PRESIDENT'S CALENDAR CHECKLIST
2020-2021

This calendar/checklist is designed to help guide presidents through a successful term.

June

- Have transitional board meeting with old and new members.
- Assume duties at time prescribed in your bylaws.
- Send all forms including the new officers' names/addresses 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 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
- Remind your outgoing treasurer that all dues collected since March 1 must be in to the state office by June 30.

July

- Visit www.vapta.org under Events to learn about upcoming Leadership Training schedule
- 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 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 card template needed for a successful membership campaign.
- Make sure the Reflections Committee has all the information for a successful Reflections Program. Go to www.vapta.org and under Programs tab you can find program details.
- 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.

November

- Remind your treasurer that all dues must be postmarked and sent to the State Office by November 1 so your Local Unit remains in "Good Standing".

December

- Establish dates for January newsletter deadlines (including submissions, editing, approvals & publishing)
- 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 reservations for Virginia PTA's PTA Advocacy Day at the General Assembly.
- Advertise for members willing to serve on the nominating committee.
- Attend Virginia PTA Advocacy Day (may be held in February.)

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 Nov. 1 must be in to the state office by March 1.

March

- Review PTA budget and make amendments as necessary.
- 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 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's Honorary Service Awards.
- Honor all PTA volunteers. Send local Volunteer of the Year nominations to councils or districts for state consideration.
- Attend the district legislation meeting.