

STANDARDS OF EXCELLENCE CHECKLIST

	Date	Item Needed
<input type="checkbox"/>	March	GM meeting minutes - Golden Acorn and other awards
<input type="checkbox"/>		Copy of Standing Rules - in effect at the time the awards are given
<input type="checkbox"/>		Copy of Newsletter with Awards Recognition (previous or current year)
<input type="checkbox"/>		Spring Membership Drive
<input type="checkbox"/>	April	April meeting minutes - election of 2014-2015 officers
<input type="checkbox"/>		Copy of signed Nominating Committee Report
<input type="checkbox"/>		Convention registration - up to 4 people
<input type="checkbox"/>		Copy of Budget - line item for Convention
<input type="checkbox"/>	May/June	Method of determining members' needs #1 (end of year survey)
<input type="checkbox"/>		Officer and Committee Chair Transition Plan
<input type="checkbox"/>		Copy of Program Evaluation form
<input type="checkbox"/>		End of year Financial Review Checklist
<input type="checkbox"/>		End of year Financial Review Report
<input type="checkbox"/>	August	Post General Membership Meeting dates - Copy of GM notification of GM
<input type="checkbox"/>		Post Board of Directors Meeting dates - Copy of GM notification of BOD
<input type="checkbox"/>		Region 2 Fall Conference registration - up to 6 people (for year)
<input type="checkbox"/>	September	GM meeting minutes - year end Financial Review Results
<input type="checkbox"/>		GM meeting minutes - Budget approval
<input type="checkbox"/>		GM meeting minutes - Standing Rules approval
<input type="checkbox"/>		BOD or GM meeting minutes - Goals approval
<input type="checkbox"/>		Copy of Standing Rules
<input type="checkbox"/>		Copy of Budget
<input type="checkbox"/>		Copy of Goals
<input type="checkbox"/>		Copy of financial report for July and August
<input type="checkbox"/>		Communication example - newsletter, FB, website, e-news
<input type="checkbox"/>		Fall Membership campaign
<input type="checkbox"/>	October	GM Meeting minutes - volunteer appreciation example
<input type="checkbox"/>		Copy of financial report for September
<input type="checkbox"/>		Copy of AIM insurance certificate
<input type="checkbox"/>		Legislative Assembly registration - up to 3 people
<input type="checkbox"/>		PTA and the Law registration - up to 4 people
<input type="checkbox"/>	November	Copy of financial report for October
<input type="checkbox"/>		GM meeting minutes - Nominating Committee election
<input type="checkbox"/>		GM meeting minutes - Nominating Committee alternates - election
<input type="checkbox"/>	December	Copy of financial report for November
<input type="checkbox"/>	January	Copy of financial report for December
<input type="checkbox"/>		Winter membership campaign
<input type="checkbox"/>		Focus Day registration - up to 3 people
<input type="checkbox"/>	February	Copy of financial report for January
<input type="checkbox"/>		Mid Winter Conference or other training total of 6 people (for year)
<input type="checkbox"/>		Council meeting attendance documentation from Council Sec.
<input type="checkbox"/>		Training Bylaw documentation from Council President
<input type="checkbox"/>		
<input type="checkbox"/>		Additional Items
<input type="checkbox"/>	*	Method of determining members' needs 2nd example
<input type="checkbox"/>	*	Programs and Activities designed to address Goals
<input type="checkbox"/>	1	Program/Activity for which goal?
<input type="checkbox"/>	2	Program/Activity for which goal?
<input type="checkbox"/>	3	Program/Activity for which goal?
<input type="checkbox"/>	4	Completed Program/Activity evaluation form
<input type="checkbox"/>		Our PTSA is child focused and advocates for children
<input type="checkbox"/>	1	example of advocacy or addressing needs of children
<input type="checkbox"/>	2	example of advocacy or addressing needs of children
<input type="checkbox"/>	3	example of advocacy or addressing needs of children
<input type="checkbox"/>		IRS and State of Washington requirements
<input type="checkbox"/>	*	Copy of fiscal year 2013-2014 tax filing (990* form)
<input type="checkbox"/>	*	Copy of fiscal year 2013-2014 Charitable Solicitations renewal
<input type="checkbox"/>	*	Copy of Annual Corporate renewal July-Feb current/Mar-June previous year
<input type="checkbox"/>		Example of working with other PTAs or similar organization - ISF, VIS
<input type="checkbox"/>		Our PTSA shares info from Council/Region2/WSPTA/ NPTA
<input type="checkbox"/>	Council 2.6	
<input type="checkbox"/>	Region 2	
<input type="checkbox"/>	WSPTA	
<input type="checkbox"/>	NPTA	

Notes: