



District 1 PTA Handbook

2018-19 Academic School Year

Greenville County Schools

Greenville, South Carolina

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SCPTA District 1 PTA Board of Directors

2018-2019

Table of Contents

<u>TOPICS</u>	<u>PAGE</u>
PTA Mission Values, Purposes and Policies	2
District 1 Board of Directors	3
Greenville County Schools Board of Trustees	4
Greenville County Legislative Delegation, Advocacy	5
Dues and Membership Report Form	6
General Policies and Terms	6-10
Treasurer Information	11-12
Financial Reporting	12-13
Budget Information	13-15
Finance Forms	15
District 1 Dues Form	16
Membership	17
Suggested Letters to Faculty, Parents, and Spanish Version	18-20
Volunteers	21
Health and Wellness	22
Additional Resources	23

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 [National PTA Website](#) and you can also see them at [South Carolina PTA Website](#)

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	Susan Key	District1President@gmail.com	
VP of Programs	Michelle LaStringer	michellelastringer@aol.com	
VP of Membership	Grace Rankin	District1membership@gmail.com	
Secretary	Colleen Barnes	colleenmbarnes@gmail.com	
Treasurer	Debbie Nelson	Dnelson332@aol.com	
Immediate Past President	Pam Driggers	pdriggers@charter.net	
Principal Representatives:			
NE PTA	Justin Ludley Greer High School 3000 East Gap Creek Dr. Greer, SC 29651	jludley@greenville.k12.sc.us	355-5700
NW PTA	Heather Hester Heritage Elementary School 1592 Geer Highway Travelers Rest, SC 29690	hhester@greenville.k12.sc.us	355-6000
SE PTA	Nerissa Lewis Bethel Elementary School 111 Bethel School Road Simpsonville, SC 29681	nqlewis@greenville.k12.sc.us	355-4100
SW PTA	Jennifer Meisten Beck Academy 901 Woodruff Road Greenville, SC 29607	jmeisten@greenville.k12.sc.us	355-1400
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:			
Public Education Partners			
Reflections	Joy Anderson	theonlyjoyanderson@yahoo.com	
Health & Wellness	Ericka McCleskey	emccleskey@livewellgreenville.org	
Spanish Liaison	Miriam Torres	miriamtorres85@hotmail.com	
Member at Large	Kim Whelehan	kwhelehan@charter.net	
Executive Director, SCPTA 1836 Henderson Street Columbia, SC 29201	Vicki Patterson	office@scpta.org	803-765-0806

Policymakers That Affect Education in South Carolina

Greenville County School District Board of Trustees

School Board meetings are the fourth Tuesday of each month at 7 PM and the Committee of the Whole (COW) meets on every second Tuesday at 9 AM at the Central Office. These meetings are open to the public. School representatives may wish to attend and take information back to local unit board meetings. Go to [Greenville County Schools Website](#) to see a map to help you determine your district.

