Quarter 1 [July – October]: Compliance Checklist

Complete and remit all four checklists to receive #MagicMaker recognition for 2020-2021!

Month	Day		Subject	Send Via	STATUS
Monthly		☐	**Remit Dues:** August ☐ September ☐ October ☐	**Channels**	**Required**
Monthly		☐	**CAPTA Webinar Opportunities:** August ☐ September ☐ October ☐	**Virtual**	**Recommended**
Monthly		☐	*Host/Attend* Executive Board Meetings? (U/C/D – whichever applies to your position!) August ☐ September ☐ October ☐	**Virtual**	**Required**
First Association Meeting		☐	**Did You:** ☐ *Present:* Annual Report ☐ *Adopt:* Audit Report, Budget, Calendar, Fundraisers, Programs	**Upload to MyPTEZ or Send Via Channels**	**Required**
July		☐	**Did You:** ☐ *Attend* Training? ☐ *Confirm* all your officer contact information is in MyPTEZ? ☐ *Update* unit leaders in TOTEM? ☐ *Review* bylaws with the board? ☐ *Submit* financial records for year-end audit? ☐ *Launch* Membership Campaign?		
August		☐	**Did You:** ☐ *Attend* the 23rd District **General Association** Meeting? ☐ *Encourage* your units to attend? ☐ *Plan/Host/Attend* a General Association Meeting for your unit/council? ☐ *Participate* in 23rd District PTA membership challenges?		
September		☐	**Did You:** ☐ *Participate* in 23rd District PTA membership challenges? ☐ *Receive* and share information on 23rd District PTA programs? [Grant opportunities, etc.] ☐ *Submit* for California State PTA grant opportunities?		
October		☐	**Did You:** ☐ *Remit* membership (15 memberships minimum)? ☐ *Submit* a Raffle Report Form (if necessary) *(Deadline: October 1)* ☐ *Apply* for a **California State PTA** scholarship? *(Deadline: October 15)*		

Upcoming Events: *November 1* – Deadline for CAPTA Resolution Drafts; *November 15* – Deadline for Tax Filing (199/199N; 990/990N; RRF-1; TR-1 (If applicable); *December 3* – Reflections entries due to 23rd District PTA