

Sixth District PTA

PTA Calendar

of

Essential Requirements

President-Elect/Board-Elect

## President-Elect Calendar

*This calendar is a guideline based on units that have their election of officers in March and hold an association meeting in May or June. Please look at your unit's PTA calendar and bylaws and adapt as necessary.*

### April

- \_\_\_\_\_ Work with current president to develop transition plan so you can start learning your job.  
Example: When will the current board and the board-elect officers be getting together to exchange information?
- \_\_\_\_\_ View and/or download Toolkit from [capta.org](http://capta.org).
- \_\_\_\_\_ Provide each officer with their section of the Toolkit and related forms.
- \_\_\_\_\_ Set date for first board-elect meeting and send out invitation. You can hold this off-campus; allow people time to meet and get to know each other.
- \_\_\_\_\_ Meet with school principal before meeting with board-elect to hear his/her vision for the next school year.
- \_\_\_\_\_ Confirm that all officers, appointed positions, chairs are PTA members.
- \_\_\_\_\_ Using the bylaws, review current chairman positions and any open, unfilled officer or appointed positions.
  - \_\_\_\_\_ Determine what PTA jobs haven't been filled.
  - \_\_\_\_\_ Decide which are needed.
  - \_\_\_\_\_ Ask for suggestions to fill the positions.
    - Start recruiting chairmen and committee members for open positions.
    - Have a balance of experienced and new members.
    - First fill those positions whose work begins immediately:  
Membership, budget/finance, and program.
- \_\_\_\_\_ Hold first board-elect meeting (may take more than one meeting).
  - \_\_\_\_\_ Ratify appointed officers (parliamentarian and any other appointed officers as specified in the bylaws) and chairs and elect to fill any open elective officer positions.  
[Need to do a MOTION]
  - \_\_\_\_\_ President-elect appoints budget committee. The treasurer-elect chairs the budget committee.  
[Need to do a MOTION]
  - \_\_\_\_\_ Make plans for coming year.
    - Establish unit goals for next year.
      - Review current year's goals and activities. Review school goals.
      - Decide which activities to keep, to change, and to eliminate.
      - Decide on any new activities to try.
      - NOTE: Review the red, yellow, and green pages of the Insurance and Loss Prevention guide when planning activities and events.
  - \_\_\_\_\_ Make sure all activities (programs, events, and fundraising) comply with insurance requirements (see insurance manual –green, yellow, and red pages).

- \_\_\_\_\_ Provide executive board with a list of names of volunteers that are under each position, including contact information. This information may be provided by the nominating committee.
- \_\_\_\_\_ Make sure treasurer-elect schedules budget committee meeting with principal and budget committee.
- \_\_\_\_\_ Consider using PTAEZ™ for the financial records of the unit.
- \_\_\_\_\_ Encourage new and continuing officers to attend training (6<sup>th</sup> District, CAPTA, or council) and provide dates.
  
- \_\_\_\_\_ Find out when materials for the Back-to-School packets are due to the school office (check with principal or school secretary).
  
- \_\_\_\_\_ Set board expectations, protocols, and norms concerning procedures:
  - \_\_\_\_\_ What to expect if an officer cannot attend a meeting.
  - \_\_\_\_\_ Treasurer needs to review and teach how to use the cash verification form and the Payment Authorization Form.
    - \_\_\_\_\_ When reimbursement requests are due.
  - \_\_\_\_\_ Expectations for working together as a board.
  - \_\_\_\_\_ If an officer is going to miss a meeting, he or she must send a written report.
  
- \_\_\_\_\_ Ensure treasurer-elect sends out current year budget to executive board-elect. Ask that the executive board-elect review the information. Provide two weeks for them to review, ask questions, and respond to the budget committee with their requested budget. This is a preliminary request which the budget committee will use to continue refining the budget during the summer.
  
- \_\_\_\_\_ Fill vacant positions.
  
- \_\_\_\_\_ Check with current president to get information about council meeting and training dates.
  
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## President-Elect Calendar

### Early May

- \_\_\_\_\_ Check for any items not finished in the previous month.
  
- \_\_\_\_\_ Confirm that the current president has forwarded roster with names, addresses, and email addresses of the board-elect to council or Sixth District. Request a copy.
  
- \_\_\_\_\_ Attend training and send board-elect and chairs [work with your council or Sixth District to pick classes]. Check the Sixth District website ([www.capta6.org](http://www.capta6.org)) for updated information.
  - \_\_\_\_\_ CA State PTA Convention
    - 2014 - May 7 – 10 (Los Angeles)
    - 2015 – April 30 – May 3 (Sacramento)
  - Attend convention orientation meeting.
  - NOTE: If president-elect goes to convention he/she is a delegate for the unit.
- \_\_\_\_\_ President and board-elect attend Sixth District training in May. Sixth District training is also available in August; however, training for President, Secretary, Treasurer, Membership, and Reflections is recommended in spring.
  - Spring Leadership Training, Sat, May 3, 8:30 am – 2:00 pm
  - Fall Leadership Training, August 2014
- \_\_\_\_\_ If your council provides training, the board-elect should plan to attend that training also.
  
- \_\_\_\_\_ Budget Committee prepares preliminary budget and sends to executive board for review. After review is completed, treasurer-elect posts preliminary budget at least 10 days association meeting.
  
- \_\_\_\_\_ Preliminary budget is presented and approved at last association meeting by the treasurer-elect on behalf of the board-elect. Need a MOTION for preliminary approval of next year's budget or MOTION authorizing the executive board to pay necessary bills during the summer “up to x dollars” for summer and school year start-up expenses.
  
- \_\_\_\_\_ Conduct new officer installation at May/June final association or executive board meeting. President-elect decides who will perform installation of incoming officers.
  
