receipt Form

PTA DONATIONS RECEIPT



The PTA is a national non-profit organization dedicated to:

- Supporting and speaking on behalf of children and youth in the schools, in the community, and before governmental agencies and other organizations that make decisions affecting children;
- Assisting parents in developing the skills they need to raise and protect their children; and
- Encouraging parent and public involvement in the public schools of this nation

Community participation is vital to the success of our mission. We simply cannot achieve our goal of enriching the educational opportunities of our children by bringing our schools, families, and communities together without the support of both individuals and local businesses. We are a non-profit membership organization with 501(c)3 federal-exempt tax status, so your contributions are tax deductible. Our EIN is: _____ - _____

Vendor/Donor _____

Item(s) donated	Value
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Items received by _____ Date ____ / ____ / ____

Thank you so much for your involvement and commitment to our program!

_____, PTA President

_____, PTA/PTSA

_____, SC _____

Phone: (____) _____

SCPTA: Why We Need a Financial Review

SOUTH CAROLINA PTA



Why Do We Need an Audit/Financial Review? June 2012 newsletter-The MoneyMinder Team

We can't think of a volunteer group that would not benefit from conducting a financial review at the end of each financial year.

If your group is affiliated with a national organization, a financial review may well be a requirement of your affiliation. For examples PTAs are required to conduct a review at the end of each financial year or whenever there is a change in Treasurers. If you belong to such an organization, guidelines will be provided for you. Follow them!

But even if your group has no such legal requirement, an annual audit-or financial review- is simply a best practice and one that you may as well embrace.

Audit/Financial Review-What's the Difference?

A financial review and an audit serve the same purpose: someone who has not had signing authority on the account reviews the financial records of the organization to determine to the best of their ability whether the financial statements presented accurately reflect reality. The difference is that an audit is typically performed by a paid professional while a financial review is typically prepared by unpaid members of the organization. For our purposes we will use the terms interchangeably.

Note that if an internal financial review results in concerns about accuracy and /or procedures, than an external audit could well be in order.

To Audit or Not to Audit

Reasons not to do an audit:

- You did something that you don't want anyone else to know about.

Reasons to do an audit:

- Credibility-The Board and Membership will be reassured that the financial affairs of the organization are being accurately represented by the financial reports.
- Oversight-The Treasurer will have confirmation that his/her works was looked at and checked for accuracy.
- Improvement-The Audit Committee may identify procedures that could be improved to benefit the organization.

On a personal note, we would never ever take on board responsibilities for an organization until we were satisfied with the findings of their most current financial review.

Selecting Your Financial Review Committee

SOUTH CAROLINA PTA



Financial Review (AUDIT) Committee

Towards the end of the year it is imperative that a financial review committee be appointed to review and sign off on the books and operations for the year. (You might consider appointing the review committee at the same time the nominating committee is appointed.) This committee should NOT include any person who has check writing or signing authority.

Financial Review Committee Procedure

All of the following should be thoroughly checked:

- Reconcile each month's bank statement with:
 - canceled checks
 - check book
 - treasurer's reports
 - total expenditures of the unit or council
- Verify that every check written is substantiated with a receipt, invoice or bill.
- If a check was issued and no receipt, invoice or bill can be found, inform the unit on the Financial Review Checklist and verify the expenditure as an approved budget item.
- Reconcile each deposit slip with:
 - bank statement
 - check book
 - total income of unit or council
- Verify that a receipt was written (issued) to the appropriate person for all funds received by the treasurer.
- Verify that all income and expenditures were authorized by the membership and are allocated into the same categories that constitute the approved budget.
- Complete the [PTA Financial Review Checklist](#) and the [PTA Financial Review Report Form](#) and submit copies to the SCPTA office by October 1st.

SCPTA Financial Review Checklist instructions

This [form](#) must be used in conjunction with the Financial Review Report Form when conducting your unit's annual audit. This form will help your committee determine how well your PTA unit established and followed standard PTA protocol when managing its finances.

- All seventeen (17) of the YES/NO questions must be answered by the Financial Review Committee.
- Any questions answered with a NO must be further explained on the back of the form or on a separate piece of paper. Please be as detailed as possible.
- If the committee is unsure of an item on the checklist, a call may be made to the responsible party (Treasurer, President, Secretary, etc.) for clarification. However, please keep in mind that those individuals may not participate in the audit if they had check-signing privileges during the period under audit.

SCPTA Financial Review Report Form Instructions

This [form](#) must be used in conjunction with the Financial Review Checklist when conducting your unit's annual audit. This form is used to report the overall earnings and expenditures of the unit as well as the findings of the committee with regards to the management of the unit's finances.

- The beginning balance should match the closing balance of the audit that was performed at the close of the previous fiscal year.
- The current balance on hand should equal the total balances of all checking/savings accounts.
- All accounts and cash assets should be included in the audit.
- The audit committee chair will present the report at the next meeting of the general membership where it will be recorded into the meeting minutes.

If you have more questions and need answers please contact David DuBose, SCPTA Treasurer, at treasurer@scpta.org

Financial Review Checklist

PTA FINANCIAL REVIEW CHECKLIST



PTA/PTSA Name _____ PTA District # _____ PTA Council _____
 Address _____ Date ____ / ____ / ____

Please complete this form in its entirety.

General Questions	Number	YES	NO
Does the PTA unit/council have its IRS employer identification number (EIN)?			
Does the PTA unit/council have South Carolina Sales Tax Exemption?			
Does the PTA unit/council have liability and bonding insurance?			
Income		YES	NO
Was all the income properly allocated and categorized in accordance with the budget?			
Did each deposit slip match the bank statement, the checkbook and the total income of the unit?			
Expenditures		YES	NO
Were all expenditures properly allocated and categorized in accordance with the budget?			
Is there a proper bill or voucher for each expenditure?			
Was each expenditure a part of the budget?			
Internal Revenue Service		YES	NO
Did the unit/council receive more than \$25,000 in gross income?			
If YES, did the unit/council file a completed Form 990 with the IRS?			
Checks/Banking		YES	NO
Were all checks properly signed by authorized unit officers?			
Were all checks sequentially numbered?			
Were all checks/disbursements accounted for?			
Were all bank statements properly reconciled on a monthly basis by the treasurer?			
Budgets/Reports		YES	NO
Is there an approved motion in the minutes for the budget?			
Did the treasurer submit regular written financial reports?			
Were the financial records maintained in an orderly manner?			

