

Getting Started: PTA Leader Checklist

Name: _____ PTA: _____

Position: _____ Year: _____

Use this checklist to track your own progress when you join a board.

Board Duties:

Date Completed:

	Join your local PTA. Either in person or at JoinPTA.org .	
	Register as a board member with Texas PTA at https://txpta.my.salesforce-sites.com/OfficerIntake (PTA Training and Support)	
	Sign a Confidentiality, Ethics, and Conflict of Interest Agreement. See your PTA Secretary.	
	Create a Plan of Work and have it approved by your board.	
	Download a copy of your PTA Bylaws & Standing Rules. (Txpta.org, Governance, Bylaws) https://txpta.my.salesforce-sites.com/BylawsRequest	

Online Training: <https://www.txpta.org/courses>

Date Completed:

	Foundations: Essentials (aka LOT, FLO) One time required.	
	BASICS: Boardsmanship (Every 2 years)	
	BASICS: _____ (your position) Complete each time you take a new role or change schools.	
	Additional BASICS: _____ (Optional)	
	Download Resource Guides every year to have the most updated procedures. Both Boardsmanship & Position Resource Guides. https://www.txpta.org/local-pta-leaders	

Record Keeping, Committee, Networking

Date Completed:

	Update or assemble your procedure book or 'Binder'. Can be digital.	
	Get copies of financial forms from your Treasurer: deposit, reimbursement, tax exempt, etc.	
	Recruit committee members to support your work.	
	Join Local, Council and Texas PTA social media support groups.	

Notes: _____
