

30 POINT CHECKLIST FOR UNITS (2021)

PTA BASICS

- We have read our bylaws.
 - Our current bylaws expiration date is _____.
- We have paid our insurance invoice on _____ and have received our insurance certificate.
- We have updated our officers' contact information on Memberhub.

THE PRESIDENTS GUIDE

- We have a calendar of meetings and events.
- Our 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 _____ members present before voting takes place.
- Motions are recorded and seconded before discussion takes place.
 - We use Robert's Rules of Order Newly Revised.

THE PTA BOARD

- Our secretary records the minutes and presents them 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 signatories.
 - Signatories are approved by the Executive Committee.
- Our treasurer presents an activity report and a budget report at each meeting.
 - Monthly bank statements are reconciled and signed by a reviewer who is not an approved account signatory. Statements with reconciliations are retained by the treasurer.
- We have an annual audit with a signed report 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 play-pause-stop list 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 elected nominating committee.
- Our vote for new officers takes place in the month of _____. We accept nominations from the floor as per our bylaws.

PTA 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 Region, NYS PTA and National PTA awards