

PTA 2016-17 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, rather 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 2016-17 Uniform Bylaws . Plan to update your Bylaws at your 1st GM mtg., if necessary. A summary of Bylaws changes effective in 2015 can be found here .
<input type="checkbox"/>	Ensure the Treasurer gives monthly financial reports to the Board 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 Board 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 application (SoE app).
<input type="checkbox"/>	Confirm the person to whom the Treasurer will give the unopened monthly bank statements. (This person must be a PTA member who is a non-signer on the bank account.) This person is responsible for opening, reviewing, and signing off on each month's bank statement. WSPTA Non-signer Review of Bank Statement Form . S/he 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). For SoE Platinum Level: Document the process you used to develop your SMART goals (i.e., explain why goals were chosen), the process you will use to evaluate your progress toward meeting goals, and how you'll know when they are met.
<input type="checkbox"/>	Identify at least two different ways your PTA determines 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 SoE Platinum Level: Provide up to three additional methods used to determine members' needs.
<input type="checkbox"/>	Establish your Communications plan for the year (eNews/FB/website/etc.).
<input type="checkbox"/>	Review 2016-17 interim budget approved in late Spring. Make any desired changes and approve at 1st GM mtg.
<input type="checkbox"/>	Set PTA Board and GM meeting dates for the year. Post BOTH in more than one public place for membership to see (i.e., directory, website, school bulletin board, etc.). For SoE app: Print a copy or screen shot showing how you publicized both of these to your members.
<input type="checkbox"/>	Review the WSPTA's 2016 Standing Rules Handbook and compare to your PTA's Standing Rules. Plan to update your Standing Rules at 1st GM mtg., if necessary.
<input type="checkbox"/>	Do your Standing Rules list the individual awards (i.e., Golden Acorn, Outstanding Advocate, Educator, etc.) your PTA offers each year? For SoE app: Print and highlight portion of your Standing Rules reflecting awards offered.
<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 plan for the entire year. Work with the district to be included in early August's EVP process.
<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, usually held in mid/late August. Attend other trainings advertised and offered by Issaquah PTSA Council/Region. Collect copies of all attendees' certificates or registrations and record your elected officers' training on the WSPTA's Training Tracking Sheet . For SoE app: 1 pt. per attendee, max 6 pts., for regional and leadership conferences, webinars, WSPTA-approved Council and regional trainings)
<input type="checkbox"/>	Update your PTA's Legal Documents Notebook(s). Standing Rules should indicate the officer(s) responsible to maintain. Label records with destruction date or permanently kept. See WSPTA Record Retention Timetable . Regularly dispose of documents when their retention periods have expired.

<input type="checkbox"/>	Send the Council webmaster, Cindy Kelm , a list of your Board and General Membership meeting dates for the year.
<input type="checkbox"/>	Ensure your 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 mtg. minutes are approved at GM meetings. Board mtg. minutes are approved at Board mtgs. Both should be publicly available to members).
<input checked="" type="checkbox"/>	September
<input type="checkbox"/>	Review WSPTA 2016-17 SOA Contract to ensure all requirements will be met by 10/31/16 postmark deadline.
<input type="checkbox"/>	Ensure the Treasurer gives July and August financial reports to the Board and/or membership. The report should include that PayPal and bank statements were opened/reviewed and signed by a non-signer on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during the months of July and August. For SoE app: Print a copy of the July and August financial reports.
<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, Leslie Kahler, by the Oct. Council GM mtg.
<input type="checkbox"/>	Sign up for PTA & the Law training , if still needed. At least one 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 2015-16 (July 2015/June 2016) 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) • 2016-17 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 2016-17 approval 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 (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 pts. max SoE)
<input type="checkbox"/>	Fall Membership Campaign - 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 receive 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 and make sure your chair is trained. 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 PT Avenue membership count. To receive Bronze award, 50% of last year's members enrolled.

