

LOCAL PTA/PTSA PRESIDENT'S CHECKLIST



Key Responsibilities and Actions

Bylaws and Governance

- Review Bylaws: Obtain and review a copy of your local PTA bylaws. Ensure they are current and renewed every three years.
- Board Positions: Fill board positions with appointees, ensuring representation from all areas of the school community.
- Transition: Meet with the outgoing president for a smooth transfer of materials and information.

Planning and Organization

- Transition: Schedule meetings with the principal and board members, to plan the calendar year, prepare the budget, conduct a needs assessment and make goals for the coming year.
- Appoint: In consultation with the Executive Committee, appoint necessary commissioners and committee chairs to run programs and events for the coming year.
- Training: Ensure all board members understand their responsibilities and receive necessary training.
- Procedure Books: Obtain and update procedure books from outgoing board members.

Financial Management

- Banking: Assist the treasurer in making necessary name changes at the bank after July 1.
- Budget Preparation: Work with the treasurer and board to prepare a budget for the coming year, ensuring funds support program needs and are available for leadership training.
- Financial Reconciliation: Ensure the outgoing treasurer completes a year-end financial report and prepares for the Annual Financial Reconciliation (AFR) by August 1. Ensure annual financial report is given to general membership at first meeting of the year.

Communication and Reporting

- Council: Identify your council, attend relevant meetings, and maintain communication with council and region leaders. President, President Elect and Principal or their designees should attend all council meetings.
- Reports: ensure all required reports are submitted online three times a year.
- Financial Reporting: Ensure the treasurer has submitted electronically both the End of Year and Beginning of Year documents.

Membership and Engagement

- Membership Drives: Conduct membership drives throughout the year and maintain a membership database.
- Volunteer Recruitment: Recruit and mentor volunteers and future leaders, ensuring ongoing communication with members.
- Advocacy: Be aware of annual Utah PTA legislative priorities and attend all advocacy conference or send representative from your PTA.

Meetings and Events

- General Membership Meetings: Held at least 3 times a year to conduct the business of your PTA.
- Board Meetings: Meet with your board at least once a month where plans are made for PTA program and events. Ensure the principal, teacher and treasurer reports are made, and ensure timely collection of volunteer hours.
- Executive Meetings: Meeting of elected officers to plan meetings dates and times, budgets and keep PTA purposes and goals on track.
- Principal Collaboration: Maintain regular communication with the principal, who serves as the administrative vice president of the PTA.
- Events: The president is an ex-officio member of all committees and the official representative of PTA and should attend events, programs and meetings of the PTA.
- Utah PTA Leadership Convention: Annual training offered by Utah PTA for all local and council board members to learn and grow in their PTA position. Budgets should cover for this training yearly for at least 2 board members, but you should take as many as you can.