Explain all "NO" responses on the reverse side of this form.

Reviewed by: 1) _____
Please print name Signature
 2) _____
Please print name Signature
 3) _____
Please print name Signature

Please submit along with the Financial Review Committee Report Form (committee's recommendations), a copy of the final bank statement and reconciliation, and the final treasurer's report by October 1st.

1828 Henderson Street
 Columbia, SC 29201

Website: www.scpa.org
 Email: office@scpta.org

Office: (800)743-3PTA
 Fax: (803)765-0399

Financial Review Report Form

PTA FINANCIAL REVIEW REPORT FORM



PTA/PTSA Name _____ PTA District # _____ PTA Council _____
 Address _____ Date ____ / ____ / ____

Please complete this form in its entirety.

Beginning Balance on Hand <small>(final balance as of the date of the last audit)</small>	\$ _____ .
Total Receipts <small>(all income/deposits from date of last audit to date of current audit)</small>	+ \$ _____ .
Total Cash Received this Fiscal Year	= \$ _____ .
Total Disbursements <small>(all payments/withdrawals from date of last audit to date of current audit)</small>	- \$ _____ .
CURRENT BALANCE ON HAND <small>(beginning balance plus all revenue less all expenditures)</small>	= \$ _____ .

Last Bank Statement Balance	\$ _____ .
Total Checks Outstanding <small>(list check numbers and amounts on back if necessary)</small>	- \$ _____ .
Total Deposits Made Since Statement <small>(list dates and amounts on back if necessary)</small>	+ \$ _____ .
Today's Balance in Checking/Savings Accounts	= \$ _____ .

Date(s) and Time(s) Financial Review Performed:

Date ____ / ____ / ____ Time ____ AM/PM to ____ AM/PM
 Date ____ / ____ / ____ Time ____ AM/PM to ____ AM/PM
 Date ____ / ____ / ____ Time ____ AM/PM to ____ AM/PM

We have examined the books of the Treasurer of _____ PTA/PTSA and have found them to be:

- Correct Incomplete Incorrect Substantially correct (with the following adjustments)

Reviewed by: 1) _____ signature _____
Please print name
 2) _____ signature _____
Please print name
 3) _____ signature _____
Please print name

This report should be presented to the local unit board by a member of the Financial Review Committee. The presiding officer should then call for the appropriate action.

1826 Henderson Street
 Columbia, SC 29201

Website: www.scpta.org
 Email: office@scpta.org

Office: (800)743-3PTA
 Fax: (803)765-0399

SCPTA Local Unit Checklist for October 1st

OCTOBER 1ST LOCAL UNIT CHECKLIST



Local Units must submit the following items to the SCPTA by October 1st.

These items are required for units to remain in good standing with the SCPTA. We are required by law to report all non-compliant units to the IRS annually. Please attach all required items to this checklist and submit to the SCPTA office at the address below.

Checks should be made payable to SCPTA.

Contact your District President or the SCPTA office for assistance.

REQUIRED ITEMS

- Local Unit Membership Report form
- Dues payment (\$3.25 per member)
- Electronic Membership roster submitted to welch@scpta.org
- Financial Review Report form
- Financial Review Checklist
- PTA budget approved by local unit membership with approved minutes

OPTIONAL ITEMS

- *SCPTA Historic House Preservation Fund donation
- *Helen Stokes Memorial Scholarship Fund donation
- *Gerry Pfaehler Endowment Fund donation
- *Founder's Day donation
- **Our Children* magazine subscription for school

* Starred items are for SCPTA Goals items.

1826 Henderson Street
Columbia, SC 29201

Website: www.scpta.org
Email: office@scpta.org

Office: (800)743-3PTA
Fax: (803)765-0399

District 1 PTA DUES FORM 2015-16



**District 1 Greenville County Schools PTA
DUES FORM
2015-2016
Report and dues must be submitted
By December 1, 2015
Checks payable to: District 1 PTA**

Name of PTA Unit _____
Submitted by: _____ Title _____
Phone _____ email _____

Based on current number of paid PTA members as reported for FYE 2013-14 please pay the appropriate dues as indicated below:

- Tier A < 100 members = \$10
- Tier B 101 - 200 members = \$20
- Tier C 201 - 500 members = \$60
- Tier D 501 + members = \$100

Members reported for FYE 2014-15 _____
Dues Amount (based on Tier level above) \$ _____

Please note –

To remain in good standing with PTA, units must submit the following with this dues report by December 1st (note these can be submitted electronically by emailing District 1 treasurer these documents to **D1PTAtreasurer@gmail.com**):

- Copy of completed, signed financial review form and checklist with attached requested documents for review
- Copy of approved budget
- Copy of completed Tax filing for previous year (either postcard e-file or copy of 990)
- Copy of Insurance Certificate for this year

Please ensure timely reporting of members. These dues are needed by Dist. 1 to pay for yearly Superintendent breakfasts for four council areas and bi annual training sessions. In addition, summer school scholarship donations to the school district for deserving students in District 1.

Thank you for your support and volunteer efforts with PTA!

Remit to: District 1 PTA
Mary Green (Treasurer)
PO Box 25397-0397
Greenville, SC 29616 Questions: 299-3979 or **D1PTAtreasurer@gmail.com**

Notes for Treasurers

(From SCPTA Information)

The South Carolina PTA recommends the following policies:

- If funds are collected for two projects on the same day (i.e., membership and fund raiser), then it is strongly suggested that the funds for each project be listed on separate deposit slips.

