

Acronyms

SoE= Standards of Excellence

GM= General Membership

EVP= Enrollment Verification Process

PTA 2015-16 Checklist

Based on: Council Monthly PTD's, WSPTA's Best Practices, Standards of Excellence, and Standards of Affiliation



July and August

<input type="checkbox"/>	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.
<input type="checkbox"/>	Meet with your Board of Directors to firm up plans for the new school year. (Do this earlier than later, if possible) Doodle.com is a great (free) resource to help you find a date/time that works best for everyone.
<input type="checkbox"/>	Have board members review and sign Code of Conduct and Conflict of Interest forms. Contact council for examples.
<input type="checkbox"/>	If not already done, review WSPTA 2015 Bylaws For quick reference: Summary of changes to WSPTA Bylaws .
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Develop SMART goals for your PTA's upcoming school year. (SMART= specific, measurable, achievable, results-focused, timely).
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Establish your Communications plan for the year (eNews/FB/website/etc.).
<input type="checkbox"/>	Review 2015-16 interim budget approved in late Spring. Make any suggested changes and vote in again at 1 st GM Mtg.
<input type="checkbox"/>	Set PTA Board <u>and</u> 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.
<input type="checkbox"/>	Review your PTA's Standing Rules. Prepare any proposed changes for approval by membership at 1 st GM Mtg. Do your Standing Rules include changes made to WSPTA Bylaws and verbiage regarding WSTPA's Standards of Affiliation? (sample wording here)
<input type="checkbox"/>	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.
<input type="checkbox"/>	Ensure Fiscal YE Financial Review was completed and written report provided by Financial Review Committee or CPA.
<input type="checkbox"/>	Ensure you have a Membership campaign for the entire year. Work with the district to be included in early August's EVP launch.
<input type="checkbox"/>	If not already done, meet with Principal to review calendar of events for upcoming year. Meet regularly w/ principal.
<input type="checkbox"/>	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 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
<input type="checkbox"/>	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
<input type="checkbox"/>	Send the council webmaster, Cindy Kelm , a list of your Board and General Membership dates for the year.
<input type="checkbox"/>	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).

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September

<input type="checkbox"/>	Review WSPTA Standards of Affiliation Contract to ensure all requirements are met by 10/31/15 postmark deadline.
<input type="checkbox"/>	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)
<input type="checkbox"/>	Plan to attend the September Issaquah Council PTSA Council membership meeting (usually 2nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too!
<input type="checkbox"/>	Provide your council voting delegate form to Issaquah PTSA Council Secretary, Korista Smith-Barney. Deadline Oct Council GM.
<input type="checkbox"/>	Sign up for PTA and the Law training, 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
<input type="checkbox"/>	Make sure names/email addresses for your board members are on your website (parent ed, advocacy, etc.)
<input type="checkbox"/>	Have a presence at your school's Curriculum Night(s). Great tri-fold and other resources are available from council.
<input type="checkbox"/>	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: <ul style="list-style-type: none"> • 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 app) • 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).
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	Membership Campaign for FALL- Work towards 100% Staff Membership and General Membership <ul style="list-style-type: none"> • 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.
<input type="checkbox"/>	Start promoting PTA Reflections Program. Don't have a Reflections chair? Contact Council Reflections chair for help.
<input type="checkbox"/>	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)
<input type="checkbox"/>	Hold a chair and volunteer orientation/training meeting. Make sure: <ul style="list-style-type: none"> • 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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Print a copy of 1 completed Post Event Program Evaluation form (for your SoE app). Don't have this? Contact council VP for help.

