

## PTA 2017-18 Checklist

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



### July and August

The following checklist is a guideline to help you navigate the upcoming year.  
There are additional resources on the [Council website](#), [WSPTA website](#), and the [National PTA](#) website  
Good Luck and Have a Great Year!

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Ensure June Treasurer's Report is completed and emailed to the Board in July   |
| <input type="checkbox"/> | Ensure the Annual Financial Report (July 1, 2016 – June 30, 2017) is completed and emailed to the Board in July.   |
| <input type="checkbox"/> | Ensure the Financial Review Committee or CPA conducts a Year End Review and emails the report to the board prior to conducting new business.   |
| <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"/> | Ensure the July Treasurer's Report is completed and emailed to the board in August. June and July financial report should be presented at a Board/Membership 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"/> | Hold an annual Retreat. Meet with your Board of Directors to firm up plans for the new school year. (Do this earlier, rather than later, if possible). <a href="#">Doodle.com</a> is a great (free) resource to help you find a date/time that works best for everyone.  |
| <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"/> | If not already done, review WSPTA 2017-18 Uniform Bylaws and review the WSPTA's 2017 Standing Rules Handbook and compare to your PTA's Standing Rules. Plan to approve your Standing Rules at 1st Membership mtg. of the year.   |
| <input type="checkbox"/> | Have Board members review and sign Code of Conduct and Conflict of Interest forms. Contact Council for examples.   |
| <input type="checkbox"/> | Establish your Communications plan for the year (e-News/FB/website/Peachjar).  |
| <input type="checkbox"/> | Set PTA Board <u>and</u> Membership 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"/> | 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"/> | 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. A WSPTA Non-Signer Review of Bank Statement Form is available under Treasurer/Board Finance Resources on the Leadership Guides page under <a href="#">PTA Leaders</a> on the WSPTA website. 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. (user name: growing password: together) |
| <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"/> | 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"/>	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 2. Collect copies of all attendees' certificates or registrations and record your elected officers' training on the WSPTA's Training Tracking Sheet. The spreadsheet can be located on the <a href="#">Leadership page</a> on the WSPTA's website under Governance. (User name: growing Password: together) For SoE app: 1 pt. per attendee, max 6 pts., for regional and leadership conferences, webinars, WSPTA-approved Council and regional trainings. All elected officers must attend one training this school year.
<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"/>	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. (Membership mtg. minutes are approved at Membership meetings. Board mtg. minutes are approved at Board mtgs.
<b>✓ September</b>	
<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).
<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. A WSPTA Non-Signer Review of Bank Statement Form is available. 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 <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2nd Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<input type="checkbox"/>	Provide your <a href="#">council voting delegate form</a> to Issaquah PTSA Council Secretary, by the Oct. Council GM mtg.
<input type="checkbox"/>	Sign up for <a href="#">PTA &amp; the Law training</a> , 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).
<input type="checkbox"/>	Make sure names and contact information 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 Membership meeting of the year (either in September or early October). Make sure to do the following at your first Membership meeting and record the information in your minutes: <ul style="list-style-type: none"> <li>• Financial Review Report for fiscal year 2016-17 (July 2016/June 2017) provided to members (print copies of BOTH the Financial Review report as well as a copy of Membership minutes showing YE review results reported to members - needed for your SoE app)</li> <li>• Monthly financial reports for July/August presented and filed for review (print copy of reports for SoE app)</li> <li>• 2017-18 Budget approval by membership (print copies of BOTH the budget and minutes approving budget for SoE app)</li> <li>• Mission and Goals approval by membership (print copies of BOTH goals and minutes approving goals for your SoE app)</li> <li>• Standing Rules for 2017-18 approval by membership (print copies of BOTH SR's and minutes approving SR's for SoE app)</li> <li>• Provide Membership report to your membership</li> <li>• Membership Minutes from your prior meeting are presented and corrected/Filed (Note: Membership minutes are approved at Membership meetings. Board minutes are approved at board meetings).</li> </ul>
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples = 8 pts. max SoE)