DEBI C. BUSH Area 19 – Term expires 2020 47 Green Valley Road Greenville, SC 29617 dbush19@aol.com	Owner Expressions	271-9972 (office)
MICHELLE GOODWIN-CALWILE Area 25 – Term expires 2020 100 Bluff Drive Greenville, SC 29605 mgoodwincalwiled25@gmail.com	Retired Educator	275-6511 (cell)
JOY GRAYSON Area 17 – Term expires 2020 1906 Dunlin Court Taylors, SC 29687 joy@joy4education.com	Attorney	421-4650 (cell)
LYNDA LEVENTIS-WELLS (Vice-Chairman) Area 22 – Term expires 2018 1107 Edwards Road Greenville, SC 29615 llwells22@gmail.com	Retired Educator/Law Enforcement	268-0579 (home)
DEREK LEWIS Area 24 – Term expires 2018 111 W. Prentiss Ave. Greenville, SC 29605 derek@lewis4schools.com	Executive Director Greenville County First Steps	423-5316 (cell)
ROGER D. MEEK Area 26 – Term expires 2018 6 South Valley Lane Greenville, SC 29611 rdmeek@bellsouth.net	Owner Bramlett Insurance	233-8587 (office)
GLENDA MORRISON-FAIR (Secretary) Area 23 – Term expires 2020 16 Allendale Lane Greenville, SC 29607 gsmf7782@gmail.com	Retired K-12 Educator	232-1320 (home)
CRYSTAL BALL O'CONNOR Area 27 – Term expires 2020 305 Holly Tree Lane Simpsonville, SC 29681 crystalball.oconnor@gmail.com	Author Children's Books Writing Educator – SC Arts Commission	979-8554 (home)
DANNA ROHLEDER Area 21-Term expires 2020 322 S. Wingfield Drive Greer, SC 29650 danna.rohleder@gmail.com	Retired K-12 Educator	616-4389 (cell)
CHARLES J. (CHUCK) SAYLORS (Chairman) Area 20 – Term expires 2018 19 Elmwood Drive Taylors, SC 29687 chucksaylors@gmail.com	Vice-President MB Kahn Construction Company	354-3577 (cell)
PATRICK L. SUDDUTH Area 18 – Term expires 2018 2525 Country Club Road Greer, SC 29651 sudduthp@bellsouth.net	Retired K-12 Educator	877-0685 (home)
LISA H. WELLS Area 28 – Term expires 2018 3 Keynan Court Simpsonville, SC 29680 lisahwells@yahoo.com	Civil Engineer City of Greenville	313-1580 (cell)

Greenville County Legislative Delegation

The Greenville County Legislative Delegation serves in Columbia, SC from January through May. They vote on the state budget which includes the funding for South Carolina schools. To stay informed about bills and laws affecting our children, you may email office@scpta.org. To find your legislator by zip code, please visit www.scstatehouse.gov. You can also use this website to call or email your Senator or Representative to voice your opinion on issues.

Advocacy Guidelines for PTAs

“Guidelines for PTA and Legislative Issues”

Do’s:

- ✓ PTAs can lobby in support of or in opposition to federal, state or local legislation.
- ✓ PTAs can conduct educational activities and prepare and distribute educational materials on legislation (articles in newsletters, flyers, etc.).
- ✓ PTAs can conduct public forums in an effort to educate its members regarding the details of a specific issue or piece of legislation (ex. PTA meetings or special workshops).
- ✓ PTAs can conduct public candidate forums but must see that all candidates are invited. This event cannot show any support or opposition to a specific candidate.

Don’ts:

- ✓ PTAs cannot participate in political campaigns (written or verbal) in favor of or in opposition to an individual candidate for public office.
- ✓ PTAs cannot participate in political fundraising activities.
- ✓ PTAs cannot distribute materials for or against a legislative issue through the students, or from carpool lines (but may at PTA meetings, regardless of where held).
- ✓ Here is the scanable QR code to be used by your local PTA units:



- ✓ Here is the video link: [SCPTA Youtube Advocacy Training Video](#)

SCPTA Dates to Remember

- State Membership Reports should be filled out online at [South Carolina PTA Website](#) by **October 1, December 1 and March 1.**
- SCPTA Bulletin articles submission **due 1st day of each month**

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 legit 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.

Recordkeeping for Present and Past Local Unit Information

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 the District 1 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 an online membership report to the state office on or before October 1, December 1, and March 1 (there will be special incentives to submit additional reports/dues on September 1 and February 1 - these are optional). Send both the national and state portion (\$3.25 total per membership sold) to SCPTA through Wepay through MemberHub.

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). Local units submit dues separately to District 1 and the state (for national + state portion).

The tiered scale is:

< 100 members or new unit: \$10

101-200 members: \$20

201-500 members: \$60

501+ members: \$100

This tiered dues structure provides funding for the annual Superintendent's breakfasts, training sessions, the Reflections arts program, and other support of Greenville County local PTA units and students.