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October

<input type="checkbox"/>	Confirm at least 1 elected officer has attended or currently signed up for PTA and the Law training . (Print copy of all attendees' certificates- up to 4 people for maximum SoE application points).
<input type="checkbox"/>	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)
<input type="checkbox"/>	Plan to attend the October Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too!
<input type="checkbox"/>	Make sure that membership is uploaded via PT-Avenue and invoices are being paid to the WSPTA.
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	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 .
<input type="checkbox"/>	Register for WSPTA Legislative Assembly- Oct 24 th Details on WSPTA website . 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.)
<input type="checkbox"/>	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)
<input type="checkbox"/>	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
<input type="checkbox"/>	Consider making your budgeted donations now for the year for: VIS, Issaquah Schools Foundation, etc.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Once all elected officers have completed their WSPTA training requirements. Make a copy of your WSPTA's Training Tracking Sheet for your records. (For Platinum level section of SoE: copy of training tracking sheet is needed, too)
<input type="checkbox"/>	For Platinum level section of SoE: Share at least 2 articles from 2 different publications of the National PTA magazine Our Children . Attach up to 2 examples of how your PTA shared the information.
<input type="checkbox"/>	Continue promotion of Reflections. Need assistance? Contact Council Reflections chair, Yvette Blauvelt .
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Oct. 31st – Postmarked deadline for Standards of Affiliation Contract to WSPTA Office. (Keep a copy for Records and SoE app)
<input type="checkbox"/>	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.

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 November

<input type="checkbox"/>	Ensure your PTA's insurance has been renewed and paid by November 10th to AIM Insurance . Treasurer should report the renewal to the board and/or membership. Record in minutes.
<input type="checkbox"/>	Ask the Treasurer to obtain a current fiscal year Certificate of Insurance. If Treasurer doesn't have one, they can call AIM and request one be emailed. (Print copy of AIM Insurance Certificate for your SoE application)
<input type="checkbox"/>	Membership campaign for WINTER- Where are you vs. your FTE count and membership goal? Print a DATED example of what you did for your Winter membership campaign (~Nov-Dec) and how it differs from your Fall campaign. Need campaign ideas? Talk to Council Membership chair, Caroline Brown .
<input type="checkbox"/>	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
<input type="checkbox"/>	Plan to attend the November Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too!
<input type="checkbox"/>	Ensure the Treasurer gives an October 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 October. (Print October financials for your SoE app)
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	Begin asking for volunteers to serve on your PTSA/PTA's Nominating Committee.
<input type="checkbox"/>	Print a copy of your 2015-16 budget and highlight the line item budgeted for 2016 Convention attendance. (For your SoE app).
<input type="checkbox"/>	Start promoting the Student Essay Contest "Male Role Model in My Life" - This is a great opportunity for students to write essays about an important male role model. 2015-16 Essay Application must be postmarked by 3/1/16. (print example of how you promoted it to your members (i.e. eNews) Needed for SoE application.
<input type="checkbox"/>	At your next GM meeting, make sure to report on the completed 2015 Standards of Affiliation (SOA). Document in GM minutes it was discussed with membership. For Platinum level section of SoE: make copy of minutes showing SOA discussed.
<input type="checkbox"/>	Ensure that a fiscal year 2014-15 Tax Return (990/990EZ/990-N) e-postcard is filed with the IRS no later than November 15th . Have the Treasurer report to board and/or members and record in minutes. (Make copy of filing or acceptance letter for SoE. For Platinum level section of SoE: copy of GM minutes showing 2014-15 tax filing (or acceptance letter) reported to members.
<input type="checkbox"/>	For SoE: Obtain a copy of the fiscal year 2014-15 charitable solicitations renewal (or acceptance letter). If no charitable solicitations is required, copy your year-end financials showing last year's total income from all sources was less than \$50,000.
<input type="checkbox"/>	If not already done, 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.)
<input type="checkbox"/>	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 GM Meeting. Conducting Nom Comm Election per WSPTA Bylaws, Article 5, Section 5 . Make copy of GM minutes showing election of Nominating Committee for SoE application.
<input type="checkbox"/>	Local unit Reflections entry winners should be selected. Reflection winners should then be turned in to Council Reflections Chair, Yvette Blauvelt , on Nov 20 th (1-3pm at Issaquah Library Mtg Room). For Platinum level section of SoE: Copy of your PTA's Reflections participation form, copy of an advertisement to members about Reflections program, and an example of Student Artist Recognition.

