
LOCAL PRESIDENT'S CHECKLIST

Obtain a copy of local unit bylaws from outgoing president and review with elected board.

Study local unit bylaws. Are they current? (renew every three years) Check red stamp date. Locate your Local Unit ID number (for membership cards and Reflections), EIN (for bank), and your membership dues information.

Study Utah PTA State Handbook.

Be enthusiastic. Ask for assistance when needed.

Meet with the outgoing local unit president for helpful information and transfer of PTA material.

Meet with the outgoing treasurer to make name changes at the bank.

Fill board positions (other than those which are filled by elections) with appointees. Include representation from all parents of your school community and others concerned about children.

- Appoint someone over the Awards section of the handbook who will document nominees throughout the year.

Use your transition time (from election until July 1) wisely:

- Meet with your Principal
- Plan your calendar year
- Prepare budget
- Prepare a needs assessment
- Meet with your board members individually and share visions
- Meet with your board to plan your year
- Plan membership goals

Make sure that you and all of your board members understand their responsibilities, receive training, and sign the Basic Fiscal Management Procedures and Local PTA/PTSA Ethics/Conflict of Interest Policy (treasurer section of handbook).

Receive procedure books from the outgoing board members for your board and update where needed.

Find out who your council president is, when he will hold monthly meetings, and what council dues are. Council meetings are your link to Utah PTA. If you can't attend, you should have representation from your board.

Know to what region you belong and who your region director is.

Conduct a needs assessment with your general membership.

Appoint a commissioner and/or chairmen to oversee each individual project or program identified from your needs assessment.

Help the treasurer, with input from your executive committee and commissioners or project chairs, to prepare a budget for the coming year. Plan goals established as a result of the needs assessment. Make sure funds are available for leadership training.

Study the Utah PTA handbook and review report forms (three per year) for which you are responsible.

Make sure the outgoing treasurer has completed a year-end financial report and that the books are prepared for audit.

Attend pre- and post-convention trainings.

Make sure that the appropriate IRS filing (Form 990, 990EZ, or 990N) is submitted by the requested deadline.

Meet on a regular basis with your principal. Remember he/she manages the school and you manage the PTA.

Attend all meetings where local unit should be represented, including district school board meetings.

Meet with your board at least once a month or when needed.

- Prepare an agenda for every meeting you conduct. Send out one week prior to meeting.
- Make sure volunteer hours are collected at each meeting.
- Have principal report on school calendar each meeting.
- Start on time and end on time.

At the end of your term, show appreciation to your board and volunteers.

At the end of the year, make sure the treasurer's books are submitted for audit. The executive committee appoints an audit committee (non-check signers) or independent auditor. (Final date for audit completion is August 1.)

Your term goes from July 1, 2008–June 30, 2009. Transition goes from election through the end of June. (The books close on June 30.)