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| PTA 2015-16 Quick Reference Checklist*Based on: Council Monthly PTD’s, WSPTA’s Best Practices, Standards of Excellence, and Standards of Affiliation*  |
| http://www.clipartbest.com/cliparts/dTr/77L/dTr77L8T9.gifJuly and August |
| □ | Confirm with Treasurer new signature cards have been completed at the bank for all signers. The treasurer should maintain a copy of the signature cards from the bank for your records. |
| □ | Meet with your Board of Directors to firm up plans for the new school year. (Do this earlier than later, if possible) [Doodle.com](http://doodle.com/) is a great (free) resource to help you find a date/time that works best for everyone. |
| □ | Have board members review and sign Code of Conduct and Conflict of Interest forms. Contact council for examples. |
| □ | If not already done, review [WSPTA 2015 Bylaws](http://www.wastatepta.org/resources/bylaws/Bylaws_2015-16.pdf) For quick reference: [Summary of changes to WSPTA Bylaws](http://www.wastatepta.org/resources/bylaws/Bylaws_Changes_2015-16.pdf). |
| □ | Ensure the Treasurer gives monthly financial reports to the board of directors and/or membership for June and July. June financial report should be emailed to the board in July, and July financial report should be emailed to board or presented in a BOD meeting in August. August financial report should be presented at a board/GM meeting in September. Make a copy of both the June and July financial reports. You will need these for your Standards of Excellence (aka SoE) application. |
| □ | Confirm who the Treasurer will give the unopened monthly bank statements to. (This person must be a PTA member who is a non-signer on the bank account. They are responsible for opening, reviewing, and signing off on each month’s bank statements. They should have access to review PayPal statements for online transactions, too. This person should provide a monthly report and let the board know if there are any concerns or missing money.  |
| □ | Develop SMART goals for your PTA’s upcoming school year. (SMART= specific, measurable, achievable, results-focused, timely).  |
| □ | Type up the process you used to develop your SMART goals (i.e. explain why goals were chosen) and the process you will use to evaluate your progress toward meeting goals and how you’ll know when they are met. NOTE: This checklist item is only needed if you plan to apply for Platinum level section of SoE application. |
| □ | Identify at least 2 different methods of how your PTA is determining members’ needs during the year (for SoE app). Also, provide an example or narrative on changes you made to a specific program based on members’ needs- for SoE app). For Platinum level section of SoE: Provide up to 3 additional different methods used for determining members’ needs. |
| □ | Establish your Communications plan for the year (eNews/FB/website/etc.). |
| □ | Review 2015-16 interim budget approved in late Spring. Make any suggested changes and vote in again at 1st GM Mtg. |
| □ | Set PTA Board and GM meetings for the year. Post BOTH in more than 1 public place for membership to see (i.e. directory, website, school bulletin board, etc.). Print a copy or screen print how you publicized both of these to your members for SoE app. |
| □ | Review your PTA’s Standing Rules. Prepare any proposed changes for approval by membership at 1st GM Mtg. Do your Standing Rules include [changes made to WSPTA Bylaws](http://www.wastatepta.org/resources/bylaws/Bylaws_Changes_2015-16.pdf) and verbiage regarding WSTPA’s Standards of Affiliation? ([sample wording here](http://www.mmsend60.com/link.cfm?r=2344488929&sid=81869486&m=11017969&u=WSPTA&j=29845849&s=http://www.mmsend60.com/link.cfm?r=2212718767&sid=81803668&m=11054097&u=WSPTA&j=29819879&s=https%3A%2F%2Fimages.magnetmail.net%2Fimages%2Fclients%2FWSPTA%2Fattach%2FStanding_Rules_Suggested_Wording_jpg.jpeg)) |
| □ | Do your Standing Rules state what awards your PTA offers each year (i.e. Golden Acorn, Outstanding Adv, Educator, etc.)? Print and highlight section of your Standing Rules reflecting awards offered- needed for your Sof E app. |
| □ | Ensure Fiscal YE [Financial Review](https://www.wastatepta.org/leadership/pta_law/1314/Financial_Review_Checklist_2013.pdf) was completed and written report provided by Financial Review Committee or CPA. |