- Volunteers handling funds for the local unit (i.e., president, treasurer, ways and means chair, etc.) should be bonded. Those requiring bonding coverage may vary by the local unit. Additional information on bonding insurance may be received from the South Carolina PTA Treasurer or South Carolina PTA Office. Bonding insurance provides quality protection, so please include this in your budget.
- The bylaws provide that the treasurer submits a financial statement regularly to the organization. This financial statement should be referred to the financial review committee who should report to the organization at such time as the bylaws require.
- Local unit bylaws should state the amount of the dues for membership in the organization. This amount includes both the local unit portion and the state and national portions of membership dues. The local unit treasurer must forward the state and national portions of the dues to the South Carolina PTA office, using the form provided by the membership chair. These dues (\$2.25 National and \$1.00 South Carolina PTA for a total of \$3.25 per member) must be sent to the South Carolina PTA Office monthly. **A Monthly Local Unit Membership and Dues Report form needs to be submitted for the months of September through February to be eligible for awards.**
- The treasurer is also responsible for submitting a copy of the **approved local unit budget** to the SCPTA office by **October 1**. Be sure your unit's name and EIN is on the copy.
- Pay all bills as authorized by the membership. A **PTA Reimbursement/Payment Voucher** should accompany all check requests and should be kept on file with the cancelled check or bank statement.
- Cooperate with the membership chair and the secretary in keeping accurate records of the PTA membership.
- PTAs are prohibited from taking in money from a school event or from another school organization if the money is not to be used for PTA budgetary needs.
- Never just write a check to the school for unspecified expenses.
- Never give out a blank check... do not sign a blank check.
- Money should never be taken home... it should go directly from the school to the bank.
- Two people (one a board member) must be present when collecting and/or counting money and should both sign and date the **PTA Deposit Form**.
- You can amend your budget as needed to accommodate changing financial needs. Refer to the **NPTA Money Matters** (link) in your Back to School Kit or website for a copy of a sample budget.
- Budget amendments must be approved at a general meeting or at a special meeting of the association called for that purpose.
- An annual report is to be presented by the treasurer to the organization after the treasurer's books have been reviewed. Refer to the NPTA Money in your B-S-K or website for a copy of a sample budget.
- Deliver to your successor all books, papers and correspondence pertaining to the office of treasurer, including all reviewed books, approved and paid bills, canceled checks, plans and procedures.
- **PTAs whose annual gross receipts are \$50,000 or less for tax years ending on or after December 31, 2010, are required to submit Form 990-N, also known as the e-Postcard, electronically unless they choose to file a complete Form 990 or 990-EZ. If the PTA's annual gross receipts are normally more than \$50,000 but less than \$200,000, and total assets are less than \$500,000, the PTA has an obligation to complete and file Form 990-EZ. See PTA Money Matters (http://www.pta.org/local_leader/1443.htm) for instructions on completing the IRS Form 990, 990-N and 990-EZ.**
- **Each local unit, council, or district shall send a copy of its completed Form 990 to the SCPTA office.**

If you have more questions and need answers please contact David Dubose, SCPTA Treasurer, at awards@scpta.org

SCPTA Forms

There are several forms that Treasurers will find very helpful on the SCPTA Website. You can find them by going to www.scpta.org then click on Leaders and on the drop down menu click on forms. The forms are available in Word and PDF format.

Below is a list of suggested forms to use:

- PTA Deposit Form
- PTA Payment/Reimbursement Form
- PTA Donations Receipt Form
- Financial Review Checklist
- Financial Review Report Form
- October 1st Checklist
- Local Unit Membership Report Form (Due Monthly)

Special Information for the Treasurer

Your EIN (Employer Identification Number)

- Each local unit is required to have an EIN on file with the SCPTA Office. These numbers are issued by the U.S. I.R.S. If you don't know your unit's EIN, call the SCPTA Office. If your unit does not have an EIN, complete IRS Form SS4 (available from the SC PTA office or the IRS) to obtain one. This can be done electronically now through IRS.gov. In order for SCPTA to retain its tax exempt status, it is necessary that every local unit have an EIN.
- The EIN assigned to your unit is not a tax number. It is merely a tax identification number, like a social security number is for an individual.
- EIN number should be recorded in the checkbook for future reference.

The SCPTA operates under a Federal Income Tax Exemption number that covers all subsidiary units (local units in good standing). This does not relieve your unit from the obligation to complete IRS Form 990 which is one of the requirements to maintain a "good standing" status with SCPTA.

**NO award shall be presented to any local unit, district, or council
that does not have an EIN on file with SCPTA**

Sales Tax Exemption

Local units in good standing are sales tax exempt on items purchased for RESALE ONLY under the SCPTA Sales Tax Exemption Number. Your local unit should have a copy of this tax exemption certificate on file. Do not loan this number to anyone! It cannot be used by any organization other than your PTA. Some fundraising companies are now requiring a letter from SCPTA office confirming that a local unit is eligible to use the tax-exempt number. If you are asked for such a letter, call the SCPTA office, and they can furnish one for your unit.

The PTA Budget

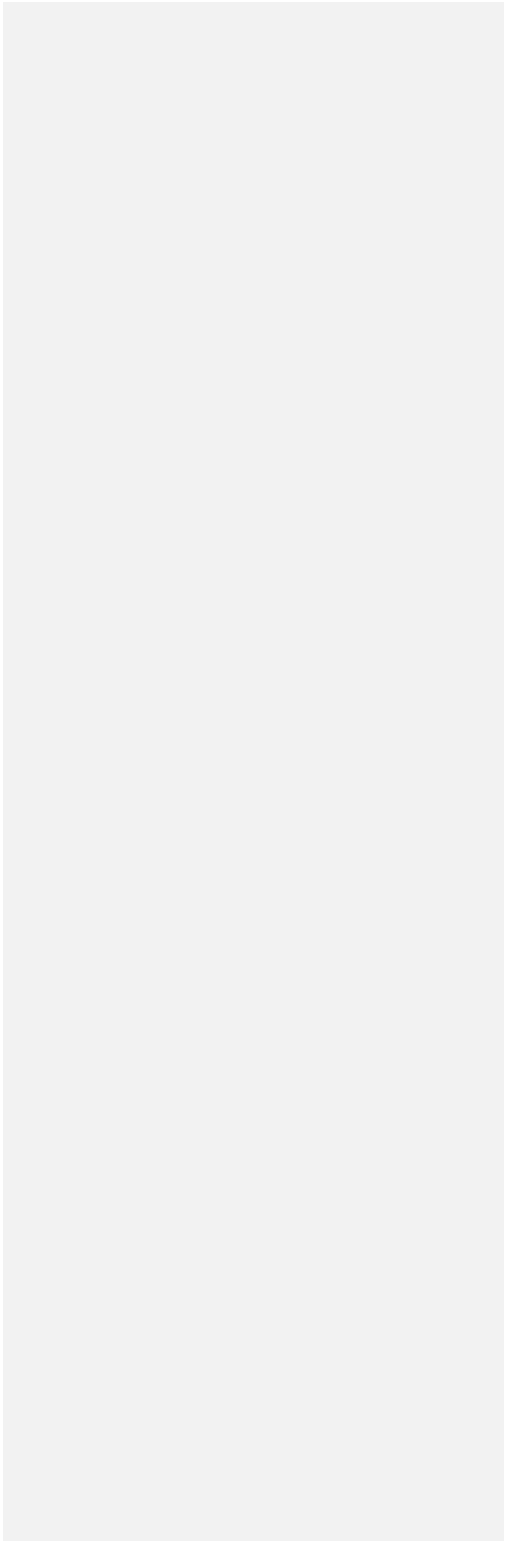
Expenses listed below for Leadership Training, Convention, etc. **may** also be included in the local unit budget:

