



Board Basic Responsibilities Checklist

Respond "Yes" or "No" to each statement below. High-functioning boards and board members will respond "Yes" to all statements. Effective boards and board members strive for "Yes" to all statements.

I, as an individual board member:

| | |
|--|--------|
| 1. Know PTA's mission and purpose and use them to guide my behavior and decisions. | Yes/No |
| 2. Possess a copy of and have read my unit's bylaws and standing rules. | Yes/No |
| 3. Disclose conflicts of interest. | Yes/No |
| 4. Keep confidential PTA's sensitive information and internal discussions. | Yes/No |
| 5. Prepare for meetings by reading all pertinent documents prior to attending. | Yes/No |
| 6. Attend all PTA and board meetings. | Yes/No |
| 7. Prepare and submit required reports in a timely manner. | Yes/No |
| 8. Actively participate in all PTA meetings. | Yes/No |
| 9. Listen respectfully and consider all sides of an issue | Yes/No |
| 10. Help set and then monitor PTA's goals | Yes/No |
| 11. Play an active role in growing membership. | Yes/No |
| 12. Read and understand financial reports, and ensure my PTA stays within budget. | Yes/No |
| 13. Advocate on behalf of PTA. | Yes/No |
| 14. Contribute toward a positive public image of PTA. | Yes/No |
| 15. Mentor and orient new board members. | Yes/No |
| 16. Develop my own skills and avail myself of PTA training. | Yes/No |
| 17. Actively participate in recruiting new board members. | Yes/No |
| 18. Ensure my unit limits risk and is properly insured. | Yes/No |
| 19. Ensure my unit complies with state PTA rules and files appropriate state PTA reports, including reporting of PTA membership and officer contact information. | Yes/No |
| 20. Ensure my unit files appropriate IRS forms and state tax exempt and corporate forms. | Yes/No |

My PTA's board, as a whole:

| | |
|---|--------|
| 1. Knows and follows the mission and purposes of PTA. | Yes/No |
| 2. Knows and follows the unit's bylaws and regularly reviews and updates those bylaws. | Yes/No |
| 3. Creates plans, sets goals, and works assesses progress toward achieving the goals. | Yes/No |
| 4. Monitors and assesses programs and events. | Yes/No |
| 5. Measures impact of its programs and events. | Yes/No |
| 6. Ensures adequate financial resources for achieving PTA's goals and mission. | Yes/No |
| 7. Provides financial oversight and follows good financial practices. | Yes/No |
| 8. Builds a competent board through training, recruitment, and assessment. | Yes/No |
| 9. Ensures legal and ethical integrity by operating transparently, complying with law, and remaining accountable to membership and to each other. | Yes/No |
| 10. Enhances PTA's reputation and public standing. | Yes/No |