

Email send August 25, 2016

## Revving up for a great year! PTA Membership tips

### A few tips for a successful first membership dues report.

For those of you gunning for the 100% faculty membership by September 1st recognition, I wanted to walk you through the reporting process (form attached).

1. Your report and check need to be POSTMARKED no later than Friday, September 1 to be included in this challenge. Remember, Monday, September 5 is Labor Day so don't look for receipt acknowledgements before Wednesday, September 7.
2. How to figure out your "magic number" of "Total School Faculty" - add your total number of teachers + principals. Teachers are defined as those employees who issue grades to students.
3. Total Students - this is your school's enrollment as of the 10th day of classes. Ask your front office staff for this number. You will use this number for EVERY DUES REPORT this school year, even if your school's enrollment should change. Depending on what day your school district went back, that date will be as follows:

Monday 8/15 - Friday, 8/26

Tuesday, 8/16 - Monday 8/29

Wednesday, 8/17 - Tuesday, 8/30

Thursday, 8/18 - Wed., 8/31

3. For the September 100% Faculty Challenge, the "Total New School Employee Members" should equal or be greater than the "Total School Faculty". Additional staff employees like aides, counselors, nurses, clerks, resource officers should be recruited as well and ARE included in the "New School Employee Members" total.
4. For this September 1 report, include an Excel contact list of your teacher/staff members (school email addresses are perfect).
5. You may include parent members as well on this report, but that is optional and can wait until the October 1 report.
6. Remember to include a check payable to SCPTA. There should be TWO signatures on the check (best practice for **any** check written by your unit)
7. The total dollar amount of the check should be evenly divisible by \$3.25 Double-check your math! Number of reported members x \$3.25 = total amount of check
8. Please include the Membership & Dues report **WITH** your check. Email the Excel list of members to [office@scpta.org](mailto:office@scpta.org); make sure to include the name of your school on the document and in the Subject line of the email.
9. Celebrate a job well done! Gear up for the October 1 report.

### Make the most of the first PTA impression

Most of you will be hosting parent events in the next few days/weeks: Orientation for Kindergarten & 1st grade parents, Open Houses, volunteer orientation sessions, first Board meetings and General Membership meetings. Be welcoming. Create agendas, advertise what will be offered and deliver. Your first impression will be lasting so create a positive event. Parents should leave feeling smarter, relieved, appreciated, included. And yes, have a PTA membership table set up to take dues! :) Speaking of first impressions, if your PTA launched a fundraiser *before* having an event to meet parents, you may have already made an impression - that you want their money and their time. You may have to work harder to prove the positive benefits of joining PTA.

Also please let your families know what your Board has been doing this summer to prepare for a great year. Did your PTA provide breakfast for the teachers' first day? Gift cards to every teacher for supplies? Plant fresh flowers or clean the grounds? BLOW YOUR OWN HORN & let parents know! Members want to know what an association does and how they can fit in before they join.

### Keeping deadlines on your radar

October 1 may still be far away but keep in mind that Uncle Sam requires SCPTA to have on file certain documents that need to be voted on by your General Membership. For instance, your budget for 2016-17

Email send August 25, 2016

needs to be voted on & approved at your first meeting of the year. Kudos to those units that approved a preliminary budget before school let out last spring! That budget allowed your unit to operate this summer. Your current pool of parents needs to also give their approval to the budget (perhaps some adjustments needed to be made since July 1).

Reminder of all documents due on or before October 1:

- Membership Dues report with check and Excel list of members
- Current year PTA budget approved by local unit membership with copy of minutes from meeting where vote was held.
- Complete Local Unit Officer Report (LUOR) - have there been any changes since the summer?
- Financial Review of 2015-16 records
- Financial Review Checklist for 2015-16 records

(Psst. BTW, with the completed Financial Review, you have all the info needed to complete the IRS tax form 990. Go ahead and complete the form before the Nov. 15 IRS deadline! Make sure to copy SCPTA.)

Finally, is your unit struggling to recruit volunteers? You are not alone! Please check the [scpta.org](http://scpta.org) website and/or Facebook page @South Carolina PTA for tips on how to find and keep new helpers.

THANK YOU!

---

--

Carol Beard  
VP of Membership and Field Services  
SCPTA  
1826 Henderson Street  
Columbia, SC 29201  
[864-640-0789](tel:864-640-0789) (cell)  
[803-765-0399](tel:803-765-0399) (fax)