

## Checklist 1 [July – November]: Council and OOC Unit Leader Checklist

Submit each completed checklist to [Help@23rdDistrict.org](mailto:Help@23rdDistrict.org) to receive #MagicMaker recognition for 2024 – 2025!

Month	Day		Subject	Send Via	STATUS
Monthly		<input type="checkbox"/>	<b>Remit Dues:</b> August <input type="checkbox"/> September <input type="checkbox"/> October <input type="checkbox"/> November <input type="checkbox"/>	Channels/Totem	Required
Monthly		<input type="checkbox"/>	<b>CAPTA Webinar Opportunities:</b> Aug <input type="checkbox"/> Sep <input type="checkbox"/> Oct <input type="checkbox"/> Nov <input type="checkbox"/>	Virtual	Recommended
<b>First Association Meeting</b>		<input type="checkbox"/>	<b>Did You:</b> <input type="checkbox"/> Present: Annual Report <input type="checkbox"/> Adopt: Audit/Budget/Calendar/Fundraisers/Programs	Upload to MyPTEZ or Send Via Channels	Required
<b>July</b>		<input type="checkbox"/>	<b>Did You:</b> <input type="checkbox"/> Attend the 23 <sup>rd</sup> District Board Meeting? <input type="checkbox"/> Attend Training? <input type="checkbox"/> Confirm all officer contact information is in MyPTEZ? (U/C) <input type="checkbox"/> Update unit leaders and account owner in TOTEM? <input type="checkbox"/> Review bylaws with the board? <input type="checkbox"/> Submit financial records for year-end audit? <input type="checkbox"/> Launch a Membership Campaign?		
<b>August</b>		<input type="checkbox"/>	<b>Did You:</b> <input type="checkbox"/> Attend the 23 <sup>rd</sup> District <b>General Association</b> Meeting? <input type="checkbox"/> Encourage your units to attend? <input type="checkbox"/> Participate in 23 <sup>rd</sup> District PTA membership challenges?		
<b>September</b>		<input type="checkbox"/>	<b>Did You:</b> <input type="checkbox"/> Attend the 23 <sup>rd</sup> District Board Meeting? <input type="checkbox"/> Participate in 23 <sup>rd</sup> District PTA membership challenges? <input type="checkbox"/> Receive and share information on 23 <sup>rd</sup> District PTA programs? [Grant opportunities, etc.] <input type="checkbox"/> Submit for California State PTA grant opportunities?		
<b>October</b>		<input type="checkbox"/>	<b>Did You:</b> <input type="checkbox"/> Attend the 23 <sup>rd</sup> District Board Meeting? <input type="checkbox"/> Connect with 23 <sup>rd</sup> District for help/support as needed? <input type="checkbox"/> Confirm all units have leadership/membership (15 memberships minimum) (U/C)? <input type="checkbox"/> Apply for a <b>California State PTA</b> scholarship? <i>(Deadline: October 15)</i>		
<b>November</b>		<input type="checkbox"/>	<b>Did You:</b> <input type="checkbox"/> Attend the 23 <sup>rd</sup> District Board Meeting? <input type="checkbox"/> Confirm all units have leadership/membership (15 memberships minimum) in your Council?		

**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 12** – Reflections entries due to 23<sup>rd</sup> District PTA  
**INSURANCE PREMIUMS DUE AND PAYABLE TO AIM INSURANCE DIRECTLY!**