**PTO Checklist**

**School Name:**

**Academic Year:**

**Date:**

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| **Question** | **Select**  **One** | **Notes** |
| What kind of Parent Organization (PO) does your school have? | PTO  PTA PTSA  PAC  Other |  |
| Does your PO have a Mission? | Yes No |  |
| Does your PO have Bylaws? | Yes No |  |
| Does your PO have an Employer Identification Number (EIN) | Yes  No |  |
| Is your PO incorporated as a non-profit? | Yes No |  |
| Does your PO have a Conflict of Interest Statement and/or policy? | Yes No |  |
| Does your PO have Articles of Incorporation? | Yes No |  |
| Has your PO defined Dues and Voting Rights? | Yes No |  |
| Has your PO defined and reviewed the Officers’ Roles and Election Procedures? | Yes No |  |
| Has your PO elected Officers? | Yes No |  |
| Is your PO President aware of his/her role? | Yes No |  |
| Is your PO Vice-President aware of his/her role? | Yes No |  |
| Is your PO Treasurer aware of his/her role? | Yes No |  |
| Is your PO Secretary aware of his/her role? | Yes No |  |
| Does your PO have a procedure in place to recruit Members and to review the Members’ Benefits and Roles? | Yes No |  |
| Has your Tax-Exempt Status for your Parent Organization been requested? | Yes  No |  |
| Has your Tax-Exempt Petition been rejected? | Yes No |  |
| Has your Insurance/ Liability Insurance been requested and approved? | Yes No |  |
| Is your PO Treasurer aware of his/her finance updating responsibilities? | Yes No |  |
| Does your PO audit each chapter’s treasurer report or require “financial transparency” as part of annual functions? | Yes  No |  |
| Is your PO aware of the Annual Information Return and its requirements? | Yes No |  |
| Does your PO organization use Robert's Rules of Order or Meeting Norms or Standing Rules? | Yes No |  |
| Does your PO have monthly or regular meetings? | Yes No |  |
| Is your PO information translated to parents’ languages? | Yes No |  |
| Are meetings frequently held? (i.e. monthly meetings) | Yes No |  |
| Are there officers? | Yes No |  |
| Are there standing committees established? | Yes No |  |
| Have the PO Events/Activities been programmed for the year? (i.e. fall festival, reading with parents, family nights, etc.) | Yes No |  |
| Are your PO Events/ Activities aligned to School Improvement Plan (SIP) goals? | Yes No |  |