

Example 1

2016-2017 LOCAL UNIT MEMBERSHIP & DUES REPORT



LOCAL UNIT INFORMATION			
PTA/PTSA Name	Awesome Elementary	Report Date	9-1-16
Mailing Address	123 Grand Ave.	PTA Unit ID#	12345678
City, State, Zip	Heaven, SC 29000	SCPTA District #	30
Federal EIN#	00-000000	Bylaws Expiration Date	3-1-19
LOCAL UNIT LEADERSHIP INFORMATION			
President	Great Leader	Email	Awesomeleadere@gmail.com
Membership Chair	Gladja Here	Email	joinus@awesomepta.org
Treasurer	Ka Ching	Email	moneybags@aol.com
MEMBERSHIP REPORT DETAILS			
Total School Faculty	a. 35	Total New School Employee Members	c. 37
Total Students	b. 500	Total New Student/Parent Members	d. 100
* Check here to certify that a Membership Roster has been submitted electronically to office@scpta.org that includes all new members in this reporting period.		Total New Members this Report @ \$3.25ea	e. 137
		Total Due this Report	f. 445.25

INSTRUCTIONS TO COMPLETE FORM AND CALCULATE DUES

membership year begins on July 1st and ends on June 30th. Local units are required to use this form to report membership dues on the following dates: October 1, December 1, and March 1.

Be payable to SCPTA in the amount provided in box f. above must accompany this form at the time of submission.

All checks should have two signatures. To calculate the total for this box, add the total number of teachers plus the total number of administrators and principals. For this case, "teachers" are only defined as those who issue grades to students. Similarly, "administrators" are only defined as principals, assistant principals, and administrative assistants. This number does not include other faculty such as librarians, counselors, aides, nurses, etc. For help with this calculation, contact your local principal. This number indicates the number of teachers/students at your school as of the 10th day of school. Contact your local Data Clerk for this information.

To calculate the total for this box, add the total number of teachers, administrators AND all other school employees (including counselors, aides, etc.) who have joined your PTA during this reporting period (since the last reporting period).

- **Box d.** - To calculate the total for this box, add the total number of other members, including parents, grandparents, community members, etc., who have joined your PTA during this reporting period (since the last report).
- **Box e.** - To calculate the total for this box, add the total in box c. to the total in box d.
- **Box f.** - To calculate the total for this box, take the total in box e. and multiply it by \$3.25. This should be the amount of your check. Of this total, \$1.00 stays with SCPTA and \$2.25 is paid to National PTA. Therefore, all members of your local unit also hold membership in SCPTA as well as National PTA.
- Membership chairs should maintain copies of this form for Local Unit records.
- **Membership Roster Reporting** - 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. The most effective reporting can be done using the Membership Roster template found on www.scpta.org. All Membership Rosters should be emailed to office@scpta.org.
- For questions regarding this form or other membership issues, contact SCPTA Vice President of Membership, Carol Beard at vpmembership@scpta.org. For other questions, contact Executive Director, Lorene Welch at lwelch@scpta.org.

Here is an example of a correctly filled-out membership & dues report.

PTA Unit ID# is a unique 8-digit number issued by National PTA. Check with your treasurer, district or state office if you are unsure.

There are 2 principals and 33 teachers who enter grades for students so the "magic number" of Total School Faculty = 35. All 35 joined PTA plus the school bookkeeper and the nurse joined so 37 total new school employee members are reported. 105% faculty membership!

The student enrollment on the 10th day of school was 500.

As of this report, a total of 100 parents had joined the PTA.

Total members reported: $37 + 100 = 137$

Total remittance: $137 \times \$3.25 = 445.25$

There will be 137 names of members with contact information on the Excel spreadsheet submitted to SCPTA

These numbers will stay the same all year

Example 2

Example from a high school

PTA Unit ID#: 8 digit number assigned by National PTA. Check with treasurer, District or state PTA

There are 4 principals and 86 teachers who issue grades. "Magic number" for Total School Faculty = 90

84 teachers and all the principals joined. A guidance counselor & the resource officer also joined, $84 + 4 + 2 = 90$
Total New School Employee Members
100% Faculty goal reached!

Student enrollment on 10th day of school 1500.

50 students and 250 parents joined for A total of 300 New student/parent Members

Total members this report $90 + 300 = 390$
Total remittance $390 \times \$3.25 = 1267.50$

2016-2017 LOCAL UNIT MEMBERSHIP & DUES REPORT



LOCAL UNIT INFORMATION			
PTA/PTSA Name	Fantastic High School PTA	Report Date	9-1-16
Mailing Address	567 Glory Rd.	PTA Unit ID#	87654321
City, State, Zip	Knock Out, SC 20000	SCPTA District #	30
Federal EIN#	00-0000001	Bylaws Expiration Date	3-1-19

LOCAL UNIT LEADERSHIP INFORMATION			
President	Great Chief	Email	headdog@FHS.com
Membership Chair	Joy N. Us	Email	membershipFHS@gmail.com
Treasurer	Betty Bucks	Email	showme#@hotmail.com

MEMBERSHIP REPORT DETAILS			
Total School Faculty	a. 90	Total New School Employee Members	c. 90
Total Students	b. 1500	Total New Student/Parent Members	d. 300
<input checked="" type="checkbox"/> Check here to certify that a Membership Roster has been submitted electronically to office@scpta.org that includes all new members in this reporting period.		Total New Members this Report @ \$3.25ea	e. 390
		Total Due this Report	f. 1267.50

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- Box b.** - This total represents the number of students enrolled in your school as of the 10th day of school. Contact your school's Data Clerk for this information.
- Box c.** - To calculate the total for this box, add the total number of teachers, administrators AND all other school employees (including counselors, aides, etc.) who have joined your PTA during this reporting period (since the last report).
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How Reports later in the year would look:

Total School Faculty number & Total Students **stay the same all year.**

3 new school employees (librarian & after-school workers joined since the Sept report. Only note the **new** members since the last report.

After the first PTA meeting and successful Open House, the Membership Chair completed compiling the spreadsheet of all the paid members. 360 folks, who are not school employees, have joined since the last report!

Total members reported for Oct:
 $3 + 360 = 363$

Added to the previous report's total Membership of 137, this unit now has 100% membership!
 $137 + 363 = 500$

The Excel spreadsheet emailed to SCPTA Will include 363 new names with contact information

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Federal EIN#	00-0000000	Bylaws Expiration Date	3-1-19
LOCAL UNIT LEADERSHIP INFORMATION			
President	Great Leader	Email	Awesomeleader@gmail.com
Membership Chair	Gladja Here	Email	janus@awesompta.org
Treasurer	Ka Ching	Email	moneybags@aol.com
MEMBERSHIP REPORT DETAILS			
Total School Faculty	a. 35	Total New School Employee Members	c. 3
Total Students	b. 500	Total New Student/Parent Members	d. 360
<input type="checkbox"/> Check here to certify that a Membership Roster has been submitted electronically to office@scpta.org that includes all new members in this reporting period.		Total New Members this Report @ \$3.25ea	e. 363
		Total Due this Report	f. 1179.75
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