## Acronyms

SoE= Standards of Excellence

EVP= Enrollment Verification Process

<input type="checkbox"/>	Fall Membership Campaign - Work towards 100% Staff Membership and General Membership <ul style="list-style-type: none"> <li>• Invite prior members to rejoin the PTA. Promote on Facebook, in e-News, and e-Blasts.</li> <li>• Work with Principal and ensure all Teachers/Staff receive a PTA membership form and encourage them to join.</li> <li>• Invite members of the community and school board members to join your PTA.</li> </ul>
<input type="checkbox"/>	Start promoting PTA Reflections Program and make sure your chair is trained. Council will provide a training this month on September 20 <sup>th</sup> from 10:30-12:30 at the KCLS Service Center. Contact email: <a href="mailto:reflections@issaquahptsa.org">reflections@issaquahptsa.org</a>
<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.
<input type="checkbox"/>	Hold a chair and volunteer orientation/training meeting. Make sure Chairs/volunteers: <ul style="list-style-type: none"> <li>• Are current PTA members (dues paid)</li> <li>• Have completed the district background requirements for volunteers</li> <li>• 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).</li> </ul> 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.
<input checked="" type="checkbox"/>	<b>October</b>
<input type="checkbox"/>	Confirm at least one elected officer has attended or currently is registered for <a href="#">PTA &amp; the Law training</a> . Also, confirm all elected officers have attended one training this year. (Print copy of all attendees' certificates- up to 4 people for maximum SoE app points). 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"/>	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. A WSPTA Non-Signer Review of Bank Statement Form is available. 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 <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2 <sup>nd</sup> Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! <b>Council Fees are due on October 31.</b> Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<input type="checkbox"/>	Review Standards of Affiliation (SOA) Agreement. Keep Agreement available so you do not miss any State or Federal government deadlines. If you do not have a copy of the SOA contact your Council VP or visit the WSPTA website – <a href="#">Leadership page</a> .
<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"/>	Encourage your membership to take the WSPTA Legislative Survey. This will provide guidance for your Legislative Assembly Voting Delegates.
<input type="checkbox"/>	Register for WSPTA Legislative Assembly (Oct. 21st-22nd). Details on <a href="#">WSPTA website</a> . Encourage Board/members to attend. Appoint Voting Delegates according to your Standing Rules. Send in the names of your Delegates to WSPTA by the deadline. 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"/>	Consider making your budgeted donations (Issaquah Schools Foundation, Volunteers for Issaquah Schools, Academy for Community Transition, Echo Glen, etc.) at this time.
<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"/>	Make sure that membership is uploaded via PT Avenue and invoices are being paid to the WSPTA. The Silver level is awarded to PTAs/PTSAs with a 5% increase over the previous year's paid membership.
<input type="checkbox"/>	Continue to promote Reflections.
<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"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples = 8 pts. max SoE)
<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.
<input type="checkbox"/>	For SoE Platinum Level: Share at least two articles from two different issues of the National PTA's magazine <a href="#">Our Children</a> . Attach up to 2 examples of how your PTA shared the information.
<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"/>	For SoE Platinum Level: Share at least two articles from two different issues of the National PTA's magazine <a href="#">Our Children</a> . Attach up to 2 examples of how your PTA shared the information
<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.
<b>November</b>	
<input type="checkbox"/>	Ensure your PTA's insurance has been renewed and <b>paid by November 10<sup>th</sup> to AIM Insurance</b> . Treasurer should report the renewal to the Board and/or membership. Record in minutes.
<input type="checkbox"/>	For SoE app: Obtain a current fiscal year Certificate of Insurance from the Treasurer. Provide a Certificate of Insurance to the ISD Facilities Coordinator. Certificate must name ISD as additionally insured.
<input type="checkbox"/>	Ensure that a fiscal year 2016-17 Tax Return (990/990EZ/990-N) e-postcard is filed with the IRS <b>no later than November 15<sup>th</sup></b> . 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 2016-17 tax filing or IRS acceptance letter.
<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. A WSPTA Non-Signer Review of Bank Statement Form is available. 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"/>	Plan to attend the November <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2 <sup>nd</sup> Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<input type="checkbox"/>	Begin asking for volunteers to serve on your PTA's Nominating Committee.
