

Required vs. Recommended

Below are lists of some items that are required by PTA and some that are strongly recommended. These lists are not all inclusive and we suggest that you familiarize yourself with the CAPTA Toolkit for more information.

Required:

- Have at least 3 officers – president, treasurer and secretary.
- Have your principal as a member of your executive board.
- Dues for at least 15 members by Oct 20th.
- Tax return, insurance payment, workers' comp form, financial reports, volunteer hours report filed.
- Have at least 3 general meetings per year: September – approve the budget; January – elect nominating committee; March – elect officers.
- Hold Executive Board meetings regularly per your by-laws
- Checks signed by 2 people
- Have a budget approved by the membership at the first meeting.
- Membership must approve all expenses and fundraisers,
- Do audits twice a year, January and July, or according to the bylaws.
- Review and update unit bylaws at least once every three years.
- Follow PTA insurance guidelines for appropriate PTA activities
- Attend council PTA meetings – the council is there to assist you.
- Provide a donation receipt to any donor requesting one
- Have full disclosure on all of your reports and minutes.

Recommended:

- Have at least 7 officers – VP's and chairs of events.
- Have procedure books for all officers and events that can be passed on the successors.
- 5% more members than the previous year.
- Have a general meeting every month if you have valid business to conduct.
- Give a receipt for every purchase and donation to the PTA.
- Give every member a membership card each year.
- Meet regularly with principal to discuss school & PTA matters.
- Thank your volunteers publicly and immediately.
- Prepare and publish an agenda 10 days prior to meetings.
- Maintain and use a "PTA only" email list of your members.
- Do not carry over more than 50% of your operating budget.
- Give Honorary Service Awards at your unit in lieu of gifts.
- Include the incoming board on the budget committee.
- Utilize your parliamentarian to maintain order and proper procedure.
- Review the bylaws every year.
- Update all of your PTA forms every year.