| □ | Ensure you have a Membership campaign for the entire year. Work with the district to be included in early August’s EVP launch.  |
| □ | If not already done, meet with Principal to review calendar of events for upcoming year. Meet regularly w/ principal. |
| □ | Plan as a board to attend the Region 2 Fall Conference for training and helpful tips. Usually held in mid/late August. Attend [other trainings advertised](http://www.issaquahptsa.org/pta-training-events) and offered by Issaquah PTSA Council/Region (Print copy of all attendees’ certificates or registrations- 1 pt per attendee, max 6 pts on SoE application for regional conferences, webinars, leadership conf, WSPTA approved council and regional trainings) [WSPTA’s Training Tracking Sheet](http://www.mmsend60.com/link.cfm?r=2344488929&sid=81869485&m=11017969&u=WSPTA&j=29845849&s=http://www.mmsend60.com/link.cfm?r=2212718767&sid=81803667&m=11054097&u=WSPTA&j=29819879&s=https%3A%2F%2Fimages.magnetmail.net%2Fimages%2Fclients%2FWSPTA%2Fattach%2FTraining_Tracking_Spreadsheet_2015_16.xlsx) |
| □ | Update your PTA’s Legal Doc Notebook(s). Standing Rules should indicate the officer(s) responsible to maintain. Check records due for destruction. Label records with destruction date or permanently kept. [WSPTA’s Legal Documents Retention document](http://www.wastatepta.org/handouts/conv_15/300/Secretary%20More%20Than%20Just%20Minutes%20HO%20Legal%20Documents%20and%20Retention.pdf) |
| □ | Send the council webmaster, Cindy Kelm, a list of your Board and General Membership dates for the year. |
| □ | Confirm the Secretary is comfortable with how to record meeting minutes, motions, etc. Top of your minutes should include the date, time, location, attendees, and quorum present. (GM minutes are approved at GM meetings. Board mtg minutes are approved at board meetings- both should be publicly available to members).  |
| http://www.clipartbest.com/cliparts/dTr/77L/dTr77L8T9.gifSeptember |
| □ | Review [WSPTA Standards of Affiliation Contract](http://www.mmsend60.com/link.cfm?r=2344488929&sid=81882889&m=11017969&u=WSPTA&j=29845849&s=https://images.magnetmail.net/images/clients/WSPTA/attach/SOA_Contract_2015.pdf) to ensure all requirements are met by 10/31/15 postmark deadline. |
| □ | Ensure the Treasurer gives July and August financial reports to the board of directors and/or membership. The report should include that PayPal and bank statements were opened/reviewed and signed by a non-signer. The Treasurer should also report whether there were claims/no claims filed against your PTA’s insurance during the months of July and August. (Print a copy of the July and August financial reports for your SoE application) |
| □ | Plan to attend the September [Issaquah Council PTSA Council membership meeting](http://www.issaquahptsa.org/category/news/calendar) (usually 2nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! |
| □ | Provide your [council voting delegate form](http://www.issaquahptsa.org/?attachment_id=3017) to Issaquah PTSA Council Secretary, Korista Smith-Barney. Deadline Oct Council GM. |
| □ | Sign up for [PTA and the Law training](http://www.issaquahptsa.org/pta-training-events), if still needed. At least 1 elected officer must attend, but open to all PTA/board members, too. (Print copy of all attendees’ certificates- up to 4 people for max SoE app points). [WSPTA’s Training Tracking Sheet](http://www.mmsend60.com/link.cfm?r=2344488929&sid=81869485&m=11017969&u=WSPTA&j=29845849&s=http://www.mmsend60.com/link.cfm?r=2212718767&sid=81803667&m=11054097&u=WSPTA&j=29819879&s=https%3A%2F%2Fimages.magnetmail.net%2Fimages%2Fclients%2FWSPTA%2Fattach%2FTraining_Tracking_Spreadsheet_2015_16.xlsx) |
| □ | Make sure names/email addresses for your board members are on your website (parent ed, advocacy, etc.) |
| □ | Have a presence at your school’s Curriculum Night(s). Great tri-fold and other resources are available from council. |