<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"/>	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
<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"/>	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"/>	Report on the completed 2017 Standards of Affiliation (SOA). Document report to membership in GM minutes. For SoE Platinum Level: obtain copy of minutes showing SOA discussed.
<input type="checkbox"/>	Your Reflections participants advancing to the next level of Judging should be selected and recognized. Their Reflection submissions should then be turned in to the Council Reflections Chair, on Nov. 20th (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.
<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. <a href="#">2017-18 Essay Entry</a> must be postmarked by 3/1/18. For SoE app: Print example of how you promoted the contest to your members (e.g., e-News/FB/website/etc.).
<input type="checkbox"/>	For SoE app: Obtain a copy of the fiscal year 2016-17 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"/>	For SoE app: Print a copy of your 2017-18 budget and highlight the line item budgeted for 2018 Convention attendance.
<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 Membership Meeting. Review Article 5, Section 5 of the WSPTA 2016-17 Uniform Bylaws regarding election procedures. For SoE app: Make copy of minutes showing election of Nominating Committee.
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples = 8 pts. max SoE)
<input checked="" type="checkbox"/> <b>December</b>	
<input type="checkbox"/>	No Issaquah PTSA Council Meeting Scheduled this month! Have a wonderful Holiday Season.
<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 Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> 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"/>	Silver Membership Award (no deadline & no application needed). Based on your uploaded PT Avenue membership count. To receive Gold award, 5% increase over last year's total paid members enrolled
<input type="checkbox"/>	Promote Focus Day (Date should be scheduled by now) 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 <a href="#">Our Children</a> . Attach up to 2 examples of how your PTA shared the information.
<input checked="" type="checkbox"/>	<b>January</b>
<input type="checkbox"/>	Try to attend and promote the Issaquah PTSA Council's Reflections Reception at IHS on January 9 <sup>th</sup> (6:30-8pm)
<input type="checkbox"/>	Attend <a href="#">Focus Day</a> . 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, Membership open forum, etc.).
<input type="checkbox"/>	If you haven't already done so, elect your Nominating Committee at your January Membership Meeting. Review Article 5, Section 5 of the WSPTA 2016-17 Uniform Bylaws regarding election procedures. For SoE app: Make copy of Membership minutes showing election of Nominating Committee.
<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.
<input type="checkbox"/>	Plan to attend the January <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2 <sup>nd</sup> Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<input type="checkbox"/>	It's recommended to conduct a Mid-Year Financial Review covering the months of July 2017-January 2018. Have the review committee give a report at next Membership meeting and document in minutes. For SoE app: Make a copy of the 2016-2017 YE Review. For SoE Platinum Level: Also make copy of the mid-year financial review for the prior year (months July 2016-January 2017). Include copy of Membership minutes showing mid-year financial review results for prior year were reported.
<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. A WSPTA Non-Signer Review of Bank Statement Form is available. 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"/>	For your January Membership Meeting, make sure to do the following and <u>include the information in your minutes</u> : <ul style="list-style-type: none"> <li>• Mid-year Financial Review Report given, if one was done (print a copy for SoE submission).</li> <li>• If not already done, elect your Nominating Committee. (Make copy of GM minutes showing election of Nominating Committee.)</li> <li>• If not already done, Report on Legislative Assembly.</li> <li>• Explain what Focus Day is and encourage PTA Membership to attend.</li> <li>• Provide Membership report to your membership. Keep working toward 100% Staff and 100% General Membership.</li> <li>• Express appreciation to your volunteers up to this point (print out copy of minutes showing this was done for SoE app.)</li> </ul>
<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. A Nominating Committee & Elections handbook can be found on the WSPTA Leadership Guides page under Leader Resources. Login: growing Password: together
<input type="checkbox"/>	January 31 <sup>st</sup> - Treasurer's Deadline for: <ul style="list-style-type: none"> <li>• IRS Form 1099-MISC to any Independent Contractor(s) used.</li> <li>• Sales Tax Form Due to WA State Dept. of Revenue</li> <li>• Reseller's Permit (verify renewal date if your unit has one)</li> </ul>

