**End of the Year Local Unit Checklist**

The following checklist items are due by June 30th unless otherwise specified

Most items can be submitted online into your Memberhub account.

As always, the VP of Regions and Field Service Representatives are always available for questions and/or assistance or you may send your questions directly to [admin@delawarepta.org](mailto:admin@delawarepta.org)

Outgoing officers:

* Create a summer budget and have it approved by the membership at the last PTA meeting in order to spend money between July 1st and the first PTA meeting of the next school year.
* Enter new officers for the upcoming school year in the Memberhub account.
* Pay final membership dues to the state for the ending school year.
* Complete & submit the end of year financial reporting form and audit (as soon as possible – should be done before school starts) and upload to Memberhub account

Incoming officers:

* Meet with outgoing officers before the end of the school year and get all books/records, online account information and necessary procedure information.
* Change account signers at the bank, if necessary. Take the minutes that show the election of new officers to the bank.
  + Note: If opening a new bank account, a bank letter from State PTA, a copy of bylaws and minute showing the election of current account signers will be required.
* Verify you have a completed IRS Tax Authorization Form 8821 in your MemberHub account
* Verify that your local unit bylaws are current (approved within the last 5 years)
* Set a date for new officers to meet to begin back to school planning
* Ensure new officers have registered for an upcoming Leadership Training
* Check National PTA and Delaware PTA websites and Facebook frequently for updates and information on Local PTA Leader Kits, grants and awards
* Check date that insurance needs to be renewed.