

Please complete this internal checklist to ensure your PTA unit will be ready for a great start next school year!

Executive Board (President/VP/Treasurer/Secretary) verify:

- Good standing items of 2019-2020 have been completed and submitted to the Minnesota PTA Office:
 - Officer list is up-to-date via MemberHub or by mail
 - Standing Rules (submitted once and again if changes are made)
 - 990 tax filing for 2018-19 fiscal year
 - Membership dues paid
- Did your unit file with the Minnesota Secretary of State this school year? **Y / N**
 - If so, what is your file number _____
- Does your unit file annually with the MN Attorney General? **Y / N**
- Completed closing books
 - Paid outstanding debts
 - Fulfilled reimbursements
 - Deposited all funds (placed unused gift cards under lock and key)
 - Finalized balancing of the account
 - Completed a financial review (see worksheet for this)
- Budget for 2020-2021 approved or vote scheduled for first meeting in fall
- Meeting minutes completed/approved
- PTA calendar drafted, or completed and approved for 2020-2021 school year
 - Set date/time/location for executive board and general meetings
 - Community events (carnivals, movie nights, STEM events)
 - Student support (field trips, book fair, supplies, etc.)
 - Reviewed fundraising options and timeframes

Other important items to review:

- PTA items returned to storage/central location
 - Popcorn/candy cotton machines are cleaned (if possible, if not already done)
 - Nametags, lanyards, etc., turned in to secretary if needed
 - Binders/folders/PTA paperwork - Returned to central location or accounted for and updated with most recent information
 - Passwords for PTA accounts are passed on to new officers
 - Outgoing officers turned in keys and access codes turned in to secretary
- Physical inventory/inspection of our hardware and verify all items are present and stored appropriately (popcorn makers, games, signs, etc)
- Physical inventory/inspection of goods and verify items are stored correctly (prizes, donations, etc)
- Review of food items in storage, tossed or safely stored any perishable items, and secured nonperishables from pest infestation
- Social media and website pages are updated - old objects removed

Over the summer our incoming officers and executive board know they can:

- Subscribe to the Minnesota PTA Officers group on Facebook to stay informed
- Subscribe to the Minnesota PTA Facebook page to keep up to date
- Engage in leadership training on PTA.org to advance their skills
- Watch email for online training opportunities from Minnesota PTA
- Email the Minnesota PTA office with questions or to learn about more opportunities

Any item not completed should be completed as soon as possible prior to the beginning of the next school year.