



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