| □ | Hold your first General Membership meeting of the year (either in September or early October). Make sure to do the following at your first GM meeting and record the information in your minutes:• Financial Review Report for fiscal year 2014-15 (July 2014/June 2015) provided to members (print copies of BOTH the Financial Review report as well as a copy of GM minutes showing YE review results reported to members- needed for your SoE app)• Monthly financial reports for July/August presented and filed for review (print copy of reports for SoE app)• 2015-16 Budget Approval by membership (print copies of BOTH the budget and minutes approving budget for SoE app)• Mission and Goals Approval by membership (print copies of BOTH goals and minutes approving goals for your SoE appn)• Standing Rules for 2015-16 Approved by membership (print copies of BOTH SR’s and minutes approving SR’s for SoE app)• Provide Membership report to your membership• GM Minutes from your prior GM meeting are presented and approved (Note: GM minutes are approved at GM meetings.  Board minutes are approved at board meetings- both should be publicly available to members). |
| □ | Share an article or information from Council, Region 2, WSTPA and/or National PTA with members. (i.e. at GM meeting, in eNews, Facebook) Print examples for each using 2 different communication methods you regularly use to communicate with members. For Facebook, you will need to provide multiple posts from varying months to demonstrate regular communications. Information shared can be from a Council or Region training or meeting, [WSPTA](http://www.wastatepta.org/index.html) or [National PTA](http://www.pta.org/newsevents/newsroom.cfm?navItemNumber=4179) websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE) |
| □ | Membership Campaign for FALL- Work towards 100% Staff Membership and General Membership• Invite prior members to rejoin the PTA. Promote on Facebook, in eNews, and eBlasts.• Work with Principal and ensure all Teachers/Staff have a PTA membership form and encourage them to join• Invite members of the community and school board members to join your PTA.  |
| □ | Start promoting PTA Reflections Program. Don’t have a Reflections chair? Contact Council Reflections chair for help. |
| □ | September 30th- Bronze Membership Award Deadline (no application needed). Based on your uploaded membership count. To receive Bronze award, 50% of last year’s members enrolled. **(Extended for 2015! New deadline is now 10/25/15 same as Silver)** |
| □ | Hold a chair and volunteer orientation/training meeting. Make sure:• Chairs/volunteers are current dues paying PTA members• Completed the district background requirements for volunteers • Feel comfortable with their responsibilities (Have what they need, know their approved budget, understand how to submit a Program Planning form, Post Event Program Evaluation form, and submitting expense reimbursement). In need of sample Program Planning and Post Event Program Evaluation forms? Contact your Council VP for help.For Platinum level section of SoE: Provide written description of committee chair training. |
| □ | Identify 3 Programs/Activities designed to address your PTSA/PTA’s Goals for the year. (Print example of each activity and indicate which goal it addresses- for SoE app). For Platinum level section SoE: include program eval forms for the 3 programs. |
| □ | Print a copy of 1 completed Post Event Program Evaluation form (for your SoE app). Don’t have this? Contact council VP for help. |
| http://www.clipartbest.com/cliparts/dTr/77L/dTr77L8T9.gifOctober |
| □ | Confirm at least 1 elected officer has attended or currently signed up for [PTA and the Law](http://www.issaquahptsa.org/pta-training-events) training. (Print copy of all attendees’ certificates- up to 4 people for maximum SoE application points). |
| □ | Ensure the Treasurer gives a September financial report to the board of directors and/or membership. The report should include that PayPal and bank statements were opened/reviewed and signed by a non-signer. The Treasurer should also report whether there were claims/no claims filed against your PTA’s insurance during September. (Print September financials for your SoE app) |
| □ | Plan to attend the October [Issaquah Council PTSA Council membership meeting](http://www.issaquahptsa.org/category/news/calendar) (usually 2nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! |
| □ | Make sure that membership is uploaded via PT-Avenue and invoices are being paid to the WSPTA. |
| □ | Share an article or information from Council, Region 2, WSTPA and/or National PTA with members. (i.e. at GM meeting, in eNews, Facebook) Print examples for each using 2 different communication methods you regularly use to communicate with members. For Facebook, you will need to provide multiple posts from varying months to demonstrate regular communications. Information shared can be from a Council or Region training or meeting, [WSPTA](http://www.wastatepta.org/index.html) or [National PTA](http://www.pta.org/newsevents/newsroom.cfm?navItemNumber=4179) websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE) |