<i>ITEM (Per Person)</i>	<i>APPROXIMATE COST</i>
Leadership Training	\$30.00 (registration)
SCPTA Legislative Events	\$25.00 (registration)
SCPTA Convention	\$25.00 (registration)
National Convention	\$250.00 (registration)
Life Memberships	\$50.00 with pin
SCPTA Historic House Preservation Fund Contribution	\$10.00
SCPTA Endowment Fund Contribution	\$10.00
SCPTA Helen Stokes Memorial Scholarship Fund Contribution	\$10.00
Founder's Day Contribution	\$10.00

State and National Dues are NOT Listed in the PTA Budget

These funds are simply transfer items and must be listed as such. Only the portion of dues retained by the local unit is shown as income in your local unit budget. The local unit is the agent for collecting the state and national dues, and must show these amounts on the treasurer's statement only. Most local unit PTAs hold fundraisers during the school year to finance special projects. It is important to remember that fundraising is not the primary function of your PTA. Before approving proposals for material aid to the school or community, it is well advised for the executive committee to consider whether or not the proposed equipment or service is a public responsibility and should be paid for from public funds. Additional questions regarding financial issues should be directed to the District 1 Treasurer, Mary Green, d1treasurer@gmail.com or David DuBose, SCPTA Treasurer at awards@scpta.org

Health & Wellness



Health and Wellness:

Greenville County Schools and District 1 PTA have made a commitment to healthy school environments. For this purpose, District 1 PTA has a Chairperson, Catherine Puckett, on its board of directors to serve as a liaison with community organizations that are providing wellness information to schools. The goal of this position is to provide resources to local units as they initiate and continue wellness efforts.

Over the past few years, Greenville County has seen schools adopt new breakfast and lunch menus, host successful health-conscious fundraisers as well as sponsor Health and Wellness nights that included: exercise and fitness classes, options for getting active outside of school, and nutrition ideas for healthy snacks and meals at home.

LiveWell Greenville has consistently partnered with Greenville County Schools, offering technical assistance and resources to help our local units with all wellness efforts. Included on the following pages are suggestions for elementary, middle and high schools. More information can be found at www.livewellgreenville.org.

Catherine Puckett, Chair of District 1 Health and Wellness Committee, cpuckett@livewellgreenville.org



Elementary School PTSAs

LiveWell Greenville is excited to partner with your school! Thanks to the Communities Transformation Grant and other funding sources, we are able to offer resources and share successful examples as your team creates a healthier school environment. We recognize that each school culture is unique and faces different hurdles in making these important changes. Creating healthy and positive change requires a holistic approach. Your school environment has many facets that should be addressed in order to assure consistency and effectiveness. How can we help you?

LiveWell Healthy Schools Award

Tell us about the work you have done to make the healthy choice, the easy choice at your school! If you have met the LiveWell Greenville criteria, your school will receive **\$250** to support wellness activities, a plaque and a banner to display in your school building, as well as recognition at a year-end celebration. In addition, the elementary, middle, high, and private or charter schools that have made the greatest strides in school health will each receive **\$1,000** to support school wellness! Applications will be available online in January and will be due April 1. We would love to help your school win this award!

Applications will be available online in January on our website: www.LiveWellGreenville.org

Wellness Team/ CATCH Committee

Having an active and enthusiastic wellness team can be a key factor to making sustainable changes at your school. This team should be comprised of a variety of people from around your school who have a passion for wellness. The committee should focus on assessing the school's successes and opportunities, and then set goals that go with these opportunities. These goals should be accomplished through the efforts of the school as a whole. Remember to regularly recognize the goals and reassess them as needed by the team.

View the Schools' Toolkit at LiveWellGreenville.org for more information

Staff Wellness

Having a healthy staff creates a culture of wellness at your school. Staff will be more likely to motivate and teach students about leading healthy lifestyles as they become role models for their students. It also decreases employee absences, leading to more consistency for the students.

Classroom Movement

Physical activity in the classrooms increases students' overall wellness, decreases behavior issues and stimulates brain function. The more they burn, the better they learn!

View the Schools' Toolkit at LiveWellGreenville.org for more information

Elementary School PTSAs -2



Healthy Fundraisers for Elementary Schools

Fundraisers can be fun and healthy! Finding and starting NEW fundraisers can be a challenge, but with a little time and research we can help make a difference in this key part of your school year.

Healthy Fundraisers

- Walk-a-thon or Bike-a-thon
- Student artwork turned into mugs, t-shirts, magnets, etc.
- Silent Auctions of gift baskets of donated items
- Classroom competitions where change is collected as votes
- Compile and sell a school cookbook

View the Schools' Toolkit at LiveWellGreenville.org for more information

Healthy Celebrations and Snacks

From birthdays to holidays, there are many occasions to celebrate in the classroom! Food is almost always part of a celebration and, unfortunately, the most popular celebratory treats can contribute to unhealthy eating habits as well as behavior issues in the classroom. A few easy changes can help parents, teachers and school administration shift the focus of school parties from unhealthy food to healthy fun!