**Acronyms**  
**SoE**= Standards of Excellence  
**EVP**= Enrollment Verification Process

<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 awardees announced during your March Membership meeting so they can be recognized in time to attend the District Level Reception hosted by Council.
<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"/>	If not already done, start promoting the WSPTA's Men Making A Difference" student essay contest. <a href="#">2017-18 Essay Entry</a> must be postmarked by 3/1/18. For SoE app: Print example of how you promoted the contest to your members (e.g., e-News/FB/website/etc.).
<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"/>	Gold Membership Award (no 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.
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples = 8 pts. max SoE)
<input checked="" type="checkbox"/> <b>February</b>	
<input type="checkbox"/>	Plan to attend the February <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2 <sup>nd</sup> Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<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 on the account. A WSPTA Non-Signer Review of Bank Statement Form is available. The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during January. For SoE: Print January financials.
<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. <a href="#">All applications WSPTA website</a> . <b>Deadline 3/1!</b> <ul style="list-style-type: none"> <li>• Membership Award Applications (100% Teacher, 100% Membership) - copy apps for SoE Platinum Level.</li> <li>• Local PTA and Council Award Applications to WSPTA Office (Standards of Excellence, Outstanding Communications, Outstanding Newsletter&amp; e-Blast, Outstanding Website, Outstanding Local Unit of the Year).</li> <li>• Leadership Academy applications</li> </ul>
<input type="checkbox"/>	PTA Men's Essay Contest entries due to WSPTA Office by 3/1/17.
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples = 8 pts. max SoE)
<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> 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)
<input type="checkbox"/>	Think about your PTA's presence at school open houses/registration (Kindergarten Round-Up, MS or HS info nights).

**Acronyms**

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<input type="checkbox"/>	Individual award recipients (i.e., Golden Acorn, Outstanding Advocate, Educator, etc.) selected and announced in newsletter/e-News and social media. Your Awards/Recognition committee should order the certificates and pins/plaques for your awardees from the <a href="#">WSPTA Store</a> . NOTE: Make sure to send the names of your awardees to Council, so we can include them in the Council awards reception in April. Names will be kept confidential by Council awards committee. Also, make sure to report the award recipients at your next Membership mtg. and record it in the meeting minutes. For SoE: Print copy of the minutes and a copy of the newsletter/e-News article announcing your award recipients.
<input type="checkbox"/>	For SoE app: Give an example of how your PTA works with other organizations (ISF, VIS, etc.)
<input type="checkbox"/>	Make sure your membership dues invoices are being paid to the WSPTA.
<input type="checkbox"/>	Platinum Membership Award (no 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.
<input type="checkbox"/>	February 28 <sup>th</sup> - Treasurer's Deadline for: <ul style="list-style-type: none"> <li>• IRS Form 1099-MISC to IRS. (N/A if no Independent Contractors 1099-MISC issued)</li> </ul>
<b>March</b>	
<input type="checkbox"/>	Plan to attend the March <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2 <sup>nd</sup> Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<input type="checkbox"/>	March 1 <sup>st</sup> - Postmark deadline for the following WSPTA Applications and Awards: <ul style="list-style-type: none"> <li>• Membership Award Applications- (100% Teacher, 100% Membership)</li> <li>• Local PTA and Council Award Applications to WSPTA Office (Standards of Excellence, Outstanding Communications, Outstanding Newsletter&amp; e-Blast, Outstanding Website, Outstanding Local Unit of the Year).</li> <li>• PTA Men's Essay Contest Entries to WSPTA Office</li> <li>• Leadership Academy Award Applications to WSPTA Office</li> </ul>
<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 Membership mtg., mention upcoming PTA training opportunities for members (e.g., PTA training and parent education classes at Convention). Document in the Membership mtg. minutes that you encouraged members to attend. If not already done, give a recap of Focus Day at the Membership mtg. and document the recap in the minutes. For SoE app: Make a copy of the minutes showing you did both.
<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(s). 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"/>	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. A WSPTA Non-Signer Review of Bank Statement Form is available. 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. 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"/>	Make sure your Nominating Committee is meeting and making progress on 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 (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> websites. (1 region example, 2 WSPTA, 3 National PTA, and 4 council/any level examples = 8 pts. max SoE)



