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## Supplemental Business Checklist

The following checklist is meant as a guide to help take a state constituent association towards running a successful business. These items are not required to be submitted, but it is encouraged to share them with your NSR and possibly submit for the resource bank for other states to view.

These policies, plans and business practices are only as useful as the amount of work that may go into maintaining and sustaining them. The entire board of directors should be involved in creating these plans and policies.

- ☒ Adhere to state laws applicable to nonprofit corporations.
- ☒ Have access to a nonprofit attorney and a certified parliamentarian.
- ☒ Adopt written policies for fiscal management and accountability.
- ☒ Adopt written policy for personnel management, if applicable.
- ☒ Adopt written policy for unit affiliation within the state congress.
- ☒ Adopt written guidelines for effective communication.
- ☒ Follow adopted bylaws, especially in regard to required actions such as meeting, communications, approvals, etc.
- ☒ Maintain organizational and legal documents supporting the nonprofit status and charter including IRS filings, state filings and National PTA charter.
- ☒ Adopt a strategic plan (typically a three to five year plan).
- ☒ Adopt a membership extension plan (may be part of the strategic plan).
- ☒ Adopt a diversity and inclusion plan (may be part of the strategic plan).
- ☒ Adopt a legislative and advocacy plan including annual/term priorities (may be part of the strategic plan).

The National Service Representatives (NSRs) are available to help answer questions and direct you to applicable resources.