

President's Calendar/Checklist of What to do now

The calendar/checklist below is designed to help guide you through a successful term as president.

WHAT TO DO AFTER YOUR ELECTION

- Verify that the outgoing Secretary has entered 2011-2012 officers online.
- Register for LTC/Leadership Training Conference, July 15-16 <http://vapta.org/ltc/ltc.html> where the board will attend workshops for comprehensive training, resources and tools; hear innovative and motivating workshop presenters; share ideas and concerns with members throughout the state.
- Change the signers on the PTA's bank account as soon as the school year ends.
- Become acquainted with your local unit bylaws - Officer's terms, elections, duties, membership dues, nominating committee, meetings, fiscal year, etc. Regardless of gross income, your PTA must file a 990 by the 15th day of the 5th month following the close of your 2010-2011 fiscal year.
- Make sure 2010-11 audit is complete and mailed to the state office.
- Meet with your principal to learn about the school's goals and share your objectives for PTA. Establish a good working relationship right from the start.
- With Executive Committee, (President, Vice President(s), Secretary, Treasurer, Principal), identify what committees you will need to accomplish your goals and appoint committee chairpersons. **Be sure to appoint a representative to the CCPTA.**
- Plan your budget, calendar & membership campaign. Membership Cards - Attendees of Leadership Training Conference (LTC) will receive 2011-2012 Membership Cards. (You may only pick up cards if the unit is in good standing.) The state office will mail out any cards not picked up after LTC.
- Locate and identify all leadership resources and tools. Look at the past president's procedure book and files as well as state and national PTA resources provided online. Make the website your primary source of informational resources and current announcements. Visit this website regularly.
 - Most leadership resources can be found in the PTA Committees sections of the website. For specifics on officer positions, visit each committee page.
 - Check out the Library: Forms and Documents section for downloads of everything you need to run your unit.
 - Announcements and activity/event Information can be found of the website homepage.
 - Check out the calendar, shown on the right side of the homepage, for dates to remember.

PTA PRESIDENT'S TIMELINE

MAY

- Honor teachers during Teacher Appreciation Week.
- Hold the Election Meeting and start the process again.
- General Membership Meeting for election of officers and installation ceremony.
- Meet with outgoing president for briefing.
- Meet with Executive Committee.
- Arrange to meet with Principal.
- Look for the Incoming President Packet from the State Office.
- Remind Treasurer that Final Membership remittance due to State by **June 30**

JUNE

- Have transitional board meeting with old and new members.
- Assume duties at end of transitional meeting.
- Enter 2011-2012 Officer information online at www.vapta.org by **June 15th**. EIN (tax ID) number must also be on file with state PTA office.
- Review and update committee procedure books, develop procedure books for new positions.
- Make sure the outgoing president arranged the audit for the previous year financial records.
- Send names/addresses of officers to your School Board to receive mailings.
- Make reservations for Virginia PTA's Leadership Training Conference and Virginia PTA's Legislation/Education Conference **July 15-16**.
- Remind your Treasurer that all dues collected since March 1 must be in to the State Office by **June 30**.

JULY

- Attend Virginia PTA's Leadership Training Conference and Virginia PTA's Legislation/Education Conference **July 15-16**.
- Budget Committee meets to develop next year's budget and prepares to present it to the Executive Board before going before the General Membership for final approval.
- Confirm with the principal when PTA information needs to be available for the school's Welcome Back Packets.

AUGUST

- Hold a meeting of the Executive Committee to go over the plans of work and schedule for next year.
- Hold a meeting of the Executive Board to go over all action items and approve the budget that will be presented to the General Membership.
- Look for **membership cards from Virginia PTA** to be mailed to you, based on last year's membership.
- PTA should have received PTA Quick Reference Guides.
- Look for and share mailings from National, State, District, and Council with your board.
- Prepare an article for your newsletter and Welcome Back Packet

SEPTEMBER

- Make sure the Membership Committee has all the information and cards needed for a successful membership campaign.
- Make sure the Reflections Chair has all the information for a successful Reflections Program. Begin **Reflections Program 2011-12 Theme, "Diversity Means"**

- Hold first General Membership meeting and vote on the proposed PTA Budget, adopt the fiscal year-end audit and send copy of audit to state PTA office. If required to file 990 with IRS, a copy of 990 form must also be forwarded to state PTA office.
- Have board members attend Council, District, or Region Leadership Training Workshops.

OCTOBER

- Choose delegates to attend Virginia PTA's Convention and send in the registration.
- Hold a Legislation Meeting to have your general membership vote on Virginia PTA's Proposed Legislation Program and send the tally sheet to your District Director.
- Reflections Reminders

NOVEMBER

- Attend Virginia PTA's Convention.
- Remind your Treasurer that all dues (National \$1.75 and State \$1.00) must be sent to the State Office by **December 1** so your Local Unit remains in "Good Standing".
- Remind your Treasurer that CCPTA dues December 1 (.25)
- Watch for Reflections Deadline

DECEMBER

- Enjoy the holidays and rejuvenate yourself for the remainder of the year.
- Council, State and National Dues – **December 1st**

JANUARY

- Make reservations for Virginia PTA's sponsored PTA Day at the General Assembly.
- Advertise the need for members to serve on the Nominating Committee.

FEBRUARY

- Elect your Nominating Committee.
- Ask your Executive Board to let the Nominating Committee know of their intentions for the coming year.
- Attend Virginia PTA's PTA Day at the General Assembly (may be held in January).
- Remind your Treasurer that all dues collected since December 1 must be in to the State Office by **March 1**.

MARCH

- Review your PTA budget.
- Arrange for the Audit of the books when they close at the end of the fiscal year.
- Attend your District's Annual Meeting (may be held in April).
- Have the Nominating Committee report the slate of officers to the executive board (may be done in April).
- Remind board members to update their procedure books and include any recommendations for next year.

APRIL

- Recognize outstanding contributors to the PTA by giving them one of Virginia PTA's Honorary Awards.
- Honor all PTA Volunteers.
- Attend the District Legislation Meeting.