Active and Non-Food Celebration Ideas:

- Have parents donate one of the child's favorite books to the classroom. Write his or her name and birthday on the inside cover, and read the book to the class.
- Picnic lunch outside
- Crafts
- Create a "birthday book"—each student can write something nice or draw a picture for the birthday boy/girl
- Play a classroom game
- Have a dance party
- Create a "birthday book"—each student can write something nice or draw a picture for the birthday boy/girl
- Water Party with spray bottles
- Class talent show

View the Schools' Toolkit at LiveWellGreenville.org for more information

Healthy Snack Ideas:

- Fruit popsicles or fruit kabobs
- Ants on a log—celery with cream cheese or yogurt and raisins
- Apple slices caramel dip
- Whole grain tortilla chips with salsa
- Cinnamon apple chips
- Whole grain crackers and reduced fat cheese
- Frozen strawberries in Greek yogurt
- Fruit and yogurt dip
- Hummus and Veggies
- Trail mix (nuts alert)

View the Schools' Toolkit at LiveWellGreenville.org for more information

Elementary School PTSAs -3



Healthy Rewards for Elementary Schools

There are lots of opportunities for rewards at school: classrooms meet a group goal such as maintaining good behavior or collecting the most Box Tops, individual students improve grades or sell the most PTA memberships, or acknowledging a 'job well done' for teachers. Healthy rewards contribute to the overall wellness culture of your school.

Healthy Rewards for Individuals:

- Celebrate success with a coupon to the School Store
- Homework pass!
- Entrance to the End of Grading Period Dance Party
- Student chooses the next rainy day recess activity
- Student gets to use 'Cherished Chair' for day (a painted or decorated chair that easily fits at their desk)
- Student does the morning announcements
- Bring in a Massage Team for relaxing teacher breaks
- Bring in flowers from the yard for teacher

View the Schools' Toolkit at LiveWellGreenville.org for more information

Healthy Rewards for Classrooms:

- 10 minutes of extra recess
- Bag lunch picnic on playground
- Dance party – learn the hula or Sid's Shuffle from Continental Drift movie
- Bring in board games
- Wear pajamas or silly socks for a day
- Students vote on movie to watch
- Cardboard trophy to displayed on classroom door for the 9 weeks
- Class receives 'free choice' activity at end of the day
- Students bring in ingredients to make fruit smoothies

View the Schools' Toolkit at LiveWellGreenville.org for more information

As LiveWell Greenville School Specialists, we will be your partners throughout the year as you make the healthy choice, the easy choice in your school. We look forward to working with you!

Your LiveWell Schools Specialists

Catherine Puckett
CPuckett@LiveWellGreenville.org

Sarah Shockley
SShockley@LiveWellGreenville.org
(864)230-7627



Healthy Fundraisers for Middle and High Schools

Supplementing your school's budget with different fund raising methods is critical. There are many ways to create a healthy environment while generating the necessary funds. Fundraisers can be fun and healthy! Finding and starting NEW fundraisers can be a challenge, but with a little time and research we can help make a difference in this key part of your school year.

Healthy Fundraisers

- Walk-a-thon or Bike-a-thon
- T-shirts designed with student help
- Silent Auctions of gift baskets of donated items
- Classroom competitions where change is collected as votes
- Compile and sell a school cookbook
- Student pays \$1 to wear crazy socks or hat to school for a day

View the Schools' Toolkit at LiveWellGreenville.org for more information

Concession and Vending

Promotion and pricing of your healthy concession and vending options are keys to a successful healthy transition. The healthy choices should be at least as easy and enticing to purchase. For kids to make healthy choices there must BE healthy choices. Research conducted by LiveWell Greenville in 2012 demonstrated that the presence of healthier items on a concessions menu can have positive effects on health AND profit.

- Price healthier options similarly to current Selections.
- Display healthier options in a pleasing manner
- Offer items such as wraps, fresh fruit, grilled chicken bites, smoothies and water
- Snack items should include trail mix, nuts, carrots, etc.

View the Schools' Toolkit at LiveWellGreenville.org for more info

School Store

School stores have had success by adding a variety of healthier options, such as:

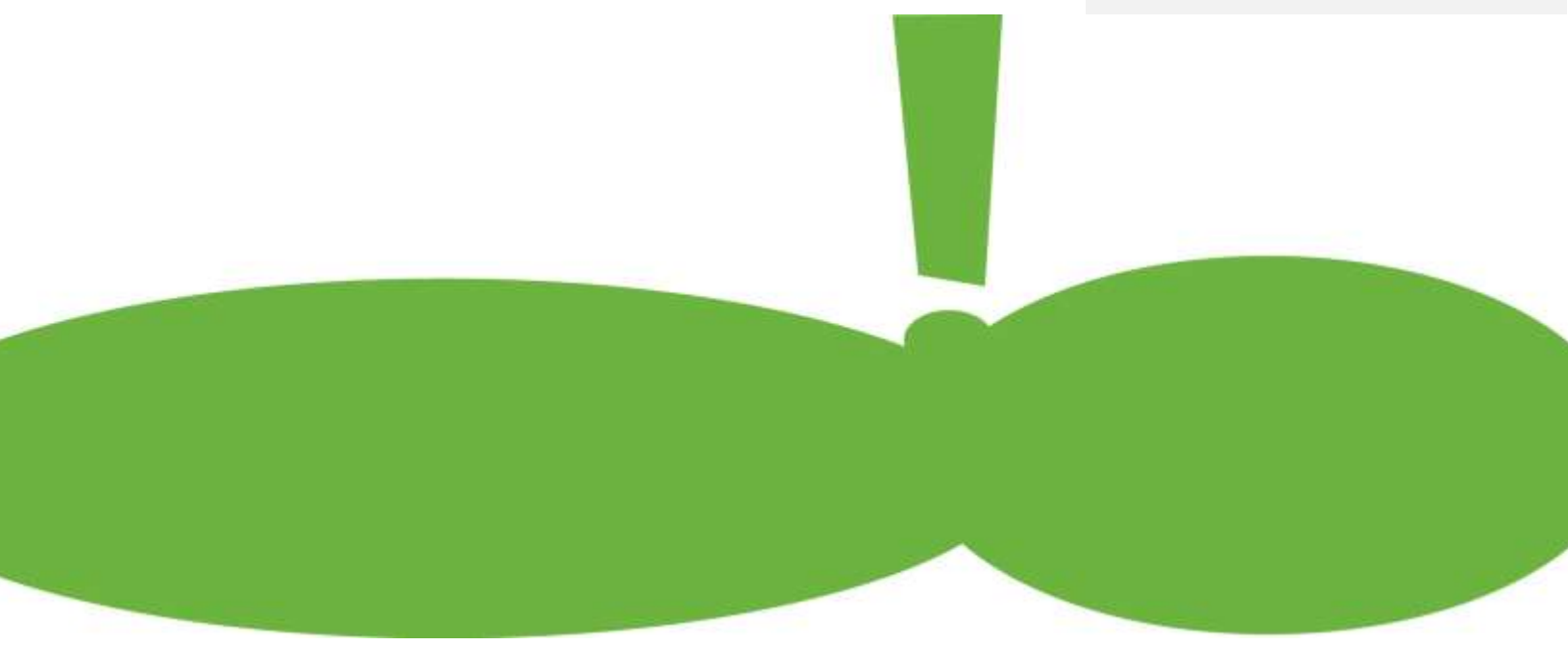
- Fresh fruits (bananas, apples, oranges)
- Soft Pretzels
- Water and flavored water
- Yogurt or parfaits
- Trail Mix
- Almonds
- Protein and granola bars