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 December

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| <input type="checkbox"/> | Plan to attend the December Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! |
| <input type="checkbox"/> | Ensure the Treasurer gives a November 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 November. (Print November financials for SoE app) |
| <input type="checkbox"/> | Review training completed by your PTA's Elected Officers. Ensure all elected officers have attended training as required by WSPTA and keep documentation training was completed (Class certificate, eBrite registration, etc.) Follow up with officers who need to complete training and develop an internal deadline for them to complete. WSPTA's Training Tracking Sheet |
| <input type="checkbox"/> | 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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE) |
| <input type="checkbox"/> | 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 |
| <input type="checkbox"/> | Continue to make sure that membership is uploaded via PT-Avenue and invoices are being paid to the WSPTA |
| <input type="checkbox"/> | For Platinum level section of SoE: If not already done, share at least 2 articles from 2 different publications of the National PTA magazine Our Children . Attach up to 2 examples of how your PTA shared the information. |

 January

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|--------------------------|--|
| <input type="checkbox"/> | Hold a mid-year retreat or meeting with your board to discuss and evaluate your PTA's achievements thus far and review what you need to do in the balance of the year to meet the goals and needs of your PTA. What is your PTA's process to evaluate current year's goals, programs and activities? (Surveys, suggestion box, post event evaluations, GM open forum, etc.) |
| <input type="checkbox"/> | If not already done, 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. |
| <input type="checkbox"/> | Membership campaign for SPRING- Where are you vs. your FTE count and membership goal? Print a DATED example of what you did for your Spring membership campaign (~Jan-Feb) and how it differs from your Fall and Winter campaigns. Need campaign ideas? Talk to Council Membership chair, Caroline Brown . |
| <input type="checkbox"/> | Plan to attend the January Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! |
| <input type="checkbox"/> | Register to attend Focus Day on the WSPTA website (scheduled for Wednesday, Feb 3 rd). Encourage board/members to attend. (Print copy of attendees' registrations- up to 3 people for SoE application points). Give a recap of Focus Day to members. For Platinum level section of SoE: Print example (i.e. minutes, newsletter, website, etc.) of how you shared Focus Day info with members. Can be in advance of event to encourage attendance or after event to report back. |
| <input type="checkbox"/> | If you haven't already done so, elect your Nominating Committee at your January GM Meeting. Conducting Nom Comm Election per WSPTA Bylaws, Article 5, Section 5 . Make copy of GM minutes showing election of Nominating Committee. |
| <input type="checkbox"/> | Ensure the Treasurer gives a December 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 December. (Print copy of December financials for SoE app) |
| <input type="checkbox"/> | It's recommended to conduct a Mid-Year Financial Review (for the months of July 2015-January 2016). Have the review committee give a report at next GM meeting and document in minutes. Make a copy of the YE Review for your SoE application. For Platinum Level Section of SoE: Also make copy of the YE financial review for the prior year (months July 2014-January 2015). Include copy of GM minutes showing (July 2014-January 2015) mid-year financial review results were reported to membership. |
| <input type="checkbox"/> | 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 |

