

# PTA COUNCIL EXECUTIVE BOARD CHECKLIST

## THE PTA COUNCIL EXECUTIVE BOARD MUST

- Understand the PTA's purposes and policies.
- Represent the diversity of the school community.
- Participate in leadership training programs.
- Distribute materials promptly.
- Create a climate of support and mutual respect.
- Delegate responsibility.
- Train and encourage new leaders.
- Network and collaborate with other community groups and agencies.

## A CHECKLIST FOR PTA COUNCIL SCHEDULE

- Council meetings, setting dates early in the year, making an effort not to conflict with district PTA dates
- Meeting(s)/conferences(s) for unit presidents, school principals, school district superintendents(s)
- Workshops and conduct them for unit officers and chairmen, possibly in conjunction with a council meeting, to help train and develop leadership
- Remittance of monies (membership per capita, insurance, etc.)
- Receipt of officer and unit Executive Board contact information and copies of (1) adopted budgets, (2) annual financial reports, (3) audit reports (including audit checklists and recommendations), and (4) tax returns required from units, and forward this information to district by the district due dates
- Review of units' financial documents, making recommendations to units as necessary and report findings to the district PTA

## PREPARE

- Council Directory to be distributed to unit presidents, site administrators, the district president, school district personnel, and others as appropriate
- Reports to send to 33rd district PTA master calendar to help avoid conflicts in scheduling

## OBTAIN COPIES OF UNIT

- Audits (including checklists and recommendations), adopted budgets and financial reports • Tax returns
- Workers' Compensation Annual Payroll Report forms • Unit Annual Historian Report form to forward to the district PTA • Officer contact information

## SHARE

- All important information, in a timely fashion, with unit officers
- Ideas on how to utilize PTA publications (e.g., California State PTA Toolkit and National PTA publications)
- Information from district PTA, California State PTA and National PTA with appropriate school district personnel

## SPONSOR

- Council conferences/retreat where district PTA officers and chairmen and school district personnel share their expertise
- Programs dealing with current issues of concern to the community • Candidates' nights for school board, city council and other elected offices • Educational symposiums and forums • State of Our Schools

## MONITOR

- School board meetings on a regular basis • City council meetings, as necessary

## ATTEND

- All Council PTA meetings • District PTA meetings, workshops, conferences – and encourage unit representatives to attend • California State PTA convention – and encourage unit delegates to attend
- Occasional meetings of allied agencies and organizations including SM-M Education Foundation, Buy Local, SMMUSD DACs, as appropriate, SM-M Board of Education, etc.