

Monthly Items (These items will need to be done most months)

- _____ The secretary or president sends/posts the agenda for the executive board meeting ten (10) days before the meeting (in writing). This agenda only goes to the executive board.
- _____ Make sure the five-minute audit is done. A non-check signer should do the monthly five-minute audit. This can be the auditor, a member of the audit committee, or a non-signing member of the executive board. See attachment.
- _____ President receives financial reports from treasurer prior to executive board meeting.
- _____ Treasurer distributes financial reports to all officers to review before the executive board and/or the association meeting.
- _____ Secretary distributes in person or by email the minutes for officers to review.
- _____ Meet weekly or monthly with the principal to coordinate and discuss PTA/school business.
- _____ Request that VPs and chairs submit names of volunteers monthly so you can thank them.
- _____ In months that the unit has an association meeting the secretary or president sends the agenda for the association/general meeting ten (10) days before the meeting (in writing). NOTE: Bylaw amendments or changes need 30 days' notice and presentation of slate of officers requires 28 days' advance notice. Other agenda items only need 10 days' notice.
- _____ In in-council units, the president, EVP (executive vice president), or both attend council-level meetings (president meetings, council general meetings) and attend Sixth District general meetings.
- _____ If a unit is out of council, president, EVP, or both attend Sixth District general meetings.
- _____ Send any changes and additions in your roster to your council and Sixth District.
- _____ Out-of-council units send any changes and additions in your roster directly to Sixth District.
- _____ Send membership dues (per capita portion) to your council or to Sixth District (if out-of-council).
NOTE: A minimum of 15 members must be submitted to stay in good standing or to be considered for awards/grants.
- _____ Make sure all items are checked off from the previous month's list.