

END OF YEAR CHECKLIST

7 steps to take before your PTA year ends



1. THANK YOUR VOLUNTEERS

Most people don't volunteer for personal recognition, but recognizing and thanking them for their service keeps them coming back and encourages others to step up and start volunteering. Check out these [ideas](#) for showing your volunteers how much they mean to your PTA.

2. REGISTER YOUR NEW OFFICERS

Be sure to [register](#) your new officers in MemberHub as soon as they are elected so they can receive information they need. Even if you have the same officers as last year, you still need to register them to confirm their contact information.



3. WRAP UP YOUR PTA'S FISCAL YEAR



Many PTAs have their fiscal year ending on June 30th (check your bylaws), which means it's time to handle the end-of-the-year tasks so your PTA is ready to start off on the right foot when school starts. Make sure you get those last deposits in and write those last checks before the end of your fiscal year and submit your last membership dues payment in MemberHub.

4. PREPARE FOR YOUR AUDIT

The purpose of an audit is to certify the accuracy of the financial records and assure the membership that the association's funds are being managed in a business-like manner, within the regulations and budget established for their use. Follow these [instructions](#) to complete your PTA audit.

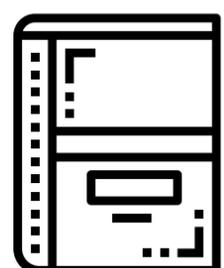


5. NEW OFFICER TRAINING

Illinois PTA offers free training courses to help PTA leaders (and any interested PTA member) learn how to do their PTA job. Contact your district or region director or the State Office to find out when training is scheduled or to set up training.

6. MAKE SURE PROCEDURE BOOKS ARE UP TO DATE

A procedure book helps preserve your PTA's knowledge and makes it easier for a new volunteer to get up to speed on their position. These materials may be kept and passed on in a binder, on a flash drive, or as electronic files stored in the cloud to access and download.



7. PASS ON MATERIALS

If you're an outgoing president, make sure your officers and committee chairs are passing on their procedure books and other materials. If you're an incoming president, keep in touch with both your new officers and chairs and the outgoing officers to make sure your board has the tools they need to be successful next year.

