

12 Things to Know or Do

1. Have a yearlong membership campaign. Increasing parent participation is one of the primary goals of PTA. Keep an up-to-date membership list.
2. Submit dues, financial reports and annual report of volunteer hours to council/district PTA by the due dates and file taxes with the IRS and State of California every year! Submit and pay insurance and workers' comp forms and any surcharges directly to AIM, California State PTA's insurance broker by the deadline.
3. Have at least three officers as required by the IRS (president, treasurer and secretary) and make sure that their contact information has been forwarded through channels so that they receive the support, resources and information to which they are entitled.
4. Convene at least three general meetings per year to adopt the budget, annual financial report, year-end financial review, program(s) for the current year; mid-PTA year to elect a nominating committee and adopt the mid-year financial review; early spring to elect officers for the next year.
5. Present a budget for approval by the membership at the first general/association meeting. Spend money only as approved by the membership at a general meeting and properly recorded in minutes of the PTA.
6. Obtain two valid signatures on all checks and have receipts for every payment of any kind. Never pay bills or reimburse with cash.
7. Undertake activities only as approved by the membership at a general meeting and after properly recorded in minutes of the PTA.
8. Follow PTA insurance guidelines for appropriate PTA activities as summarized in the red/yellow/green light section of the *Insurance Loss and Prevention Guide*.
9. Review the bylaws at least once per year. Having the executive board review them together is a great way to orient everyone to the requirements and timelines of their positions. Update at least every third year.
10. Perform financial reviews twice a year, and submit copies of your adopted financial reports (financial review reports including financial review checklist and recommendations, year-end financial report, budget) to your council PTA (if you are in a council) or to your district PTA through the document retention system.
11. Attend council PTA or district PTA meetings – they are there to assist you.
12. Work together – parents, principals, teachers and staff are all one team!