



## Overview:

Did you know that Washington State PTA (WSPTA) “best practices” closely align with the WSPTA “Standards of Excellence Award”? This timeline breaks down the compilation of the Standards of Excellence into manageable sections and ensures your PTA or council is following best practices!

**Why best practices?** To guide your PTA or council to be child focused, responsible to your members, fiscally responsible, knowledgeable, involved, and well-trained. Following best practices makes earning the Standards of Excellence award easy to apply for and receive.

**Remember:** Following best practices does not mean you have to check off everything on the list. Your goal should be to check off more this year than last year and/or improve on those items you do check off. If you do not check off something this year, work with your board to come up with ways to accomplish it next year.

## Resources:

- WSPTA Best Practices Checklist
- Award applications (<https://www.wastatepta.org/events-programs/awards/excellence/>)

## Items required for Standards of Excellence Award:

- ✓ Minutes from membership or board meeting where goals were voted on and approved; copy of goals.
- ✓ Up to three examples of programs, with descriptions which address different goals.
- ✓ Examples of two types of communication to members.
- ✓ Up to two examples of how you determine members’ needs; brief description of how you used the information to change your programs or activities.
- ✓ Membership campaign – three different dated examples (e.g. Fall/Winter/Spring; different target audiences, etc.).
- ✓ Up to three examples of how you advocate for children.
- ✓ Complete list of membership meeting and board meeting dates; how you communicate that to members.
- ✓ Up to two examples of how you recognize volunteers by name.
- ✓ Awards offered (i.e. Golden Acorn, Outstanding Educator, etc.) and announcement of winners.
- ✓ Minutes showing approval of budget and copy of budget.
- ✓ Prior fiscal year-end financial review; minutes showing review being discussed at membership meeting.
- ✓ Monthly financial reports (July through January).
- ✓ Prior fiscal year-end financial report (different than June monthly financial report).
- ✓ Minutes showing election of nominating committee.
- ✓ Copy of signed and dated nominating committee report.
- ✓ Minutes showing election of current year officers.

- ✓ Copy of insurance certificate.
- ✓ Copy of IRS 990; Charitable Solicitations; Corporate Renewal.
- ✓ Copy of completed Standards of Affiliation (SOA) agreement checklist.
- ✓ Copy of completed training tracking spreadsheet.
- ✓ Copy of registrations for Legislative Assembly.
- ✓ Up to four examples of sharing region, WSPTA, and National PTA information with members.
- ✓ PTAs in a council: Documentation from council showing meeting attendance. OR PTAs not in a council: Example of working with other PTAs or similar organizations.

The **platinum level** of the Standards of Excellence Award (optional) includes more requirements such as:

- ✓ Additional examples of some items listed above.
- ✓ Goal development process and goal evaluation.
- ✓ Program evaluation.
- ✓ Show membership increase and membership award applications (for example, 100% staff); membership goal; up to two examples of sharing membership benefits with members.
- ✓ Family and community engagement examples.
- ✓ Mid-year financial review.
- ✓ Sharing PTA trainings with members.
- ✓ Officer transition plan, board retreat, committee chair transition plan, and committee chair training.
- ✓ Participation in Reflections; example of student recognition.
- ✓ Members of your PTA in active leadership roles at the council, region, state levels, and/or school district.
- ✓ Sharing *Our Children* (National PTA's magazine) with members.
- ✓ Examples of how you make use of WSPTA and National PTA programs and resources.

<b>September/October Action Items</b>	
<b>At your first membership meeting, vote on the following and capture it in your minutes:</b>	
	Goals were approved.
	Standing rules reviewed/updated and approved.
	Prior fiscal year year-end financial review results were discussed and approved.
	Current fiscal year budget was approved (if not done last year or if updates are required).
<b>Collect any documents from last Spring:</b>	
	Minutes from the election of officers from membership meeting.
	Copy of signed nominating committee report from election of current officers.
	Example of spring membership campaign (dated).
	Copy of prior fiscal year Charitable Solicitations filing.
	Copy of end of prior fiscal year method of determining members' needs.
	Proof of attendance to WSPTA Convention.
	Copy of registration (or proof of attendance) for region conference, Leadership Conference, or other approved trainings.
	Article showing recognition for any or all awards given last Spring (Golden Acorn, Outstanding Advocate, Outstanding Educator, etc.).
<b>Print out copies of updated award forms; review with the board to decide which awards to apply for.</b>	