Submit District 1 dues **NO LATER THAN October 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 will receive an email invoice for District 1 dues. Any questions may be directed to the treasurer, Debbie Nelson, at dnelson332@aol.com. Send invoice with payment to: District 1 PTA Treasurer, Debbie Nelson, PO Box 25397 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.***

Insurance

Please make certain that your unit is covered by the appropriate insurance policy each school term. AIM Insurance is the carrier we use. Please contact District 1 Treasurer if you have any questions regarding this important issue.

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, websites, 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 the state office 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 the District 1 PTA president and the 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 but we realize this is not always realistic. We would rather you use your money to have a functioning, productive unit helping the students and families in your school than your board buying memberships to reach 100%. Membership percentages are calculated by 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 your 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.

Remember that Membership Reports are due OCTOBER 1, DECEMBER 1 AND MARCH 1 to the state office— even if 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 for privacy reasons, but please, not for all members.

Schools failing to report 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 payment no later than the October report (due October 1).

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. Erica McCleskey, Schools Specialist, LiveWell Greenville, 864-238-5304, emccleskey@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. Everyone must register at the school and be cleared on the National Sex Offender Registry 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 2018-19 is “Heroes Around Me”. 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: December 11, 2018 – Turn-in date for District 1 entries.

SCPTA Scholarships

SCPTA awards scholarships to high school graduates. 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 Coca 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 [National State Boards of Education Website](#) 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 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 or do not 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.*)

Mail

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

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 boards begin their term in office.
Oct 1st	Membership Reports and Dues are Due	Submit membership report online to SCPTA at South Carolina PTA Website , send membership dues payment via Wepay, upload membership to MemberHub 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	Submit membership report online to SCPTA at South Carolina PTA Website , send membership dues payment via Wepay, upload membership to MemberHub D1 Treasurer, PO Box 25397-0397, Greenville, SC 29616 A copy to D1 Treasurer and the SCPTA Office: Attn: Vicki Patterson, Exec. Director 1826 Henderson Street Columbia, SC 29201
Nov 15th	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.
Dec 1st	Membership Reports and Dues are Due	Submit membership report online to SCPTA at South Carolina PTA Website , send membership dues payment via Wepay, upload membership to MemberHub Points on Goals Sheet, mandatory for Goals Award
March 1st	Membership Reports and Dues are Due	Submit membership report online to SCPTA at South Carolina PTA Website , send membership dues payment via Wepay, upload membership to MemberHub Points on Goals Sheet, mandatory for Goals Award
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 SC PTA Convention	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	Submit online at www.scpta.org
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

Notes for Treasurers

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 by October 1, December 1 and February 1.
- The treasurer is also responsible for submitting a copy of the **approved local unit budget** to the SCPTA office and the District 1 Treasurer 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
- 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.**
- **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 Shawn Rearden, SCPTA Treasurer, at treasurer@scpta.org.

Financial Reporting

The Treasurer must present a financial report at each board and general meeting. All bank statements must be reviewed by a non-checking signing member each month. Financial reports must be part of the minutes for each board and general meeting. Treasurers must address current income and expense activity each month.

Any changes to the budget must be approved by the general membership and an amended budget must be voted on by the general membership.

Please do not issue any checks to CASH and all checks must be signed by two parties. You can issue a check out to a merchant under one signature and the second signature can be added at the time of purchase. You should have your checking account set up so that the bank will not honor any check unless two signatures are on it. Please make certain that your bank account is set up so that images of checks are returned with each statement. This will allow for verification of two signatures on each check. Also, the insurance company requires this process.

Financial Reviews

Please begin to select your review committee to have your books from this fiscal year reviewed so that they can be handed over to the incoming board for the upcoming year. The Financial Review is due to the District Treasurer October 1, 2017. These can be scanned and emailed to D1ptatreasurer@gmail.com

Taxes

Please ensure your taxes for your unit have been filed by November 15, 2017.