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<input type="checkbox"/>	Try to attend and promote the Issaquah PTSA Council's Reflections Reception at IHS on January 12 th (6:30-8pm)
<input type="checkbox"/>	If not already done, start promoting the Student Essay Contest "Male Role Model in My Life" - This is a great opportunity for students to write essays about an important male role model. 2015-16 Essay Application must be postmarked by 3/1/16. (print example of how you promoted it to your members (i.e. eNews) Needed for SoE)
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	If not already done, appoint an awards/recognition committee. Have them start promoting award submissions (i.e. Acorn, Outstanding Adv, Educator, etc.) Plan to have winners announced before 3/1, so you can include them in your SoE application.
<input type="checkbox"/>	For your January GM Meeting, make sure to do the following and <u>include the information in your minutes</u> : <ul style="list-style-type: none"> • Mid-year Financial Review Report given, if one was done (print a copy for SoE submission) • Elect your Nominating Committee, if not already done. Conducting Nom Comm Election per WSPTA Bylaws, Article 5, Sec 5. (Make copy of GM minutes showing election of Nominating Committee) • Report on Legislative Assembly, if not already done • Explain what Focus Day is and encourage PTA General Membership to attend next month, Feb 3rd. • Provide Membership report to your membership. Keep working toward 100% Staff and 100% General Membership • Express appreciation to your volunteers up to this point (print out copy of minutes showing this was done- needed)
<input type="checkbox"/>	Once elected, have your Nominating Committee attend the council/Region 2 training for Nominating Committees. The date and additional info for this training will follow shortly. Nominating Committee Handbook.
<input type="checkbox"/>	Look ahead, February is a <u>very</u> busy month. Take some time to make sure you're on the right track to complete award application submissions, including Standards of Excellence. Submission postmark deadline is 3/1/16!!
<input type="checkbox"/>	January 25 th - Gold Membership Award deadline (no application needed). Based on your uploaded membership count. To receive Gold award, 10% increase over last year's total paid members.
<input type="checkbox"/>	January 31 st - Treasurer's Deadline for: <ul style="list-style-type: none"> • IRS Form 1099-MISC to any Independent Contractor(s) used. • Sales Tax Form Due to WA State Dept of Revenue • Reseller's Permit (verify renewal date if your unit has one)
<input checked="" type="checkbox"/>	February
<input type="checkbox"/>	Attend Focus Day (scheduled for Wednesday, Feb 3 rd). Give a recap to membership and record in meeting minutes.
<input type="checkbox"/>	Plan to attend the February Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too!
<input type="checkbox"/>	Ensure the Treasurer gives a January 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 January. (Print January financials for your SoE application)
<input type="checkbox"/>	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
<input type="checkbox"/>	Prepare final pieces of info for your WSPTA Awards applications. All applications WSPTA website. Deadline 3/1! <ul style="list-style-type: none"> • Membership Award Applications- (100% Teacher, 100% Membership, Seedling, and Sapling)- copy apps for SoE Platinum level. • Local PTA and Council Award Applications to WSPTA Office (Standards of Excellence, Outstanding Communications, Outstanding Newsletter& eBlast, Outstanding Website, Outstanding Local Unit of the Year). • PTA Men's Essay Contest Entries to WSPTA Office
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)

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<input type="checkbox"/>	Consider attending the Region 2 Mid-Winter Conference - <i>Have all your PTA elected officers attended a qualified required WSPTA training?</i> (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
<input type="checkbox"/>	Think about your PTA's presence at school open houses/registration (Kindergarten Round-up, MS or HS info nights).
<input type="checkbox"/>	Have Awards/Recognition Committee announce winners (i.e. Golden Acorn, Outstanding Adv, Educator, etc.) in newsletter/eNews or social media. Also, make sure to report the winners in your next GM Meeting and record it in the GM Minutes (print copy of the minutes and a copy of the newsletter/eNews article announcing the winners for your SoE application). NOTE: Make sure to send the names of your award winners to council, so we can include them in the Council awards reception at the end of March. Names of winners kept confidential by council awards committee. Your awards/recognition committee should order the awards for your unit winners from the WSPTA website .
<input type="checkbox"/>	Give an example of how your PTA works with other organizations (ISF, VIS, etc.) Needed for SoE application
<input type="checkbox"/>	Elementary PTA's- Work with your Principal to have a PTA presence at Kindergarten Roundup night(s)- usually held in March.
<input type="checkbox"/>	Make sure your membership dues invoices are being paid to the WSPTA.
<input type="checkbox"/>	February 28 th – Deadline to send IRS Form 1099-MISC to IRS. (N/A if no Independent Contractors 1099-MISC issued)
<input checked="" type="checkbox"/>	March
<input type="checkbox"/>	March 1 st - Postmark deadline for the following WSPTA Applications and Awards: <ul style="list-style-type: none"> • Membership Award Applications- (100% Teacher, 100% Membership, Seedling, and Sapling) • Local PTA and Council Award Applications to WSPTA Office (Standards of Excellence, Outstanding Communications, Outstanding Newsletter& eBlast, Outstanding Website, Outstanding Local Unit of the Year). • PTA Men's Essay Contest Entries to WSPTA Office • Leadership Academy Award Applications to WSPTA Office
<input type="checkbox"/>	Appoint a Budget Committee to begin work on next year's budget- must be approved by membership by June.
<input type="checkbox"/>	At your next GM meeting, mention upcoming PTA training opportunities for members (i.e. PTA training and parent education classes at convention). Document in the GM minutes that you encouraged members to attend. You will also need to give a recap of Focus Day at the GM meeting and document the recap in the minutes. Make a copy of the GM minutes showing you did both of these for 2016-17 SoE app).
<input type="checkbox"/>	Gift Card Tree for Convention- If your local unit is able to donate a gift card for the Council's raffle basket at convention, please give it to the Council President by the April council meeting. The proceeds of the raffle will go to the WSPTA College Scholarship fund. Suggested gift card donation amount is \$20-\$25, but any amount is appreciated. Gift card donation typically falls under your budget line item for convention, but review your budget.
<input type="checkbox"/>	Plan to attend the March Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too!
<input type="checkbox"/>	Ensure the Treasurer gives a February 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 February.
<input type="checkbox"/>	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
<input type="checkbox"/>	Make sure your Nominating Committee is meeting and making progress in nominations for next year's officers.
<input type="checkbox"/>	Consult your Standing Rules to comply with the proper time to hold officer elections. Officers must be elected by June, but preferably prior to the WSPTA Convention (so they can attend convention and complete training).
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)

