

## A PTA MONTH TO MONTH QUICK REFERENCE CHECKLIST

### JULY & AUGUST

	<ul style="list-style-type: none"> <li>▪ Meet with your Board of Directors. Plan a longer meeting / retreat to allow time for planning for the new school year.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Review WSPTA Bylaws to refresh and be familiar with Bylaw requirements.</li> </ul>	<input type="checkbox"/> g
	<ul style="list-style-type: none"> <li>▪ Finalize mission and goals for the new school year.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Review 2015-16 budget approved by membership, prepare any suggested changes (must be approved by membership again at next membership meeting).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Set PTA meeting dates for the upcoming year (board and membership meetings). Post both in a public place (i.e. school calendar, website, etc.)</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Review PTA Standing Rules and prepare and proposed changes for approval by membership.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Have board members review and sign code of conduct and/or conflict of interest forms</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Ensure annual Financial Review has been completed</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Begin promoting membership enrollment – create membership campaign</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Meet with Principal to review calendar and plan for curriculum night and other back to school events. Establish regular meeting schedule.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Attend Bellevue PTSA Council's PTA Presidents &amp; Principals Luncheon.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Attend Region 2 Fall Conference (all elected and appointed board members)</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Attend other trainings offered by Bellevue PTSA Council and Region 2</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Update your PTA's Legal Notebook</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Look at Standards of Excellence check list to see if you are on track with best practices.</li> </ul>	<input type="checkbox"/>

### SEPTEMBER

	<ul style="list-style-type: none"> <li>▪ Plan to attend Bellevue PTSA Council membership meeting (meetings are held each month).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Provide 4 voting delegate names to Bellevue PTSA Council (form can be found on Council website)</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Sign up for PTA and the Law. At least one elected officer must attend (open to all PTA board members).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Set up a table at curriculum night. Use this opportunity to build and demonstrate the partnership between the school and the PTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Hold your first membership meeting of the year. At this meeting review and approve your budget, Standing Rules and report of the Financial Review committee.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Find members for an awards committee (helps to track items through the school year).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Promote membership enrollment               <ul style="list-style-type: none"> <li>▪ Invite current members to rejoin your PTA.</li> <li>▪ Send home letters of invitation for parents to join.</li> </ul> </li> </ul>	<input type="checkbox"/>

	<ul style="list-style-type: none"> <li>Invite members of the community to join your PTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Promote Reflections Program.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Set up an information table at all registrations or open house dates (i.e. Kindergarten orientation).</li> </ul>	<input type="checkbox"/>
<b>OCTOBER</b>		
	<ul style="list-style-type: none"> <li>Be certain to complete your Standards of Affiliation Agreement with WSPTA (new in 2015-16 school year). Completed form due to WSPTA by October 31<sup>st</sup>.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Be certain that at least 1 elected officer has attended or signed up for PTA &amp; the Law.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make sure that membership invoices are being paid to the WSPTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make sure all new families and teachers in your school have been invited to join PTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Register to attend WSPTA Legislative Assembly. Details will be on the WSPTA website. Encourage your board and membership to attend.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Consider making your budgeted donations now (i.e. Bellevue Schools Foundation, Bellevue Quality School, etc.).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Begin asking for volunteers to serve on your Nominating Committee.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Continue promotion of Reflections. Check with Bellevue PTSA Council Reflections Committee for deadlines.</li> </ul>	<input type="checkbox"/>
<b>NOVEMBER</b>		
	<ul style="list-style-type: none"> <li>Ensure that your PTA's insurance has been paid.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li><b>Ensure that a Tax Return (990) is filed with the IRS no later than November 15<sup>th</sup>.</b></li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make certain that you know when your Annual Corporate Renewal is due (typically the anniversary month of your PTA's incorporation).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Consult your PTA's Standing Rules to determine if there is a deadline for electing a Nominating Committee. Consider electing your Nominating Committee at your next General Membership Meeting.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Reflections projects should be nearing completion.</li> </ul>	<input type="checkbox"/>
<b>DECEMBER</b>		
	<ul style="list-style-type: none"> <li>Reflections projects should be completed for judging at council level. Check with Bellevue PTSA Council for specific deadlines.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Review if all of your PTA's Elected Officers have attended a training as required by WSPTA. If not, follow up and plan for them to attend a training.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Consider another push for membership in January.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Continue to make sure that membership invoices are being paid to the WSPTA.</li> </ul>	<input type="checkbox"/>
<b>JANUARY</b>		
	<ul style="list-style-type: none"> <li>Take stock of your PTA's achievements thus far and review what you need to do in the balance of the year for the welfare of the children in your school and community.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Look ahead, February is a very busy month. Take some time to make sure you are on the right track to get all of your awards submissions in on time (deadlines are at the beginning of March).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Consider conducting a Mid-Year Financial Review. Keeps you on a good financial track.</li> </ul>	<input type="checkbox"/>