Acronyms

SoE= Standards of Excellence

GM= General Membership

EVP= Enrollment Verification Process

<input type="checkbox"/>	Hold a chair and volunteer orientation/training meeting. Make sure Chairs/volunteers: <ul style="list-style-type: none"> • Are current PTA members (dues paid) • Have 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 Expense Reimbursement Request). Need a sample Program Planning or Post Event Program Evaluation form? Contact your Council VP for help. For SoE Platinum Level: Provide written description of committee chair training.
<input type="checkbox"/>	Identify three Programs/Activities designed to address your PTSA/PTA's goals for the year. For SoE app: Print example of each activity and indicate which goal it addresses. For SoE Platinum Level: include program eval forms for the three programs.
<input type="checkbox"/>	For SoE app: Print a copy of one completed Post Event Program Evaluation form. Don't have this? Contact Council VP for help.
October	
<input type="checkbox"/>	Confirm at least one elected officer has attended or currently is registered for PTA & the Law training . (Print copy of all attendees' certificates- up to 4 people for maximum SoE app points).
<input type="checkbox"/>	Ensure the Treasurer gives a September financial report to the Board and/or membership. The report should include that PayPal and bank statements were opened/reviewed and signed by a non-signer on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer also should report whether there were claims/no claims filed against your PTA's insurance during September. For SoE app: Print September financials.
<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 (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 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, Erin Eaton .
<input type="checkbox"/>	Register for WSPTA Legislative Assembly (Oct. 21st-22nd). Details on WSPTA website . Encourage Board/members to attend. Give a recap of Leg. Assembly to members. For SoE app: Print copy of all attendees' registrations - up to 3 people for maximum SoE app points). For SoE Platinum Level: Print example of how you shared info with members (e.g., 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. For SoE app: Print at least two examples (with different recognition methods) of how volunteers were appreciated. For SoE Platinum Level: Add up to three additional examples of different methods of recognizing volunteers.
<input type="checkbox"/>	Consider making your budgeted donations (VIS, Issaquah Schools Foundation, etc.) now for the year.
<input type="checkbox"/>	Confirm your PTA's Annual Corporate Renewal date (due annually by last day of month PTA was incorporated). For SoE app: Obtain copy of current FY renewal if incorporation date between July 1-Feb 28, or the prior FY renewal if incorporation date between 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). For SoE app: Print examples of two different methods of communication you regularly use with members. For SoE Platinum Level: provide up to three additional examples of different methods of communication.
<input type="checkbox"/>	For SoE app: Identify three different ways your PTA advocates for or addresses needs of children in local community, district, region, state or nation. (Each example is worth 2 pts for your SoE application). For SoE Platinum Level: Identify up to two more examples of how your PTA advocates or addresses needs.

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<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 SoE app: copy of training tracking sheet is needed, too.
<input type="checkbox"/>	For SoE Platinum Level: Share at least two articles from two different issues of the National PTA's 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 SoE Platinum Level: Include up to two 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 SoE Platinum Level: Provide up to two examples or a narrative of a program/event/committee/outreach to one of your diverse populations.
<input type="checkbox"/>	Oct. 31st – Postmarked deadline for WSPTA 2016-17 SOA Contract to WSPTA Office. (Keep a copy for records and SoE app.)
<input type="checkbox"/>	For SoE Platinum Level: 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.
<input checked="" type="checkbox"/>	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"/>	For SoE app: Ask the Treasurer to obtain a current fiscal year Certificate of Insurance. If Treasurer doesn't have one, s/he can call AIM and request one be emailed.
<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, Erin Eaton .
<input type="checkbox"/>	Recognize volunteers on a regular basis. Thank them for their work. Print out at an example of how volunteers were appreciated. For SoE app: Print at least two examples (with different recognition methods) of how volunteers were appreciated. For SoE Platinum Level: Add up to three additional examples of different methods of 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 on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during October. For SoE app: Print October financials.
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 pts. max SoE)
<input type="checkbox"/>	Begin asking for volunteers to serve on your PTA's Nominating Committee.
<input type="checkbox"/>	For SoE app: Print a copy of your 2016-17 budget and highlight the line item budgeted for 2017 Convention attendance.
<input type="checkbox"/>	Start promoting the WSPTA's "Men Making A Difference" student essay contest. This is a great opportunity for students to write essays about an important male role model. 2016-17 Essay Entry must be postmarked by 3/1/17. For SoE app: Print example of how you promoted the contest to your members (e.g., eNews/FB/website/etc.).
<input type="checkbox"/>	At your next GM meeting, make sure to report on the completed 2016 Standards of Affiliation (SOA). Document report to membership in GM minutes. For SoE Platinum Level: obtain copy of minutes showing SOA discussed.