Acronyms

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GM= General Membership

EVP= Enrollment Verification Process

<input type="checkbox"/>	Start planning who will be able to attend the WSPTA Convention in May and serve as voting delegates for your PTA.
<input type="checkbox"/>	If Nominating Committee is ready, have them post the slate and elect officers at your GM meeting. (Print a copy of the Nominating Committee's signed and dated report for your next year's SoE app) Ensure officers are elected by membership in accordance with WSPTA's Bylaws, Article 5, Section 6 Make sure the names of the new officers are recorded in your GM minutes. (Print the minutes for next year's SOE application)
<input type="checkbox"/>	Plan to attend the Issaquah PTSA Council Awards and Recognition Event. (Tentatively scheduled 3/29 from 7-8:30pm)
<input type="checkbox"/>	March 30 th - Deadline for Platinum Membership Award (no application needed). Based on your uploaded membership count. To receive Platinum award, 20% increase over last year's total paid members.
<input checked="" type="checkbox"/>	April
<input type="checkbox"/>	Plan to attend the April Issaquah Council PTSA Council membership meeting (usually 2 nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too!
<input type="checkbox"/>	Ensure the Treasurer gives a March 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 March.
<input type="checkbox"/>	Register for WSPTA Convention (May 20-22 nd) in Yakima, WA (Print copy of all attendee's registrations- up to 4 people for maximum SoE application points). Encourage board/members to attend. Give a recap of Convention to members. For Platinum level section of SoE: Print example (i.e. minutes, newsletter, website, etc.) of how you shared Focus Day info with members. Can be in advance of event to encourage attendance or after event to report back.
<input type="checkbox"/>	Convention delegates- Each president must complete a delegate form and email it back to WSPTA. The email must be sent from the president's email address on file with WSPTA. Deadline is usually early April. 2016 form TBA.
<input type="checkbox"/>	Consult Standing Rules and make sure board, staff, and committee chairs are aware of deadlines for Expense Reimbursements.
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	Follow up with your Budget Committee regarding next year's budget. Budget must be approved by June.
<input type="checkbox"/>	Appoint a Year End Financial Review Committee or hire a CPA. (Review to be done after books are closed 6/30)
<input type="checkbox"/>	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 2016-17 SoE app- must provide at least 2 different examples with different recognition methods) For Platinum level section of 2016-17 SoE: up to 3 additional examples of methods recognizing volunteers
<input type="checkbox"/>	If Nominating Committee is ready, have them post the slate 10 days prior to your next GM meeting. Print a copy of the Nominating Committee's signed report. Elect next year's officers at your GM Meeting. Sample script for Election of Officers Make sure the names of the new officers are recorded in your GM minutes and print the minutes for next year's SOE application.
<input type="checkbox"/>	Make sure that you have a General Membership meeting scheduled to approve the next year's interim operating budget no later than early June. (You cannot conduct business over the summer without an approved budget!)
<input type="checkbox"/>	Encourage your PTA board to attend the ISF Nourish Every Mind Luncheon (April 28 th 11-1pm @ Iss Comm Ctr) or Breakfast (May 4 th 7-8:45am @ Eastridge Church). Partner with ISF Ambassador for your school. Contact ISF PTSA Liaison, Betsy Cohen , for help.
<input checked="" type="checkbox"/>	May
<input type="checkbox"/>	Confirm that Treasurer is working on Annual Corporate Renewal Report and Charitable Solicitations Act Registration to Secretary of State's Office. Must be RECEIVED by May 31st . Have Treasurer report this to board and/or members.
<input type="checkbox"/>	Ensure the Treasurer gives an April 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 April.