View the Schools' Toolkit at LiveWellGreenville.org for more information

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Middle & High School PTSAs – 2



Healthy Rewards for Middle and High Schools

There are lots of opportunities for rewards at school: classrooms meet a group goal such as maintaining good behavior or collecting the most Box Tops, individual students improve grades or sell the most PTA memberships, or acknowledging a 'job well done' for teachers. Healthy rewards contribute to the overall wellness culture of your school.

Healthy Rewards for Individuals:

- Celebrate success with a coupon to the School Store
- Homework pass!
- Entrance to the End of Grading Period Dance Party
- Student chooses the next rainy day recess activity
- Student gets to use 'Cherished Chair' for day (a painted or decorated chair that easily fits at their desk)
- Student does the morning announcements
- Bring in a Massage Team for relaxing teacher breaks
- Bring in flowers from the yard for teacher

View the Schools' Toolkit at LiveWellGreenville.org for more information

Healthy Rewards for Classrooms:

- 10 minutes of extra recess
- Bag lunch picnic on playground
- Dance party – learn the hula or Sid's Shuffle from Continental Drift movie
- Bring in board games
- Wear crazy hats or silly socks for a day
- Students vote on movie to watch
- Cardboard trophy to displayed on classroom door for the 9 weeks
- Class receives 'free choice' activity at end of the day
- Students bring in ingredients to make fruit smoothies

View the Schools' Toolkit at LiveWellGreenville.org for more information

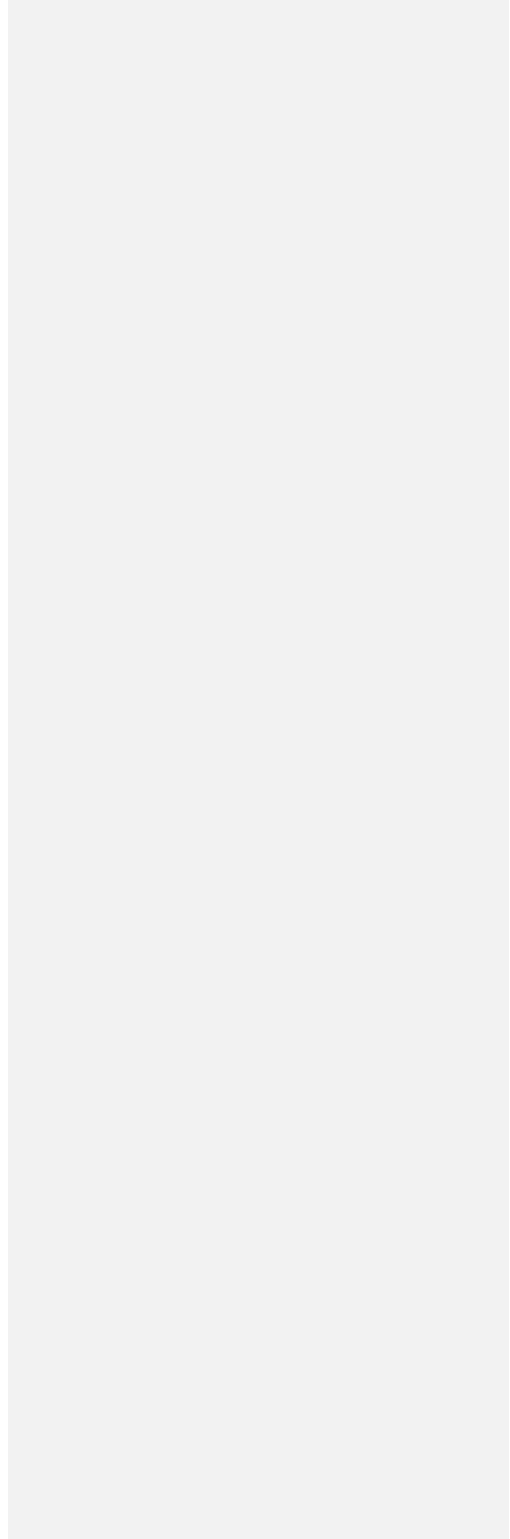
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Membership



Membership Benefits – always changing please check www.pta.org for new partners

Save Money with Member Benefits Providers



Whether you're buying school supplies for the kids, or renting a car for your next family vacation, PTA members can save money on everyday purchases thanks to National PTA's [Member Benefits Provider Program](#).

National PTA is able to partner with businesses and negotiate special discounts, fundraising opportunities and other valuable benefits exclusively for PTA members.

Sample Membership Application Form

PTA MEMBERSHIP FORM



Help support your child's education by joining the _____ PTA!

Memberships are \$ _____ per person. Please make checks payable to _____.

Date ____/____/____

1st Member _____ Email _____
Address _____ City _____, SC Zip _____
Phone (____) _____ home work cell
 parent student faculty/staff other relationship to student _____

2nd Member _____ Email _____
Address _____ City _____, SC Zip _____
Phone (____) _____ home work cell
 parent student faculty/staff other relationship to student _____

3rd Member _____ Email _____
Address _____ City _____, SC Zip _____
Phone (____) _____ home work cell
 parent student faculty/staff other relationship to student _____

4th Member _____ Email _____
Address _____ City _____, SC Zip _____
Phone (____) _____ home work cell
 parent student faculty/staff other relationship to student _____

If student is not listed above as a new member of the PTA, please list name and grade below:

Student Name _____ Grade _____ Teacher _____

Student Name _____ Grade _____ Teacher _____

_____ memberships @ \$ _____ each = \$ _____ check # _____ cash

What programs or services would you like to see your PTA offer this year? All suggestions are welcome!

