

# PTA/PTSA Leaders' Calendar and Checklist

This calendar/checklist is designed to help guide PTA/PTSA leaders through a successful term.  
Review this as you set your goals, programs and budget.

## AUGUST

- ✓ 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. Be sure to include Annual Conference to be held July 13 – 15, 2017 in Richmond.
- ✓ Meet with the principal to go over goals, plans and projects. Confirm when PTA information needs to be available for the school's Welcome Back Packets.
- ✓ Hold a meeting of the executive committee to set goals, committees and schedule for the year.
- ✓ Hold a meeting of the executive board to go over programs, projects and approve the budget.
- ✓ Look for and share mailings from national, state, district and council.
- ✓ Revise and set up your website, newsletter and other communications strategies.
- ✓ Set dates for your meetings and send calendar of events to your membership.
- ✓ Set dates for your newsletter. Let board know their deadlines to send in their articles.
- ✓ Register for National PTA's Back to School Kit at [www.ptakit.org](http://www.ptakit.org).

## SEPTEMBER

- ✓ Make sure the Membership Committee has all the information and cards needed for a successful membership campaign. Remember, state and national portion of dues are \$3.75.
- ✓ Make sure the Reflections Committee has all the information for a successful Reflections Program.
- ✓ Share information on Virginia PTA's Power Plates program.
- ✓ 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. A copy of 990 forms must also be forwarded to state PTA office.
- ✓ Have board members attend council, district, or region leadership training workshops.

## OCTOBER

- ✓ Hold a legislation meeting to have your general membership vote on Virginia PTA's Proposed Legislation Program and send the tally sheet of votes to your council or district director. This can be done during your regular membership meeting.

## NOVEMBER

- ✓ Remind your Treasurer that all dues must be postmarked and sent to the State Office before or by December 1 so your Local Unit remains in "Good Standing".
- ✓ Check to see if your 990 is due to the IRS. This depends on date IRS has as your fiscal year.

## DECEMBER

- ✓ Review your goals, programs and budget to see if they need revising.
- ✓ Determine late-month availability of key people; communicate availability of key officers.
- ✓ Enjoy the holidays and rejuvenate for the remainder of the year.

## JANUARY

- ✓ Make appointments with your representatives for Virginia PTA's PTA Day at the General Assembly on January 30, 2017.
- ✓ Attend PTA Day January 30 (training, January 29 at Comfort Suites, Glen Allen).
- ✓ Advertise for members willing to serve on the nominating committee.

## FEBRUARY

- ✓ Elect nominating committee (check your bylaws to see when and how this election takes place.)
- ✓ Ask the executive board to let the nominating committee know of their intentions for the new PTA year.
- ✓ Remind treasurer that all dues collected since Dec. 1 must be in to the state office by March 1.

## MARCH

- ✓ Review PTA budget. Register for Annual Conference at Early Bird rate.
- ✓ Arrange auditing the books when they close at the end of the fiscal year.
- ✓ Attend district's annual meeting (may be held in April).
- ✓ Have the nominating committee report the slate of proposed officers as stated in bylaws.
- ✓ Remind board members to update procedure books and include recommendations.
- ✓ Nominate your principal or superintendent for Virginia PTA's Power Partners Award.

## APRIL

- ✓ Recognize outstanding supporters by giving them Virginia PTA's Honorary Service Awards.
- ✓ Honor all PTA volunteers. Send local Volunteer of the Year nominations to councils or districts for state consideration.
- ✓ Look for next year's Reflections theme to share with your students.

## MAY

- ✓ Observe Teacher Appreciation Week, May 1 – 5, 2017.
- ✓ General membership meeting to elect and/or install officers (May happen in June)
- ✓ Meet with outgoing president for briefing.
- ✓ Meet with Executive Committee.
- ✓ Arrange to meet with principal.
- ✓ Look for the Incoming Local Unit Leaders Packet from the state office.

## JUNE

- ✓ Have transitional board meeting with old and new members.
- ✓ Send all forms including the Local Unit/Council Officers' Contact Information to the state PTA office. 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 audit for the previous year financial records is arranged.
- ✓ Send names/addresses of officers to your school board to receive mailings.
- ✓ Send all dues collected since March 1 in to the state office by June 30.
- ✓ Confirm your Reflections deadline set by your council or district so your Reflections chair can set your deadline for your students.

## JULY

- ✓ Attend Virginia PTA Leadership Training and Annual Conference July 13 – 15, 2017 at Richmond Marriott – Downtown.