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<input type="checkbox"/>	Make certain that your WSPTA Convention delegates are registered and able to attend the Convention. (May 20-22) (Print copy of all attendee's registrations- up to 4 people for maximum 2016-17 SoE application points).
<input type="checkbox"/>	Send out an End of School Year Survey to your members (via eNews, website link, Facebook). Use this survey to gather feedback and help you plan/set your goals for next year. Print survey or the eNews article about survey, to show 1 of 2 methods your PTA uses to determine members' needs. (Needed for SoE application). Contact council webmaster, Cindy Kelm, for help with preparing your survey. Each unit pays dues to council to cover survey costs.
<input type="checkbox"/>	If Nominating Committee is ready, have them post the slate 10 days prior to your next GM meeting. Print a copy of the Nominating Committee's signed report. Elect next year's officers at your GM Meeting. Sample script for Election of Officers Make sure the names of the new officers are recorded in your GM minutes and print the minutes for next year's SOE application. *You can also approve next year's budget at the same GM meeting!
<input type="checkbox"/>	If you have already elected next year's officers, make sure that you have a General Membership meeting scheduled to approve the next year's interim operating budget no later than early June. (You cannot conduct business over the summer without an approved budget!)
<input type="checkbox"/>	At your next GM meeting, please have the treasurer report the names of the current officers who will be removed as signers on the PTA checking account as well as the names of the new signers effective 7/1. When you go to the bank to complete new signature cards, they will require a copy of the GM minutes with this information listed.
<input type="checkbox"/>	Consider planning a YE volunteer appreciation event or activity. (Print an example of how you recognized/thanked volunteers).
<input type="checkbox"/>	Be sure a Financial Review Committee has been appointed and date set for the YE review (must be done after 6/30). Review can be done by a CPA or a committee of no fewer than 3 PTA members who are non-signers on the bank account.
<input type="checkbox"/>	Plan to attend the Issaquah PTSA Council's PTA Presidents and Principals Luncheon (May 19 th 11-1pm @ Pickering Barn). Principals will be sent their own invite. Invite the incoming PTSA president to attend the luncheon with you. You will be asked to introduce your Principal and the incoming PTSA president during the luncheon. Bring a salad/side dish to share. Firm invite will be sent out by council with any additional details.
<input type="checkbox"/>	Ask delegates to give a report to the membership on the WSPTA Convention. (This can be done in GM, eNews, website) Print the report as an example of how you communicate WSPTA info to your members! Needed for 2016-17 SoE application.
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	Incoming President: Per WSPTA Bylaws, work to appoint board of director positions. Exec Committee then approves the appointments. Afterward, work as a board to appoint Ad-hoc and Committee Chairs.
<input type="checkbox"/>	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 2016-17 SoE app- must provide at least 2 different examples with different recognition methods) For Platinum level section of 2016-17 SoE: up to 3 additional examples of methods recognizing volunteers
<input type="checkbox"/>	Plan a transition meeting between existing board and the incoming PTSA President and board for next year. Sit down one on one with the incoming President to go over this checklist, the Standards of Affiliation, and any other pertinent information. Make sure board members and committee chairs are transitioning to their counterparts, too. Print a copy of your Officer/Committee chair Transition Plan. Need help with developing a written transition plan? Contact your Council VP for help. For Platinum level section of SoE: Provide written copy of BOTH officer transition plan and committee chair transition plan.
<input type="checkbox"/>	Incoming board should try to set a retreat date to start planning for next year. Do this before school ends and everyone scatters for the summer! Doodle.com is a great resource to help you find a date/time that works best for everyone. For Platinum level section of SoE: Provide copy of board retreat agenda, invite, or meeting minutes.
<input type="checkbox"/>	Meet with your Principal, Secretary, your board communications guru, etc. to come up with a preliminary calendar for the next year. Firm it up in late August and keep in touch with your Principal during the summer, if necessary.