	<ul style="list-style-type: none"> <li>Attend and promote the Bellevue PTSA Council's Reflections Program Events.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>If you have not already done so, plan to elect a Nominating Committee. This is critical to the health of your PTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Appoint an awards committee (including Golden Acorn) if you have not already done so.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Review the Standards of Excellence awards form to see if you are following best practices.</li> </ul>	<input type="checkbox"/>
<b>FEBRUARY</b>		
	<ul style="list-style-type: none"> <li>Prepare your WSPTA Awards applications. All applications are available on the WSPTA website. Deadline for applications is March 1<sup>st</sup>.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Attend the Region 2 Mid-Winter Conference (all board members are welcomed to attend). <i>Have all of your PTA elected officers attended a qualified training as required by the WSPTA?</i></li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Think about your PTA's presence at open houses and information nights (i.e. Kindergarten information night, middle school and high school information nights).</li> </ul>	<input type="checkbox"/>
<b>MARCH</b>		
	<ul style="list-style-type: none"> <li>Appoint a budget committee to begin work on next years budget which must be approved by General Membership at a meeting prior to June.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make sure that your Nominating Committee is meeting and making progress in nominations for officers for next school year board.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Consult your Standing Rules to comply with the proper time to hold elections. Officers must be elected by June but preferably prior to the WSPTA Convention.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Start planning for who will be able to attend the WSPTA Convention and be voting delegates for your PTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make sure your membership dues invoices are being paid.</li> </ul>	<input type="checkbox"/>
<b>APRIL</b>		
	<ul style="list-style-type: none"> <li>Register for WSPTA Convention.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Consult your Standing Rules and make sure that board members and committee chairs are aware of deadlines for expense reimbursement.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Be sure that your Budget Committee is completing their work. Budget must be approved by June.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Appoint a Financial Review Committee (review to be done after books closed on June 30<sup>th</sup>).</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make certain that you have a General Membership Meeting planned to hold elections. This is a great month in which to hold your elections.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make certain that you have a General Membership Meeting scheduled to approve the next years operating budget and Standing Rules (you cannot conduct business over the summer without an approved budget).</li> </ul>	<input type="checkbox"/>
<b>MAY</b>		
	<ul style="list-style-type: none"> <li>Make certain that your WSPTA Convention delegates are registered and able to attend the Convention.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Plan to attend the Bellevue PTSA Council Awards and Recognitions Event.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Make sure that you have a General Membership meeting to approve the budget for next school year and that you have elected officers for the next school year.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Plan any volunteer appreciation events or activity.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Be sure a Financial Review Committee has been appointed.</li> </ul>	<input type="checkbox"/>

	<ul style="list-style-type: none"> <li>▪ Work to fill board positions (i.e. Committee Chairs, Reflections Chair, Advocacy Chair, etc.)</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Ask delegates to report on the WSPTA Convention.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ <b>Check to see that Annual Corporate Renewal and Charitable Solicitations report is completed.</b></li> </ul>	<input type="checkbox"/>
<b><i>JUNE</i></b>		
	<ul style="list-style-type: none"> <li>▪ Acknowledge your volunteers and your board members and thank them for their work.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Make certain that you have a budget in place.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Make certain that you have a Financial Review Committee in place.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Make certain that any final membership payments have been made.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Plan a transition meeting between the existing board of directors and the incoming board of directors.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Submit a list of your officers and board members for the next school year to the WSPTA.</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>▪ Make sure that all reimbursements are completed and that the books are being prepared to be closed and transferred to the next Treasurer.</li> </ul>	<input type="checkbox"/>