<input type="checkbox"/>	Start planning who will 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 at least 15 days prior to your next Membership meeting and elect officers at that meeting. Officers must be 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 Membership 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 checked="" type="checkbox"/> <b>April</b>	
<input type="checkbox"/>	Plan to attend the April <a href="#">Issaquah PTSA Council Membership meeting</a> (usually 2 <sup>nd</sup> Thursday each month). Send a voting delegate if you cannot attend. Delegates are always invited to attend with you, too! Any member of your PTA/PTSA can attend for you, but only delegates may vote.
<input type="checkbox"/>	Plan to attend the Issaquah PTSA Council Awards and Recognition Event. April 4th from 6:30-7:30pm at Issaquah Middle
<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. A WSPTA Non-Signer Review of Bank Statement Form is available. The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during March.
<input type="checkbox"/>	Promote the WSPTA Annual Convention (scheduled for May 18-20) 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.)
<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 Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> 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 <sup>th</sup> .)
<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 Membership meeting and elect officers at that meeting. Officers must be 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 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 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"/> <b>May</b>	
<input type="checkbox"/>	Plan to attend the <a href="#">Issaquah PTSA Council Membership meeting and End of Year Luncheon</a> . The luncheon directly follows the Membership meeting (May 17 <sup>th</sup> , 11-1 pm @ 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 <b>RECEIVED</b> by Secretary of State's Office by May 31 <sup>st</sup> . Have Treasurer report this to Board and/or members.

**Acronyms**

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<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. A WSPTA Non-Signer Review of Bank Statement Form is available. The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during April.
<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.
<input type="checkbox"/>	Make certain that your WSPTA Convention delegates are registered and able to attend the Convention (May 18-20). 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"/>	Send out an End of School Year Survey to your members (via e-News, website link, Facebook). Use this survey to gather feedback and help you plan/set your goals for next year. Contact council <a href="#">webmaster</a> , for help with preparing your survey. Each unit pays dues to Council to cover survey costs. For SoE app: Print survey or the e-News 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 Membership meeting* and elect officers at that meeting. Officers must be 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 Membership 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 Membership meeting!
<input type="checkbox"/>	If you have already elected next year's officers, make sure that you have a 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 Membership 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 Membership mtg. minutes with this information listed.
<input type="checkbox"/>	Consider planning a year end 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 Year End 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 10 <sup>th</sup> 11-1pm @ Meydenbauer Ctr) or Breakfast (TBD: usually the following Wednesday, 7-8:45am @ Eastridge Church). Partner with ISF Ambassador for your school. Contact <a href="#">ISF PTSA Liaison</a> for help.
<input type="checkbox"/>	Ask delegates to give a report to the membership on the WSPTA Convention. (This can be done at Membership mtg., in newsletter, on website) Print the report as an example of how you communicate WSPTA info to your members! Needed for 2018-19 SoE application.
<input type="checkbox"/>	Share an article or information from Council, Region 2, WSTPA and/or National PTA with members (at Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> 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! <a href="#">Doodle.com</a> 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 <a href="#">school and district facility use requests</a> for next year <b>MUST</b> to be sent (or hand delivered) to the ISD Facilities Specialist at the district office <b>no later than June 1<sup>st</sup> each year</b> . If you aren't sure if you will need a specific room/facility, submit it anyway. The district tries to give preference to PTAs, but needs these forms. You can also call (425) 837-7127 for help with the process.
<input type="checkbox"/>	<b>May 31<sup>st</sup></b> – 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.
<b>June</b>	
<input type="checkbox"/>	Ensure the Treasurer gives a May 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. A WSPTA Non-Signer Review of Bank Statement Form is available. The Treasurer should also report whether there were claims/no claims filed against your PTA's insurance during May.
<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.
<input type="checkbox"/>	No Council meeting this month. A Training session will be provided in its place for all incoming officers to help meet the WSPTA training requirement.
<input type="checkbox"/>	Update PT Avenue with board members for the 2018-19 fiscal year.
<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 Membership meeting, in newsletters, 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, <a href="#">WSPTA</a> or <a href="#">National PTA</a> 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 6/30/18 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 <sup>st</sup> week of August for elementary schools and the 2 <sup>nd</sup> 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.) Pay attention to new amendments approved at WSPTA Convention.
<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"/>	Ensure PT Avenue is closed out prior to June 30 by the Head Administrator. You will be assessed a fee if WSPTA has to do this for you.

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Thank you for your time and dedication in serving the students, their families, and the staff in your school and the entire Issaquah School District!

We hope you enjoy your well-deserved summer vacation.  
-Issaquah PTSA Council Board of Directors