THANK YOU!! Please return form to: _____

For PTA Use:

Date rec'd: ____/____/____ Cards issued: ____/____/____ Payment amount \$ _____

SCPTA 2015-16 Monthly Local Unit Membership Report

Commented [RL1]:

2015-2016 MONTHLY LOCAL UNIT MEMBERSHIP & DUES



Date ____/____/____

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

Address _____ City _____, SC Zip _____

10 th Day Student Enrollment		Members Enrolled this Report	
Number of Teachers		Teachers Enrolled this Report	+
PTA ID #		TOTAL Enrolled this Report	=
Unit Federal EIN		(State dues = \$1.00, National Dues = \$2.25)	x \$3.25
Bylaws Expiration	/ /	TOTAL MEMBERSHIP DUES this Report	=
School County		Helen Stokes Memorial Scholarship Fund Donation	+
SCPTA District #		TOTAL ENCLOSED	=

For assistance in locating this information, please contact your District President or the SCPTA office.

Monthly Report Date: The SCPTA membership year is July 1 to June 30. Please submit the Local Unit Membership Report to the state office each month. Remember to check your math and have 2 signers on the check. If no dues collected, a report is still submitted with a "0" in the box. Mark the box below for the month reported.

July January	August February	Sept. March	October April	Nov. May	Dec. June
-------------------------	----------------------------	------------------------	--------------------------	---------------------	----------------------

Monthly Reporting Method: To remain in good standing as a 501(c)3 non-profit organization, each local unit must comply with the IRS regulation that requires a roster of all PTA members be compiled annually. Local units may submit a roster of PTA members in any format or by using the Excel spreadsheet found on www.scpta.org. Email completed roster to lwelch@scpta.org.

Awards Requirements: To be eligible for receiving Membership Awards, the 10th day student enrollment total and number of teachers need to be completed on the Monthly Membership Report Form. The 10th day student enrollment number is available from the school Secretary or Principal after the 10th day of school.

<p>Local Unit President _____</p> <p>Home Address _____ City _____, SC Zip ____ Phone Number (_____)</p> <p>email: _____</p> <p><input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell <input type="checkbox"/> Home <input type="checkbox"/> Work</p>
<p>Local Unit Treasurer _____</p> <p>Home Address _____ City _____, SC Zip ____ Phone Number (_____)</p> <p>email: _____</p> <p><input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell <input type="checkbox"/> Home <input type="checkbox"/> Work</p>

Request Form for Additional Membership Cards

ADDITIONAL MEMBERSHIP CARDS REQUEST FORM



Purpose:

Use this form to request additional membership cards.

Instructions:

- Make copies of this form as needed.
- Fill in the information requested below. Please print.
- To receive additional membership cards, your local unit PTA/PTSA must submit dues for **at least 75%** of the number of cards received to date.
- Please allow one (1) week to process mail requests and two (2) days to process pick up requests.
- Cards will be mailed to contact person listed below.
- When submitting dues, make checks payable to South Carolina PTA and mail with membership report to 1826 Henderson Street, Columbia, SC 29201.
(A \$35.00 service fee will be applied for checks returned for non-sufficient funds).

Local Unit PTA/PTSA Name:	Local Unit ID #:
District:	Council (if applicable):
Contact Person:	PTA/PTSA Position:
Address:	
City:	Zip Code:
Daytime Phone:	Email:

Number of Cards Received to Date: _____

Number of Cards Issued for Paid Memberships: _____

Total dues submitted to South Carolina PTA as of today: _____

Number of Additional Cards Requested: _____

Signature of President or Membership Chairperson: _____

FOR STATE OFFICE USE ONLY

Date Request Received: _____

Date Request Processed and Mailed: _____

Number of Cards Mailed: _____

Suggested Letter to Faculty

(Your school's name) PTA



**We need 100% PTA
Membership from our
Faculty and Staff!!**

The PTA has big plans for 2015-2016!
We need everyone to join PTA.

Just fill out the form below and attach the correct amount.

I have enclosed \$5.00 for my membership card.

Name: _____

Full mailing address: _____

(State law requires that we have an address for every person that purchases a membership card. You may use the school address.)

Please place your completed form and money in the PTA mailbox in the front office.

THANK YOU

Sample Letter to Parents (English)

(Your school's name) PTA



**We need 100% PTA
Membership from our
Parents/Guardians!!**

The PTA has big plans for 2015-2016!
We need everyone to join PTA.

Just fill out the form below and attach the correct amount.

I have enclosed \$5.00 for my membership card.

Name: _____ Child's Name: _____ Class: _____ Full mailing address: _____

Phone #: _____ Email: _____

(State law requires that we have an address for every person that purchases a membership card.)

Please return your completed form and dues with your child.

THANK YOU

Sample Letter to Parents (Spanish)

(Your School Name) PTA



**Necesitamos 100% membresía
en el PTA de nuestros
padres/apoderados!!**

El PTA tiene grandes planes para el 2015-2016!

Necesitamos que todos se unan al PTA.

Llene la información en el espacio indicado y adjunte la cantidad correcta de dinero.

He incluido \$5.00 para mi tarjeta de membresía. Nombre: _____
Nombre de su hijo(a): _____ Clase: _____ Dirección de su casa: _____
de teléfono: _____ Correo electrónico: _____

(La ley estatal requiere que tengamos una dirección de cada persona que compra una tarjeta de membresía.)

Por favor envíe este formulario completo y su cuota de membresía con su hijo(a).

GRACIAS

Volunteers

Volunteers

Sample PTA Volunteer Interest Sheet – Elementary Level

Volunteer Opportunities for Parents at Your School Name

Your School Name prides itself on having a very active PTA. In fact, one of its success stories is the number of volunteer hours racked up annually by our parents. As a new parent that is anxious about sending your kindergartener off to school for a full day, rest assured there will be several ways you can volunteer at school. Some involve coming into the school while others offer parents with younger siblings an opportunity to help your child's teacher without coming to the classroom. Here is a brief overview of the volunteer opportunities available to kindergarten parents:

CLASS ROOM:

Room Coordinator – help the teacher coordinate volunteer assignments such as Lunch bunch, SEEDS, Computer Lab, and other activities designated by the teacher as important to enhancing the learning process.

Lunch Bunch - provides coverage for the teacher during the class's designated lunch period so that the teacher can eat with colleagues and check mailbox, etc. Lasts 25 minutes.

