

The summer is a welcome break from all things school-related, but some preparation is necessary to start the school year smoothly. Below, find two lists to consider when preparing for the new PTA year.

“Today’s preparation determines tomorrow’s achievement.” – Unknown

NEW SCHOOL YEAR CHECKLIST

GOVERNANCE

- Review all governance documents – bylaws, standing rules (if adopted) – and become familiar with their contents.
- Make a note (if these documents have not been updated within the last three years) to create a committee to review these documents for possible amendments. Request a copy of the suggested bylaws template from Tennessee PTA at ptastateoffice@tnpta.org
- Make copies of these documents for each board member or create access via electronic means (Dropbox, Google Drive, etc.).
- Verify that Tennessee PTA has a copy of your latest documents. If in doubt, email to ptastateoffice@tnpta.org.
- Make copies of the your PTA bylaws for each board member or create access via electronic means (Dropbox, Google Drive, etc.).
- Reviewed the “Good Standing” requirements with all board members and assign responsibilities for completion of requirements.

COMMUNICATION

- Confirm that you have the correct contact information for all members of your board.
- Create a board roster with names, mailing addresses, email addresses, and telephone numbers. Make copies for each board member or create access via electronic means (Dropbox, Google Drive, etc.).
- Complete the Tennessee PTA Incoming Officer Information Form, and send it to ptastateoffice@tnpta.org, or complete the online form at <https://tnpta.org/index.php/other-local-unit-forms/>. Submit all incoming officer or changes in MemberHub as soon as possible. Complete an update even if the officers haven’t changed
- Update the PTA’s social media sites with back-to-school reminders (school calendar, new teacher information, welcome-back event information, school supply lists, ways to join, etc.).

RELATIONSHIPS

- Contact each board member, and spend some time getting to know more about them (why they joined the board, what their expectations are, what they want to accomplish, what talents/skills they bring to the group, etc.).
- Schedule time for teambuilding for the board members.
- Confirm that all incoming board members have met with their predecessors and transferred all materials.
- Set the time, date, and location (or platform/app) for a board orientation for new and returning board members.

FINANCIALS

- Confirm that a budget for the 2022-2023 school year has been approved. If not, approve at the next board and general membership meetings.
 - Review the approved budget for information, and check for any necessary amendments.
 - Confirm that the signatories have been changed at the bank as soon the 2022-2023 officers are in place.
 - Confirm that a financial review or audit has been completed before transferring any materials to the new signers.
 - Confirm that the correct IRS Form 990 has been filed and submit a confirmation of receipt to Tennessee PTA on or before November 20th.
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PLANNING

- Approve Plans of Work for each board member, or schedule this item of business for the next board meeting.
 - Set goals for the coming school year, and prepare to publicize them to the members for feedback.
 - Schedule all meetings (board and membership) for the coming year.
 - Distribute the *Procedure Book – Suggested Contents* document to all board members, and set expectations.
 - Confirm that the membership vice president/chair has the necessary forms for recording members and dues paid.
 - Confirm that the treasurer has the necessary form for submitting member information and dues to Tennessee PTA or has access to the MemberHub account.
 - Consider setting up a free MemberHub account, if not already existing.
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SUMMER BREAK REMINDERS

Have you ...

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- Set the time, date, and location (or platform/app) for the first board and membership meetings?

 - Set a first call/meeting with your principal?

 - Updated the signers on the bank account(s)?

 - Subscribed to all National PTA electronic publications, and encouraged your board members to do the same?

 - “Liked” and followed National and Tennessee PTA social media accounts, and encouraged your board members to do the same?

 - Reviewed the National PTA Local PTA Leader Kit, and encouraged your board members to do the same?

 - Completed the appropriate National PTA eLearning courses, and encouraged your board members to do the same?

 - Added the dates and times for the Tennessee PTA Local Leader Connections calls to the PTA board calendar?

 - Renewed your PTA’s insurance coverage?

 - Confirmed that the IRS Form 990 was filed and a copy of the confirmation receipt is added to the treasurer’s report and the secretary’s minutes.

 - Identified potential leaders to fill any vacancies on the board or committees (if any), and encouraged their engagement?

 - Begun to prepare the first board and association meeting agendas, and determined how you will distribute them?

 - Thought about how to add fun into all meetings?

SOURCES

- Tennessee PTA website www.tnpta.org
- Tennessee Instagram [tennessepta](https://www.instagram.com/tennessepta)
- [National PTA Local PTA Leader Kit](#)
- [eLearning Courses](#)
- Tennessee PTA Board of Directors ptastateoffice@tnpta.org
- Tennessee PTA Facebook <https://www.facebook.com/TennesseeStatePTA/>