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](mailto: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](mailto:ptastateoffice@tnpta.org).
- Make copies of 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](mailto:ptastateoffice@tnpta.org), or complete the online form at [https://tnpta.org/index.php/other-local-unit-forms/](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.

## 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.
NEW SCHOOL YEAR
CHECKLIST / SUMMER BREAK REMINDERS

SUMMER BREAK REMINDERS

Have you …

☐ 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  tennesseeppta
▪ National PTA Local PTA Leader Kit
▪ eLearning Courses
▪ Tennessee PTA Board of Directors  ptastateoffice@tnpta.org
▪ Tennessee PTA Facebook  https://www.facebook.com/TennesseeStatePTA/