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<input type="checkbox"/>	Ensure that a fiscal year 2015-16 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. For SoE app: Make copy of filing or IRS acceptance letter. For SoE Platinum Level: Obtain copy of GM minutes showing report to members of 2015-16 tax filing or IRS acceptance letter.
<input type="checkbox"/>	For SoE app: Obtain a copy of the fiscal year 2015-16 charitable solicitations renewal (or acceptance letter). If no charitable solicitations renewal 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 SoE Platinum Level: Print example of how you shared info with members (e.g., 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. Review Article 5, Section 5 of the WSPTA 2016-17 Uniform Bylaws regarding election procedures. For SoE app: Make copy of GM minutes showing election of Nominating Committee.
<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. 21st (10am-noon at Issaquah Library Mtg Room). For SoE Platinum Level: Copy of your PTA's Reflections participation form, copy of an advertisement to members about Reflections program, and an example of Student Artist Recognition.

 **December**

<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 on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during November. For SoE app: Print November financials.
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 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. For SoE app: Print at least two examples (with different recognition methods) of how volunteers were appreciated. For SoE Platinum Level: Add up to three additional examples of different methods of 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"/>	Promote Focus Day (scheduled for Monday, Jan. 16, 2017) and encourage Board/members to attend. For SoE app: Print copy of all attendees' registrations - up to 3 people for maximum SoE app points). For SoE Platinum Level: Print example of how you shared Focus Day info with members (e.g., minutes, newsletter, website, etc.)
<input type="checkbox"/>	For SoE Platinum Level: If not already done, share at least two articles from two different issues of the National PTA's magazine Our Children . Attach up to 2 examples of how your PTA shared the information.

 **January**

<input type="checkbox"/>	Attend Focus Day (scheduled for Monday, January 16th). Give a recap to membership and record in meeting minutes. For SoE app: Print copy of all attendees' registrations - up to 3 people for maximum SoE app points). For SoE Platinum Level: Print example of how you shared Focus Day info with members (e.g., minutes, newsletter, website, etc.)
<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 for 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.).

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<input type="checkbox"/>	If not already done, identify at least two different ways your PTA determines 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 SoE Platinum Level: Provide up to three additional methods used to determine 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, Erin Eaton .
<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"/>	If you haven't already done so, elect your Nominating Committee at your January GM Meeting. Review Article 5, Section 5 of the WSPTA 2016-17 Uniform Bylaws regarding election procedures. For SoE app: Make copy of GM minutes showing election of Nominating Committee.
<input type="checkbox"/>	Ensure the Treasurer gives a December financial report to the Board and/or membership. The report should include that PayPal and bank statements were opened/reviewed and signed by a non-signer on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during December. For SoE app: Print copy of December financials.
<input type="checkbox"/>	It's recommended to conduct a Mid-Year Financial Review covering the months of July 2016-January 2017). Have the review committee give a report at next GM meeting and document in minutes. For SoE app: Make a copy of the 2015-2016 YE Review. For SoE Platinum Level: Also make copy of the mid-year financial review for the prior year (months July 2015-January 2016). Include copy of GM minutes showing mid-year financial review results for prior year 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. For SoE app: Print at least two examples (with different recognition methods) of how volunteers were appreciated. For SoE Platinum Level: Add up to three additional examples of different methods of recognizing volunteers.
<input type="checkbox"/>	Try to attend and promote the Issaquah PTSA Council's Reflections Reception at IHS on January 10 th (6:30-8pm)
<input type="checkbox"/>	If not already done, start promoting the WSPTA's "Men Making A Difference" student essay contest. 2016-17 Essay Entry must be postmarked by 3/1/17. For SoE app: Print example of how you promoted the contest to your members (e.g., eNews/FB/website/etc.).
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 pts. max SoE)
<input type="checkbox"/>	If not already done, appoint an individual Awards/Recognition committee. The committee should start soliciting award submissions (i.e., Acorn, Outstanding Advocate, Educator, etc.) Plan to have winners announced before March 1st 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). • If not already done, elect your Nominating Committee. (Make copy of GM minutes showing election of Nominating Committee.) • If not already done, Report on Legislative Assembly. • Explain what Focus Day is and encourage PTA General Membership to attend on January 16th. • 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 for SoE app.)
<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 3/1/17!!
<input type="checkbox"/>	January 25th – Gold Membership Award deadline (no application needed). Based on your uploaded PT Avenue membership count. To receive Gold award, 10% increase over last year's total paid members enrolled.

