**Best Practices/Standards of Excellence**

**Description**: Because Best Practices follow so closely with the Washington State PTA “Standards of Excellence” Award this timeline will help break down the compilation of this application into manageable sections. If you are doing most or all of these things then your unit will be more successful, and this will help you track your strengths and areas for improvement. Awards help your unit and your school by relaying the message that this is a place where parents and staff care about kids, and that the unit is well organized and healthy.

**Timeline:**

***\*\*\*SEPTEMBER\*\*\****

*Introduction*

*Best Practices – understand them and relay these to your board. These are available in your leadership packets and on the WA State PTA website.* [*http://www.wastatepta.org*](http://www.wastatepta.org)*. You may download the Standards of Excellence form from this site too.*

*Why Best Practices?*

*To guide our PTAs to be child focused, responsible to our members, fiscally responsible, knowledgeable, involved, and well trained. Following Best Practices makes earning the Standards of Excellence award easier to apply for and receive.*

**Standards of Excellence Award Application:**

* No Binders will be accepted – only 2-pocket folder with 3 fasteners
* Include only what the application asks for, highlight appropriate parts of minutes – FOLLOW DIRECTIONS!

 Only need to include:

* Minutes of general meeting and board meeting where goals were voted on and approved
* Copy of goals
* Up to 5 examples of programs with descriptions
* One example of communication to members
* One example showing how you met members’ needs
* One each for Fall/Winter/Spring membership campaigns – dated
* One flyer/newsletter listing general membership and board meeting dates
* One example showing how volunteers are recognized – newsletter/flyer/minutes
* Presentation of Golden Acorn, Outstanding Advocate and Outstanding Educator awards annually
* One example showing that these awards were given – newsletter/flyer/minutes
* Minutes showing approval of budget
* Financial review checklist and report and minutes showing review being discussed and General meeting
* Up to 8 monthly financial reports
* Standing Rules and minutes showing approval by general membership
* Minutes showing election of Nominating Committee and current officers
* Copy of insurance certificate
* Year- end evaluation process
* Up to 10 examples of State and National PTA info. shared with members
* Description of transition process
* Council sign-in sheet showing attendance at meetings
* Up to 3 other PTAs/other service organizations your unit works with
* If in-person training was received, note showing date, time and presenter, and class attended
* Copy of reimbursement request/registration confirmation for each person attending:
* Region Conference
* PTA and the Law
* Legislative Assembly
* Focus Day
* WA State PTA Convention with budget showing line item for Convention expense highlighted

Collection List for September (keep in a folder you won't lose)

* Minutes of board meeting where Goals were voted on and approved, and copy of Goals
* Minutes of general meeting where Goals were voted on and approved
* Minutes from general meeting where Budget was approved
* Minutes from general meeting where Standing Rules were voted on and approved, and copy of Standing Rules
* Minutes from general meeting where Financial Review results were accepted
* Financial Review Checklist and Report
* Copy of registration for Region conference
* Example of last Spring’s membership campaign
* Article showing award recognition for any or all of these 3 awards: Golden Acorn, Outstanding Advocate, Outstanding Educator

from last Spring

* Minutes from general meeting where officers were elected from last Spring – including the nominating committee report. (See Nominating Committee Handbook for examples of how elections are to be recorded in minutes)
* Copy of registration for State Convention from last Spring and budget line item

***\*\*\*OCTOBER\*\*\****

*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.*

*Things to think about:*

* *Do you have programs and activities to support your goals? If not, begin discussions on developing them*
* *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 GM meetings to address the needs of your membership and conduct business?*

Collection List for October (add to folder you started in Sept)

* membership brochure/flyer
* copy of PTA and the Law registration
* copy of Legislative Assembly registration
* Example of how you met members’ needs

***\*\*\*NOVEMBER\*\*\****

*Don't forget to get that Nominating Committee elected and trained!*

*Things to Think About:*

* *Do you have a process to evaluate your current year’s goals, programs and activities?*
* *Make sure your Treasurer is sending financial reports to your board every month. 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 representative. It is important to attend to keep up to date on current happenings in the district, training, and participate in the sharing of activities and amongst the local units.*

Collection list for November

* copy of insurance certificate
* Board and General Membership meeting schedules
* Description of transition process
* List of other PTAs/organizations your PTA works with

***\*\*\*DECEMBER\*\*\****

*Things 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 WA State 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

* Volunteer recognition samples – volunteer appreciation flyer or newsletter
* Budget highlighting coming spring convention expense
* Examples of 5 programs and descriptions
* Example of communication with members
* Year-End evaluation process

***\*\*\*JANUARY\*\*\****

*Things 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 to get the word out – use flyers, reader board, posters, email messages, website etc.*
* *Are you passing on information from the State 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 and Outstanding Educator. Forms are on the state website. Make sure your budget is adequate.*
* *All Local Unit award applications are due to the state on March 1.*
* *Where are you on your 100% membership? How about staff membership?*

Collection List for January (add to your folder)

* Minutes from General Membership meeting where Nominating Committee was elected in accordance with Bylaws.
* Example of Winter membership campaign
* Monthly financial reports (up to 8)
* Examples of information shared from WA State and National PTA
* Copy of Focus Day registration
* Copy of Council sign-in sheet showing attendance at meetings

***\*\*\*FEBRUARY\*\*\****

*Things to Think About*

* *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 folder together. Mail in plenty of time for deadline!*
* *Don't forget to apply for other awards.*

***\*\*\*MARCH\*\*\****

*Thank you for taking the time to celebrate all that you do by applying for the Standard of Excellence award. There are still items to take care of each month to keep on top of your organization.*

* *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.*

***\*\*\*APRIL\*\*\****

* *Enter your new officers on the State PTA website. Also send them to the Northshore Council PTSA President Elect.*
* *Begin training of your new Board members.*
* *Be sure to attend State PTA Convention.*
* *Plan your incoming officer and/or board retreat.*
* *Continue cleaning of notebooks and files*.

***\*\*\*MAY\*\*\****

* *Pass on notebooks and files to next year's Board.*
* *Schedule the Financial Review for after July 1.*
* *Pat yourself on the back for a job well done.*