| □ | Membership - Where are you vs. your FTE count and membership goal? Make sure new families join! Print a DATED example of Fall membership campaign (~Aug-Oct). Need campaign ideas? Talk to Council Membership chair, Caroline Brown. |
| □ | Register for WSPTA Legislative Assembly- Oct 24th Details on [WSPTA website](http://www.wastatepta.org/advocacy/index.html). Encourage board/members to attend. (Print copy of all attendees’ registrations- up to 3 people for maximum SoE application points). Give a recap of Leg Assembly to members.For Platinum level section of SoE: Print example of how you shared info with members (i.e. minutes, newsletter, website, etc.) |
| □ | Mention any dates at your GM meeting regarding Meet the Candidate forums/Town Hall meetings for school board or local legislators. (copy GM minutes that you shared advocacy/leg info with members. October is ideal before November elections)  |
| □ | Recognize volunteers on a regular basis. Thank them for their work. Print out at an example of how volunteers were appreciated. (2 examples needed for SoE app- must provide at least 2 different examples with different recognition methods)For Platinum level section of SoE: up to 3 additional examples of different methods recognizing volunteers |
| □ | Consider making your budgeted donations now for the year for: VIS, Issaquah Schools Foundation, etc. |
| □ | Confirm when your PTA Annual Corporate Renewal date is. (Due annually by last day of month PTA incorporated). Obtain copy of current fiscal year renewal if incorporation date between July1-Feb 28, or the prior fiscal year if incorp. date March 1-June 30. |
| □ | Regular communication should be provided to members regarding PTA issues and activities (local, council, region, state, and national PTA). Print examples of 2 different methods of communication you regularly use with members (for SoE application). For Platinum level section of SoE application: provide up to 3 additional examples of different methods of communication. |
| □ | Identify 3 different examples of how your PTA advocates or addresses needs of children in local community, district, region, state or nation. (Each example is worth 2 pts for your SoE application- you cannot submit multiple examples of same advocacy method). For Platinum level section of SoE: Identify up to 2 more examples of how your PTA advocates or addresses needs. |
| □ | Once all elected officers have completed their WSPTA training requirements. Make a copy of your [WSPTA’s Training Tracking Sheet](http://www.mmsend60.com/link.cfm?r=2344488929&sid=81869485&m=11017969&u=WSPTA&j=29845849&s=http://www.mmsend60.com/link.cfm?r=2212718767&sid=81803667&m=11054097&u=WSPTA&j=29819879&s=https%3A%2F%2Fimages.magnetmail.net%2Fimages%2Fclients%2FWSPTA%2Fattach%2FTraining_Tracking_Spreadsheet_2015_16.xlsx) for your records. (For Platinum level section of SoE: copy of training tracking sheet is needed, too) |
| □ | For Platinum level section of SoE: Share at least 2 articles from 2 different publications of the [National PTA magazine Our Children](http://www.pta.org/newsevents/content.cfm?ItemNumber=1177&navItemNumber=574). Attach up to 2 examples of how your PTA shared the information.  |
| □ | Continue promotion of Reflections. Need assistance? Contact Council Reflections chair, Yvette Blauvelt. |
| □ | For Platinum level section of SoE: Include up to 2 examples (flyer, article, other resource) promoted in another language of how your PTA reaches out to address needs of diverse populations. |
| □ | For Platinum level section of SoE: Provide up to 2 examples or a narrative of a program/event/committee/outreach to one of your diverse populations.  |
| □ | **Oct. 31st – Postmarked deadline for** [**Standards of Affiliation Contract**](http://www.mmsend60.com/link.cfm?r=2344488929&sid=81882889&m=11017969&u=WSPTA&j=29845849&s=https://images.magnetmail.net/images/clients/WSPTA/attach/SOA_Contract_2015.pdf) **to WSPTA Office.** (Keep a copy for Records and SoE app) |
| □ | For Platinum level section of SoE: Include examples of the WSPTA and National PTA programs and resources your PTA makes use of. Maximum of up to 5 examples can be provided. At least one example from each association (WSPTA and NPTA) is required. |