

## **30 POINT UNIT CHECK-UP**

### **PTA BASICS**

- We have read our bylaws.
  - Our current bylaws expiration date is \_\_\_\_\_.
- We have paid our insurance invoice.
- We have submitted our Annual Officers' Contact Information (Form A).

### **PRESIDENT'S GUIDE**

- We have a calendar of meetings and events.
- Meetings are planned and an agenda is prepared and shared.
  - We hold our annual meeting as per our bylaws in the month of \_\_\_\_\_.
- Our secretary establishes a quorum of \_\_\_\_\_ before voting takes place.
- Motions are recorded and seconded before discussion takes place.
  - We use Robert's Rules of Order Newly Revised.

### **PTA BOARD**

- Our secretary files the minutes in a timely fashion for approval at the next meeting.
- Our committees submit a plan of work.

### **FINANCE AND INSURANCE**

- We have adopted a balanced budget by vote of our membership.
  - Amendments to the budget are approved by vote of our membership.
- Our fundraisers are planned to support our programs, activities and leadership training.
- Our checks are signed by 2 authorized PTA signers.
  - Signers are appointed by motion and approved by vote of our membership.
- Our treasurer presents an activity report and a budget report at each meeting.
- We have an annual audit with a signed statement given at the first meeting of the succeeding school year.
- We have filed our IRS Form 990 for the fiscal year ending June 30.
- We refer to the green-yellow-red light for insurance recommendations when planning our activities.

### **MEMBERSHIP**

- We have a membership goal of \_\_\_\_\_.
- Our dues to become a member are \_\_\_\_\_.
- We maintain a roster of our members.

### **BYLAWS, PROCEDURES, NOMINATIONS AND ELECTIONS**

- We have approved procedures for officers and committees.
- We follow our bylaws for the make-up of our nominating committee.
- Our vote for new officers takes place in the month of \_\_\_\_\_.
  - We accept nominations from the floor as per our bylaws.

### **ADVOCACY**

- We include advocacy efforts in our annual plans.
- We inform our members of the positions of NYS PTA found in the "Where We Stand" document.

### **SCHOOL AND COMMUNITY**

- We support student success by promoting the National Standards for Family School Partnerships.
- We seek to partner with our teachers, principal, school board and community.

### **PROGRAMS, AWARDS AND RECOGNITIONS**

- We follow the 3-to-1 rule of three planned programs for every one fundraising activity.
- We have a NYS PTA Pick a Reading Partner Program (PARP).
- We participate in the National PTA Reflections Arts Program.
- We recognize our members and partners with NYS PTA and National PTA awards.