Computer lab – usually one time per week each class goes to the school's computer lab for enrichment exercises. Parent assistance greatly improves the efficiency of this process. Training is provided at the beginning of school year.

Cutting Specialist – Assist the teacher by cutting items for class assignments and projects. Assigned as needed by the teacher.

Reader Books – once per week, students are given a book to read at home with their parents that is geared to their skill level. Parent volunteers come in weekly to assist in reading the prior week's book with the child and to select another book for them.

Classroom parties – during the school year, there are parties held in the classroom and at different times there are needs for treats. The room coordinator requests volunteers for each.

SCHOOL WIDE: Many of these events center on our PTA's fundraising activities. Each year, Your School Name's PTA raises funds for classroom enhancements. Over the years, the funds raised have built the computer lab, the playgrounds, and supply the media center, and classroom technology enhancements. All things to be proud of and that make Your School Name a state-of-the-art school. Here are some of the events that occur during the year that required significant volunteer assistance.

Book Fairs (two per year fall and spring)

School Festival – Festival held the first Friday of November (several opportunities to volunteer); baked goods, volunteer activities at booths, supplies, prizes, etc.

Related arts classes – art teachers, library, and physical education – field day assistants, other as needed

Breakfasts with Dad – Fall events (3)

Bingo Nights – Spring events (3)

OTHER: While volunteer time is a key component to Your School Name's PTA, here are some other ways that you can financially contribute should volunteering of time not be a way that you can contribute:

PTA Membership – Your School Name achieves 100% each year. This means that each student enrolled at the school has at least one parent as a member of PTA. Information is sent home at the beginning of each school year. Since some parents choose not to join, several parents graciously purchase more than one membership which leads to our 100% membership.

Friends of Your School Name – This is a way to make a monetary contribution to the PTA to provide funds for our annual goal for school enhancement. It's also a way for businesses to contribute. Our PTA goal this year is Classroom Technology Enhancement.

Sample School Volunteer Form

XYZ Parent-Teacher Organization (PTO) coordinates volunteer efforts for school activities and raises funds to support school programs that further enrich the experience of all students. Parent volunteers help with all types of school programs, class events, class parties, field trips, and learning activities.

Volunteer 1

Volunteer 2

Name: _____

Phone: Hm: _____ Hm: _____

Wk: _____ (list if okay to call) Wk: _____ (list if okay to call)

Other: _____ Other: _____

E-mail: _____

(I check my email hourly, daily, weekly)

(I check my email hourly, daily, weekly)

Name1

Name 2

I would be willing to help with the following areas (customize as needed):

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Offer to be a Class Parent (Organize volunteers as needed from your child's class, call parents) <i>Note, teacher will coordinate if multiple parents volunteer.</i> |
| <input type="checkbox"/> | <input type="checkbox"/> | Help in the Classroom/Tutor (e.g., play reading games with a small group of children) |
| <input type="checkbox"/> | <input type="checkbox"/> | Computer Room Assistance (Help class during computer time) |
| <input type="checkbox"/> | <input type="checkbox"/> | Prepare Materials for Your Child's Teachers (Photocopying, cutting, laminating, etc.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Bring Baked Goods or Food for Teacher Appreciation activities and for class events |
| <input type="checkbox"/> | <input type="checkbox"/> | Help with Other Special Events throughout the year |
| <input type="checkbox"/> | <input type="checkbox"/> | Fall Book fair (1-2 hours shifts, weeklong event held usually November) |
| <input type="checkbox"/> | <input type="checkbox"/> | Fall Track & Field (Usually October) |
| <input type="checkbox"/> | <input type="checkbox"/> | Breakfast with Santa (Mid-December on a Saturday morning) |
| <input type="checkbox"/> | <input type="checkbox"/> | Spring Track & Field (Usually April or May) |
| <input type="checkbox"/> | <input type="checkbox"/> | Spring Family Event (Carnival or Spring Fling) – Usually April or May |
| <input type="checkbox"/> | <input type="checkbox"/> | Spring Book fair (1-2 hours shifts, weeklong event held usually April or May) |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend Field Trips |
| <input type="checkbox"/> | <input type="checkbox"/> | Be a guest speaker and share information on your culture, travels, talent, skills, crafts, or professional experience. Topics: _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Help with building or ground maintenance |
| <input type="checkbox"/> | <input type="checkbox"/> | Assist children in lunchroom (open milk, food containers, ketchup packets) |
| <input type="checkbox"/> | <input type="checkbox"/> | Other _____ |

You will receive additional information and requests for specific assistance via details sent home with students, phone calls, and the PTA newsletter. Please feel free to contact any PTA member if you would like to volunteer during the year.

STUDENT INFO (Please list **each** child you have at **School Name**)

Name (First & Last)

Grade

Teacher

_____	_____	_____
_____	_____	_____
_____	_____	_____

Additional Resources

Additional Resources to Explore

SCPTA Items available on the District 1 Website www.greenvillepta.com

- ✓ Board Member List
- ✓ Local Unit Goals Sheet
- ✓ Local Unit Officers Report
- ✓ Local Unit Membership Report
- ✓ Membership Chair Information Sheet
- ✓ Membership Benefits Staples FAQ Sheet
- ✓ SCSOS Guidelines on charitable organizations (See SCPTA.org for additional guidelines)
- ✓ SCPTA Auditor's information on IRS 990 and 990EZ filings (see SCPTA.org link on our website)
- ✓ SCPTA Guidelines for local units on blogging, Facebook and Twitter, and YouTube
- ✓ Fundraising guidelines
- ✓ AIM Insurance sheet
- ✓ Greenville County Schools Guidelines on Volunteers (will posted on the www.greenvillepta.com website)

Other Useful Links for PTAs to access and use:

- ✓ www.greenville.k12.sc.us for Greenville County information (calendar, policies, school information)
- ✓ LiveWell Greenville www.livewellgreenville.org
- ✓ www.scpa.org (South Carolina PTA)
- ✓ www.pta.org national PTA website
- ✓ Local Unit PTA Toolkit is now available on the www.pta.org website go to Local Leader resources
 - Membership
 - Money Matters for Treasurers
 - Reflections information (although most is in this handbook 😊)

Program Ideas:

- ✓ Anti-bullying
- ✓ Internet Safety
- ✓ Health and Wellness nights
- ✓ Science and Technology Nights
- ✓ Candidate forums during election years

Have a great year!