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<input type="checkbox"/>	All school and district facility use requests for next year MUST to be sent (or hand delivered) to Cindy Schwinden at the district office no later than June 1st each year . If you aren't sure if you will need a specific room/facility, submit it anyway. Cindy tries to give preference to PTA's, but needs these forms. Cindy will allow you to fill out the facility use application once and attach a sheet with all the events (make sure dates, times, and which facilities/rooms are listed on the sheet, too!) Cindy can be reached at: schwindenc@issaquah.wednet.edu or by phone at (425)837-7127.
<input type="checkbox"/>	May 31st – Receipt Deadline for completed Annual Corporate Renewal Report and Charitable Solicitations Act Registration to Secretary of State's Office. Must be RECEIVED by this date. Can also be filed early.
<input checked="" type="checkbox"/>	June
<input type="checkbox"/>	Acknowledge all of your volunteers, Principal, committee chairs/board members. Print out at an example of how volunteers were appreciated. (2 examples needed for 2016-17 SoE app- must provide at least 2 different examples with different recognition methods) For Platinum level section of 2016-17 SoE: up to 3 additional examples of methods recognizing volunteers
<input type="checkbox"/>	Confirm that you have a membership approved interim Budget in place for the next year.
<input type="checkbox"/>	Confirm that you have a Fiscal YE Financial Review Committee in place and a date for the review is set. This can be done by a CPA or a committee of no fewer than 3 PTA members who are non-signers on the bank account.
<input type="checkbox"/>	Make certain that any final membership payments have been made.
<input type="checkbox"/>	Plan to attend the monthly Issaquah Council PTSA Council membership meetings (usually 2 nd Thursday each month). Training session will be provided after the meeting for incoming officers to help meet WSPTA training requirement.
<input type="checkbox"/>	Complete the Officer's List for all incoming 2016-17 elected officers and email it to WSPTA Office .
<input type="checkbox"/>	Submit a list of ALL incoming board of directors to the council secretary and webmaster. (Name, position, email, etc.) Include the names and emails for all board members, as well as for Reflections, Parent Ed, ISF, Advocacy/VIS, etc.
<input type="checkbox"/>	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 or National PTA websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples= 12 pts. Max SoE)
<input type="checkbox"/>	Make sure the Treasurer has communicated the deadline for all reimbursements to be submitted. This is needed so the Treasurer can prepare and close the books on 6/30/16 and transfer everything to the next Treasurer.
<input type="checkbox"/>	Ensure the incoming president is aware of the district's online Enrollment Verification Process (EVP). EVP typically takes place the 1 st week of August for elementary schools and the 2 nd week of August for Middle/High Schools. Make sure the PTA webmaster is aware of the EVP roll-out date (URL link provided to district) and your PTA website is ready to sign up members for the next school year. This is a GREAT way to have parents visit your website and pay for annual membership, PTA donations, etc.
<input type="checkbox"/>	Make sure the incoming treasurer knows a financial report must be provided during the summer months. Each month's report may reflect not much happening, but you have to document financial reports were given to the board during those months, too!
<input type="checkbox"/>	Incoming President/Board: Review WSPTA Bylaws to refresh and become familiar with Bylaw requirements (i.e. Training, etc.)
<input type="checkbox"/>	Ensure incoming Treasurer sets up time for new signature cards to be completed at the bank for all signers. The treasurer should maintain a copy of the signature cards from the bank for your records.
<input type="checkbox"/>	Give yourself a much deserved pat on the back- you survived the year!