SCPTA Forms

There are several forms that Treasurers will find very helpful on the SCPTA Website. You can find them by going to [SCPTA Forms Webpage](#) or [SCPTA Money Matters Webpage](#). The forms are available in 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)

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.

Budget Information

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.

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, Virginia Crews, d1treasurer@gmail.com or SCPTA Treasurer, Shawn Rearden, at treasurer@scpta.org.

[SCPTA Forms Webpage – PTA Deposit Form](#)

[SCPTA Forms Webpage – PTA Payment/Reimbursement Voucher Form](#)

[SCPTA Forms Webpage – PTA Donations Receipt Form](#)

[SCPTA Financial Review Information – SCPTA Money Matters Webpage](#)

[SCPTA Financial Review Checklist – SCPTA Forms Webpage](#)

[SCPTA Financial Review Report form – SCPTA Forms Webpage](#)

[SCPTA Local Unit Checklist \(For October 1\) – SCPTA Forms Webpage](#)

District 1 PTA DUES FORM 2018-19

Greenville County Dist.



everychild.onevoice.®

District 1 Greenville County Schools PTA
DUES FORM

2018-2019

Report and dues must be submitted
By October 1, 2018

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 School Year 2017-18 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 School Year 2017-18 _____

Dues Amount (based on Tier level above) \$ _____

Please note –

To remain in good standing with PTA, units must submit the following with the dues report by December 1st (note these can be submitted electronically by emailing District 1 treasurer these documents to **dnelson332@aol.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 District 1 to pay for yearly Superintendent breakfasts for four council areas and bi annual training sessions.

Thank you for your support and volunteer efforts with PTA!

Remit to: District 1 PTA
Debbie Nelson (Treasurer)
PO Box 25397-0397
Greenville SC 29616

Questions: **dnelson332@aol.com**

Membership

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

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 Offers](#).

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

[PTA Membership Form – SCPTA Forms Webpage](#)

[Monthly Local Unit Membership Report Form – SCPTA Forms Webpage](#)

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 2018-2019!

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. 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 2018-2019!
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.)

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 2018-2019!

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

School Visitor and Volunteer Guidelines

Greenville County Schools (GCS), in an effort to ensure the safety of all of our students, is implementing additional security checks for school volunteers. Effective immediately, all volunteers must submit an application to the school and receive clearance from the district before interacting with children in the school or chaperoning any school field trip.

Volunteers are now identified by two different categories: Level I or Level II.

Visit the [Greenville County Schools Volunteer Guidelines page](#) for registration requirements and guidelines.

Our primary responsibility is to safeguard our children and ensure we are in compliance with the identified guidelines. Thank you for your cooperation as we work with our stakeholders to complete this process. All volunteers will be required to remain in the presence of a GCS employee at all times until applications for Level II are approved.

Schools shall provide annual training to volunteers covering pertinent information including, but not limited to, the Safe School Climate Act and volunteer expectations at the school.

Please feel free to contact your child's school if you have questions

[SCPTA Volunteer Sign-up Form – SCPTA Forms Webpage](#)

[SCPTA Volunteer Request Form – SCPTA Forms Webpage](#)

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. Erica McCleskey, Chair of District 1 Health and Wellness Committee, emccleskey@livewellgreenville.org.

[Livewell Greenville Website](http://www.livewellgreenville.org)

Additional Resources

SCPTA Items available on the [SCPTA Website](#):

- ✓ 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

Other Useful Links for PTAs to access and use:

- ✓ [Greenville County Schools Website](#) for Greenville County information (calendar, policies, school information)
- ✓ [LiveWell Greenville Website](#)
- ✓ [South Carolina PTA Website](#)
- ✓ [National PTA Website](#)
- ✓ Local PTA Leader Kit is now available on the [National PTA Website](#)
 - Membership
 - Money Matters for Treasurers
 - Reflections Information

Program Ideas:

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

Have a great year!