PTO/A SUMMER CHECKLIST FOR NEW BOARDS

Getting your PTO or PTA off to a great start this fall begins with being well-prepared over the summer. Use this checklist to help organize your team, plan ahead, and build strong school-wide engagement before school begins.

READY TO GET STARTED?



MAY/JUNE: BUILD YOUR TEAM + FOUNDATION



BOARD TRANSITION + ADMINISTRATIVE PREP:

Help ensure a smooth leadership transition before summer ends.

- **Collect passwords and account access**
- **Connect with regional/state leaders and review training opportunities**
- **Track insurance and state due deadlines**
- **Locate EIN and tax ID documents**

SET UP YOUR PTO/A BOARD:

Confirm officer roles, responsibilities, and communication expectations.

- **Hold a kickoff meeting for introductions and goal-setting**
- **Identify training or support needs for board members**
- **Create shared folders, email access, and communication channels**
- **Transfer passwords and access to relevant accounts**
  - **Examples: email logins, calendars, social media accounts, and communication apps**

REVIEW OR CREATE BYLAWS:

Make sure your bylaws reflect your current structure, policies, and goals.

- **Review bylaws with the board and possibly a legal advisor**
- **Ask neighboring PTO/As for examples if starting from scratch**
- **Update policies for voting, budgeting, and volunteer expectations**

PLAN YOUR MEETING SCHEDULE:

Set meeting dates early to improve attendance and communication.

- **Create a yearly calendar for board and general meetings**
- **Decide which meetings will be virtual or in-person and who needs to attend**
- **Share dates with school administration and staff**
- **Use Google Calendar or another shared calendar tool for easy accessibility**

JUNE/JULY: FINANCIAL PLANNING + FUNDRAISING PREP



FINANCIAL + BANKING TRANSITION:

Prepare financial accounts and records for the new board year.

- **Prepare any documents to transfer bank account signing authority**
- **Confirm who needs access to financial accounts**

DRAFT A BUDGET:

Create a working budget based on past spending and upcoming goals.

- **Review previous budgets and fundraising reports**
- **Use a shared online spreadsheet for collaboration**
- **Prioritize school needs and planned events**
- **Transfer and review financial software access**
  - **Ex: MoneyMinder, QuickBooks, etc.**

REVIEW + PLAN FUNDRAISERS:

Look at past fundraiser performance to help guide fall planning.

- **Review participation, profits, and family feedback**
- **Set realistic fundraising goals for the year**
- **Brainstorm new fundraiser ideas or community partnerships**
- **Decide what worked and what didn't work in the past**

BUILD A FUNDRAISING + EVENTS CALENDAR:

Map out major PTO/A events early to avoid scheduling conflicts.

- **Create a yearly calendar for board and general meetings**
- **Include fundraisers, school events, school breaks, holidays, and community events**
- **Decide which meetings will be virtual or in-person and who needs to attend**
- **Share calendar with school administration**
- **Use Google Calendar or another shared calendar tool for easy accessibility**

PLAN A BACK-TO-SCHOOL WELCOME:

Create an opportunity for families to connect with the PTO/A.

- **Set up a PTO/A welcome table/booth at registration or orientation**
- **Partner with the school for a first-day or first-week event**
- **Introduce board members and share upcoming plans**
- **Collect emails and recruit volunteers early**

JULY/AUGUST: START BACK-TO-SCHOOL PREP



OUTREACH + COMMUNICATION:

Prepare communication tools and materials before school starts.

- **Update social media pages and websites**
- **Prepare back-to-school announcements or newsletters**
- **Partner with school office to include PTO/A info in all summer mailers and emails**

VOLUNTEER RECRUITMENT STRATEGY:

Create a simple system for recruiting and organizing volunteers.

- **Promote volunteer opportunities through email and social media**
- **Offer both small and large volunteer roles**
- **Create different volunteer interest groups or committees**
- **Use online sign-up platforms to simplify communication**

PREPARE WELCOME MATERIALS:

Give families easy access to PTO/A information and opportunities.

- **Include meeting dates, volunteer opportunities, and contact info**
- **Offer printed information packets or digital downloads**
- **Include QR codes or URLs to important links**
- **Include a short "Ways to Get Involved" section**
- **Have easy access to event calendar for the year**
- **Share a sneak peek of the year's biggest events/fundraisers**

HOST YOUR BACK-TO-SCHOOL WELCOME:

Make your PTO/A visible and welcoming as families return to campus.

- **Offer small giveaways, snacks, or kid-friendly activities**
- **Have board members available to answer questions**
- **Promote upcoming meetings and events**
- **Encourage families to join email lists or volunteer groups**
- **Collect quick feedback: "What do you want PTO/A to focus on this year?"**

REMINDER!

Every school community is unique and has different goals. Adjust this checklist to fit your needs based on what fits your school best!

Planning early creates stronger communication, better organization, and a more connected school community!

HERE'S TO A SUCCESSFUL SCHOOL YEAR AHEAD!



EVERYTHING YOUR FUNDRAISER NEEDS.

While you're planning, check out FundHub! The all-in-one event management and donation platform. Everything you need to plan, promote, and crush your next fundraiser. **No spreadsheets required.**

1,200+ 5 -STAR GOOGLE REVIEWS! ★★★★★



Student Donation Pages → More Donations

Real-time Dashboards → Simple Management

Personal Event Coach → Expert Guidance

+ SO MUCH MORE!