<b>Items to think about:</b>	
	Do you have programs and activities to support goals? If not, begin discussions on developing them.
	What are you doing to advocate for children (not just legislatively, but at school board meetings, at your school, etc.)?
	Do you have an ongoing membership campaign that welcomes all who wish to join and participate?
	Have you set a meeting schedule for the year for board and membership meetings to address the needs of your membership and conduct business?
	Do you have a committee chair and/or volunteer training and resources?
	Do you have a communication plan for the year?
	Launch Reflections!
<b>Collection list for September/October:</b>	
	Membership brochure/flyer for Fall campaign (dated).
	Copy of PTA and the Law registration (or proof of attendance).
	Copy of first example of child advocacy.
	Copy of Legislative Assembly registration.
	Example of how you met members' needs (example – new program to address survey response).
	Depending on the month your PTA was incorporated, you may need a copy of your corporate renewal from prior fiscal year if you will not renew prior to February of the current year.
	Copies of any membership meeting and board meeting minutes to date.
	Copy of financial reports for July, August, September, October.
<b>November Action Items</b>	
<b>Items to think about:</b>	
	Do you have a process to evaluate your current year's goals, programs, and activities?
	Make sure your treasurer is sending monthly financial reports to your board. This can be done by email if you do not have a meeting each month.
	Does your PTA participate in council meetings? This can be the president or your designated representatives. It is important to attend to keep up to date on current happenings in the district, training, and participate in the sharing of activities with other local PTAs. It is also important for your development as a leader.
<b>Collection list for November:</b>	
	Copy of signed and completed Standards of Affiliation (SOA) agreement checklist.
	Copy of updated insurance certificate.
	Complete list of membership and board meeting dates and how it was communicated to members.
	Copies of any membership meeting and board meeting minutes to date.
	Copy of financial report for November
	Documentation for all trainings attended July through November (region conferences, PTA and the Law, Leadership Conference, etc.)
	Copy of Legislative Assembly registrations
	Copy of another way you've advocated for children
	Description of transition process.
	List of other PTAs/organizations your PTA works with (mostly for non-council PTAs).
<b>Don't forget:</b> it is never too early to elect your nominating committee!	

## December Action Items

### Items to think about:

Think about ways that you recognize your volunteers. You probably do more things than you know, but if you don't, there is time to brainstorm easy, inexpensive ways to acknowledge their hard work.

Start talking about the coming Spring's WSPTA Convention and make sure your budget is adequate.

Think about how you determine your members' needs. There is still plenty of time for formal surveys or setting up other avenues of collecting member information.

Think about how your PTA passes on materials and records to the next year's officers and committee chairs. If you don't have materials to pass on, now is the time to start putting together notebooks. It is easier to find volunteers when you can assure them they will have information and history to look back on.

### Collection list for December:

Copies of any membership meeting and board meeting minutes to date.

Copy of financial report for December.

Copy of 990.

Volunteer recognition samples (for example, volunteer appreciation flyer or newsletter).

Budget highlighting upcoming Spring convention expense.

Examples of five programs and descriptions.

Example of communication with members.

**Don't forget:** Awards are due to WSPTA by March 1. Review the award forms and come up with a plan to address any gaps over the next two months.

## January/February Action Items

### Items to think about:

Be sure you are communicating in a variety of ways with your membership about PTA issues and activities. Don't count on just your newsletter/e-news to get the word out – use flyers, reader board, posters, email messages, website, etc.

Are you passing on information from WSPTA and National PTA to your membership?

Get your awards committee going so they can be on the look-out for possible candidates for Golden Acorn, Outstanding Advocate, Outstanding Educator, etc. Forms are on the WSPTA website. Make sure your budget is adequate.

Third example of how you advocate for children.

Where are you on your membership campaign? It's a great time to launch a New Year campaign? How about staff membership? Reach out to them again.

Complete the mid-year financial review and discuss it with the board and membership.

Does your PTA have members in active leadership roles at the council, region, state, or national levels – if so document.

Does your PTA have examples of family and community engagement or other outreach efforts?

Does your PTA have examples of making use of WSPTA and National PTA programs and resources?

Does your PTA share examples of National PTA's *Our Children* magazine with members?

### Collection list for January/February:

Minutes from membership meeting where nominating committee was elected in accordance with bylaws.

Examples of Winter membership campaign.

	Copies of any membership meeting and board meeting minutes to date.
	Copy of financial report for January and February.
	Copies of any membership awards you apply for (for example, 100% Staff, 100% Membership).
	Examples of information shared from WSPTA and National PTA.
	Documentation from council showing attendance at meetings.
	Copy of mid-year financial review.
<b>Additional tips for January:</b>	
	Very carefully go over the Best Practices Checklist and catch up where you can.
	Very carefully go over the Standards of Excellence application and begin putting your application together.
	If you have questions, contact the WSPTA Standards of Excellence chair.
	Don't forget to apply for other awards.
<b>Additional reminder February:</b>	
	Awards must be postmarked by March 1.
<b>March/April Action Items</b>	
<b>MARCH</b> – <i>Thank you for taking the time to celebrate all that you do by applying for the Standards of Excellence award. There are still items to take care of each month to keep on top of your PTA.</i>	
	Begin spring cleaning of notebooks and files. Put things in order to help ease the transition of new officers.
	Verify the contents of your Legal Documents notebook.
<b>APRIL</b>	
	Enter your new officers on the WSPTA membership database. Enter other key positions even if not elected – membership advocacy, Reflections, FACE, etc.
	Begin training of your new board members.
	Plan your incoming officer and/or board retreat.
	Continue cleaning of notebooks and files.
<b>May/June Action Items</b>	
<b>Action Items:</b>	
	Attend WSPTA Convention in April/May – pay attention to Leadership News for details.
	Upon return, share what you learned with your members in your communication and at a PTA meeting.
	Pass on notebooks and files to next year's board.
	Schedule the financial review for after July 1 – books close on June 30.
	Pat yourself on the back for a job well done.
<b>At your last membership meeting, vote on the following and capture in your minutes:</b>	
	Vote on the budget for the next year.
	Recognize and thank your volunteers.
	Ask for volunteers/people to be involved next year.
	Ensure membership fees are what they need to be – if you need to adjust them, the membership must vote.
<b>Idea:</b> Make your last meeting special and thank everyone for all they did this year to support your community!	