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<input type="checkbox"/>	<p>January 31st- Treasurer's Deadline for:</p> <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"/>	<p>Plan to attend the February 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!</p>
<input type="checkbox"/>	<p>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 on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during January. For SoE: Print January financials.</p>
<input type="checkbox"/>	<p>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.</p>
<input type="checkbox"/>	<p>Prepare final pieces of info for your WSPTA Awards applications. All applications WSPTA website. Deadline 3/1!</p> <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). • Leadership Academy applications
<input type="checkbox"/>	<p>PTA Men's Essay Contest entries due to WSPTA Office by 3/1/17.</p>
<input type="checkbox"/>	<p>Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 pts. max SoE)</p>
<input type="checkbox"/>	<p>Consider attending the Region 2 Mid-Winter Conference - <i>Have all your PTA elected officers attended a qualified required WSPTA training?</i> Collect copies of all attendees' certificates or registrations. For SoE app: 1 pt. per attendee, max 6 pts., for regional and leadership conferences, webinars, WSPTA-approved Council and regional trainings)</p>
<input type="checkbox"/>	<p>Think about your PTA's presence at school open houses/registration (Kindergarten Round-Up, MS or HS info nights).</p>
<input type="checkbox"/>	<p>Individual award winners (i.e., Golden Acorn, Outstanding Advocate, Educator, etc.) selected and announced in newsletter/eNews and social media. Your Awards/Recognition committee should order the certificates and pins/plaques for your winners from the WSPTA Store. NOTE: Make sure to send the names of your award winners to Council, so we can include them in the Council awards reception in April. Names of winners kept confidential by Council awards committee. Also, make sure to report the winners at your next GM mtg. and record it in the GM mtg. minutes. For SoE: Print copy of the minutes and a copy of the newsletter/eNews article announcing the winners.</p>
<input type="checkbox"/>	<p>For SoE app: Give an example of how your PTA works with other organizations (ISF, VIS, etc.)</p>
<input type="checkbox"/>	<p>Make sure your membership dues invoices are being paid to the WSPTA.</p>
<input type="checkbox"/>	<p>February 28th - Treasurer's Deadline for:</p> <ul style="list-style-type: none"> • IRS Form 1099-MISC to IRS. (N/A if no Independent Contractors 1099-MISC issued)
<input checked="" type="checkbox"/> March	
<input type="checkbox"/>	<p>Plan to attend the March 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!</p>

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SoE= Standards of Excellence

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<input type="checkbox"/>	<p>March 1st- Postmark deadline for the following WSPTA Applications and Awards:</p> <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"/>	<p>Appoint a Budget Committee to begin work on next year’s budget- must be approved by membership by June.</p>
<input type="checkbox"/>	<p>At your next GM mtg., mention upcoming PTA training opportunities for members (e.g., PTA training and parent education classes at Convention). Document in the GM mtg. minutes that you encouraged members to attend. If not already done, give a recap of Focus Day at the GM mtg. and document the recap in the minutes. For SoE app: Make a copy of the GM minutes showing you did both.</p>
<input type="checkbox"/>	<p>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.</p>
<input type="checkbox"/>	<p>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 on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA’s insurance during February.</p>
<input type="checkbox"/>	<p>Recognize volunteers on a regular basis. Thank them for their work. Print out at an example of how volunteers were appreciated. For SoE app: Print at least two examples (with different recognition methods) of how volunteers were appreciated. For SoE Platinum Level: Add up to three additional examples of different methods of recognizing volunteers.</p>
<input type="checkbox"/>	<p>Make sure your Nominating Committee is meeting and making progress on nominations for next year’s officers.</p>
<input type="checkbox"/>	<p>Promote the WSPTA Annual Convention (scheduled for April 28-30th at Hilton SeaTac) and encourage Board/members to attend. Discuss Convention with membership – this can be in advance of event to encourage attendance or after event to report back. For SoE app: Print copy of all attendees’ registrations - up to 4 people for maximum 2017-18 SoE app points). For SoE Platinum Level: Print example of how you shared Convention info with members (e.g., minutes, newsletter, website, etc.)</p>
<input type="checkbox"/>	<p>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).</p>
<input type="checkbox"/>	<p>Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 pts. max SoE)</p>
<input type="checkbox"/>	<p>Start planning who will attend the WSPTA Convention in April and serve as voting delegates for your PTA.</p>
<input type="checkbox"/>	<p>If Nominating Committee is ready, have them post the slate at least 15 days prior to your next GM meeting and elect officers at that meeting. Officers must be elected by membership in accordance with WSPTA’s Bylaws, Article 5, Section 6. Election Procedure Resource Document Make sure the names of the new officers are recorded in your GM mtg. minutes. For SoE app: Print a copy of the Nominating Committee’s signed and dated report and the minutes for next year’s application.</p>
<input type="checkbox"/>	<p>March 30th – Platinum Membership Award deadline (no application needed). Based on your uploaded PT Avenue membership count. To receive Platinum award, 20% increase over last year’s total paid members enrolled.</p>
<input checked="" type="checkbox"/>	<p>April</p>
<input type="checkbox"/>	<p>Plan to attend the April 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!</p>
<input type="checkbox"/>	<p>Plan to attend the Issaquah PTSA Council Awards and Recognition Event (tentatively scheduled April 4th from 7-8:30pm.)</p>

