PRESIDENT'S CALENDAR/CHECKLIST

This calendar/checklist is designed to help guide presidents through a successful term. Your Council will provide more specific detail on responsibilities in your area.

JUNE

- Have transitional board meeting with old and new members.
- Assume duties at time prescribed in your bylaws.
- Send all forms including the new officer names/addresses to the state PTA office and to the York County Council.
- 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.
- Attend local training and state training…great networking opportunities!
- Remind your outgoing treasurer that all dues collected since March 1 must be in to the state office by June 30.

JULY

- Attend Virginia PTA's Annual Meeting and Leadership Training in Richmond.
- 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. Must be posted 30 days prior to vote.
- Meet with Principal to discuss the upcoming year's goals and objectives so PTA and school can work in concert. Understand school procedure for PTA approval and communication.
- 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.
- Plan fundraisers as needed making sure to comply with 3 to 1 rule of fundraisers vs. programs.
- 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.
- Download the membership cards template from the Virginia PTA web site and print cards.
- Look for and share mailings from national, state, district and council with your board.
- Prepare membership and welcome forms to be included in Welcome Back Packet.
- Plan welcome back event for staff to introduce yourself and board. Encourage 100% staff membership.

SEPTEMBER

- Make sure the Membership Committee has all the information and cards needed for a successful membership campaign.
- Make sure the Reflections Committee has all the information for a successful Reflections 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 and York County PTA. A copy of 990 forms must also be forwarded to state PTA office.
- Be sure to include York County PTA Council meetings on your calendar.
- Begin communicating immediately via social media and email with members as they join.

OCTOBER

- Have your general membership vote on Virginia PTA's Proposed Legislation Program and send the tally sheet of votes to your district director. York County does this via electronic survey and will send you the link to send to membership emails.

NOVEMBER

- Remind your Treasurer that all dues must be postmarked and sent to the State Office by December 1 so your Local Unit remains in “Good Standing”.

DECEMBER

- Establish second-half of the year schedule and make sure that the budget is appropriate based on the success of fundraisers.
- Enjoy the holidays and rejuvenate for the remainder of the year.

JANUARY

- Make reservations for Virginia PTA’s PTA Day at the General Assembly.
- Advertise for members willing to serve on the nominating committee.

FEBRUARY

- Elect nominating committee (check local PTA 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.
- Nominating committee should be recruiting new volunteers for open board and chair positions.
- Submit volunteer of the year and principal of the year nominations to York County PTA.

MARCH

- Review PTA budget to make sure you will have appropriate carryover for the following year.
- Arrange auditing the books when they close at the end of the fiscal year.
- Attend Peninsula District’s annual meeting (may be held in April).
- Have the nominating committee report the slate of proposed officers to the executive board (check local unit bylaws to determine when this report should be presented).
- Remind board members to update procedure books and, especially, include recommendations for next year.

APRIL

- Recognize outstanding supporters by giving them Virginia PTA Awards found at www.vapta.org
- Honor all PTA volunteers. Send local Volunteer of the Year nominations to councils or districts for state consideration.

MAY

- Observe Teacher Appreciation Week. Be sure to recognize custodians and cafeteria workers as well this week!
- General membership meeting to elect and/or install officers.
- Meet with outgoing president for briefing.
- Meet with Executive Committee.
- Look for the Incoming President’s Packet from the state office.