

October 1 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. SCPTA is 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.

Contact your District President or the SCPTA office for assistance.

Required Items

- Local Unit Officer Report Form
- Local Unit Membership Report form with Dues check.
Electronic excel spreadsheet emailed to office@scpta.org
- Previous Year-Financial Review Report form
- Previous Year-Financial Review Checklist
- Current Year PTA budget approved by local unit membership w/minutes

Optional Items

- SCPTA Historic House Preservation Fund donation
- Helen Stokes Memorial Scholarship Fund donation
- Gerry Pfaehler Endowment Fund donation
- Founder's Day donation