Acronyms

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<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 on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance
<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. 2017 form TBA.
<input type="checkbox"/>	Make certain that your WSPTA Convention delegates are registered and able to attend the Convention (April 28-30th). For SoE app: Print copy of all attendee's registrations - up to 4 people for maximum 2017-18 SoE app points. For SoE Platinum Level: Print example of how you shared Convention info with members (e.g., minutes, newsletter, website, etc.)
<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 (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 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 June 30 th .)
<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"/>	If Nominating Committee is ready, have them post the slate at least 15 days prior to your next GM meeting and elect officers at that meeting. Officers must be elected by membership in accordance with WSPTA's Bylaws, Article 5, Section 6. Election Procedure Resource Document Make sure the names of the new officers are recorded in your GM mtg. minutes. For SoE app: Print a copy of the Nominating Committee's signed and dated report and the minutes for next year's 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 checked="" type="checkbox"/>	May
<input type="checkbox"/>	Plan to attend the Issaquah PTSA Council's PTA Presidents and Principals Luncheon (May 18 th 11-1pm @ Pickering Barn). Principals will be sent their own invite. Invite your 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. Evite will be sent out by Council with any additional details.
<input type="checkbox"/>	Confirm that Treasurer is working on Charitable Solicitations Act Registration/Annual Renewal. Must be RECEIVED by Secretary of State's Office by May 31 st . 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 on the account. WSPTA Non-signer Review of Bank Statement Form The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during April.
<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. Contact council webmaster, Cindy Kelm , for help with preparing your survey. Each unit pays dues to Council to cover survey costs. For SoE app: Print survey or the eNews article about survey, to show 1 of 2 methods your PTA uses to determine members' needs.
<input type="checkbox"/>	If not already done, have Nominating Committee post the slate at least 15 days prior to your next GM meeting* and elect officers at that meeting. Officers must be elected by membership in accordance with WSPTA's Bylaws, Article 5, Section 6. Election Procedure Resource Document Make sure the names of the new officers are recorded in your GM mtg. minutes. For SoE app: Print a copy of the Nominating Committee's signed and dated report and the minutes for next year's application *You can also approve next year's budget at the same GM meeting!

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<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, the Treasurer should 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 mtg. minutes with this information listed.
<input type="checkbox"/>	Consider planning a YE volunteer appreciation event or activity. For SoE app: 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 three PTA members who are non-signers on the bank account.
<input type="checkbox"/>	Encourage your PTA board to attend the ISF Nourish Every Mind Luncheon (May 11 th 11-1pm @ Meydenbauer Ctr) or Breakfast (May 17 th 7-8:45am @ Eastridge Church). Partner with ISF Ambassador for your school. Contact ISF PTSA Liaison, Valerie Yanni, for help.
<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 (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 pts. max SoE)
<input type="checkbox"/>	Incoming President: Per WSPTA Bylaws, work to appoint Director positions. Exec Committee then approves the appointments. Afterward, work as a Board to appoint Ad-hoc and Committee Chairs.
<input type="checkbox"/>	Plan a transition meeting between current 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 with 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 SoE Platinum Level: 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 SoE Platinum Level: 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.
<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 PTAs, but needs these forms. 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 Charitable Solicitations Act Registration/Annual Renewal to Secretary of State's Office. Must be RECEIVED by this date. Can also be filed early.

June

<input type="checkbox"/>	Acknowledge all of your volunteers, Principal, committee chairs/Board members. Print out at an example of how volunteers were appreciated. For SoE: Must provide at least two examples of different recognition methods for 2017-2018 SoE app. For SoE Platinum Level: Add up to up to three additional examples of how volunteers were recognized.
<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 three PTA members who are non-signers on the bank account.
<input type="checkbox"/>	Make certain that any final membership payments have been made.

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<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 List of Officers identifying the incoming 2017-18 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 (at GM meeting, in eNews, on Facebook, etc.). Print examples for each using two 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 = 8 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 6/30/17 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 (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!