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## President-Elect Calendar

### Late May/Early June

- \_\_\_\_\_ Check for any items not finished in the previous month.
  
- \_\_\_\_\_ Work with current president to make sure that incoming board and chairs  
\_\_\_\_\_ are working and meeting with the current officers;  
\_\_\_\_\_ receive procedure books and materials from predecessors.
  
- \_\_\_\_\_ Identify what activities are going to be needed at the start of school and meet with officers, chairpersons and committees.  
Examples:  
-Meet with room parent coordinator (and principal) to plan orientation meeting for room representatives.  
-Back-to-school event.
  
- \_\_\_\_\_ Plan the membership drive (fall and ongoing).
  
- \_\_\_\_\_ On [capta.org](http://capta.org) website, check out The Communicator under the Running Your PTA tab>Communication (great resource for ideas for running your PTA and flyers for your parents).
  
- \_\_\_\_\_ The Board-elect needs to review the current bylaws and standing rules. If revisions are necessary decide if a need exists to appoint a committee to revise them.  
NOTE: If no changes are necessary but the bylaws are three years old they must be updated and be submitted to CA State PTA (through channels) for approval.
  
- \_\_\_\_\_ Work with committees in charge of activities scheduled before school begins:

Membership	Fall fundraisers
Welcome activity	Fall programs
President's Letter	
  
- \_\_\_\_\_ Prepare PTA master calendar (review school and district calendars to avoid conflict):
  - Executive Board Meetings
  - Association Meeting
  - PTA Special Events
  - President/Principal monthly meetings
  - Parent Ed Nights
  - Community building events
  
- \_\_\_\_\_ Meet with principal and do the following:
  - Verify PTA calendar dates work with school calendar and make any necessary modifications.
  - If PTA is involved with preparation of the back-to-school packet, agree on date and times for packet assembly, labeling and pick-up and who will be involved.
  - Agree on distribution process for "Welcome New Families" letter and deadline for submitting it.
  - If your school has a School/Parent Handbook, review it and confirm due date for edits to PTA section.

## President-Elect Calendar

### June

- \_\_\_\_\_ Check for any items not finished in the previous month.
- \_\_\_\_\_ Receive and review the procedure book and materials with current president.
- \_\_\_\_\_ Make sure all officers and chairs have met or are scheduled to meet with their respective outgoing person.
- \_\_\_\_\_ Make sure all officers and chairs have received their procedure book (or files) from the outgoing officer or chair.
- \_\_\_\_\_ Check with officers and chairs regarding how they will implement their plans for the year.
- \_\_\_\_\_ Check with chairs to make sure they do the following:
  - \_\_\_\_\_ Send PTA calendar dates to volunteers.
  - \_\_\_\_\_ Solicit budget needs or corrections form volunteers.
  - \_\_\_\_\_ Request any proposed budget modifications by July 31<sup>st</sup>. Any additions or deletions in events, programs or fundraisers need to be reported to the treasurer-elect.
  - \_\_\_\_\_ Advise chairs to contact the volunteer coordinator with any supporting volunteer positions that need to be added to the sign-up sheet for Back-to-School Night.
  - \_\_\_\_\_ Ensure that committees that are responsible for events and activities early in the school year are up and running and understand resources and responsibilities.
- \_\_\_\_\_ Make sure that every member of the board-elect has a copy of the current bylaws. Review current bylaws with board-elect and determine if any revisions are required. If so, appoint a committee to revise them.
- \_\_\_\_\_ Turn in roster for next year's board to council and if out-of-council to Sixth District if you did not do it in May.
- \_\_\_\_\_ Have Webmaster update website calendar, including back-to-school pick-up information and supply list.
- \_\_\_\_\_ Budget-elect committee continues to meet to revise budget as needed during the summer.
- \_\_\_\_\_ Switch from President-Elect Calendar to President Calendar/Task List/To Do's for current year.
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## Resources

(Note CA State PTA is in the process of updating their website so some links may change)

### California State PTA\*

Website: [www.capta.org](http://www.capta.org)

Toolkit – Comprehensive manual in English or Spanish available on website, CD and in hard copy.

The Communicator – Information sheets ready to copy and use, available on the CAPTA website:

[www.capta.org/sections/communication/communicator.cfm](http://www.capta.org/sections/communication/communicator.cfm)

Pocket Pals (English and Spanish) – Education, Finance, Leadership, Membership, Parent Involvement.  
Healthcare

Summer mailing sent to home address of unit president.

### Sixth District PTA\*

Website: [www.capta6.org](http://www.capta6.org)

Trainings: Spring Leadership Training – May

Fall Leadership Training – August

Monthly Trainings – schedule to be announced for fall classes

Sixth District Office: located in the library of the Santa Clara County Office of Education (SCCOE)

Address: 1290 Ridder Park Drive, M/C 214, San Jose, CA 95131

Phone: 408-453-6536

Email: [office@capta6.org](mailto:office@capta6.org)

### Councils (for units in councils)

Cupertino-Fremont-Sunnyvale

[CFcouncilpres@capta6.org](mailto:CFcouncilpres@capta6.org)

Evergreen Council

[EVcouncilpres@capta6.org](mailto:EVcouncilpres@capta6.org)

Los Altos- Mountain View Council

[LAMVcouncilpres@capta6.org](mailto:LAMVcouncilpres@capta6.org)

Milpitas Council

[MUcouncilpres@capta6.org](mailto:MUcouncilpres@capta6.org)

North Valley Council

[NVcouncilpres@capta6.org](mailto:NVcouncilpres@capta6.org)

Palo Alto Council

[PAcouncilpres@capta6.org](mailto:PAcouncilpres@capta6.org)

San Jose Unified Council

[SJcouncilpres@capta6.org](mailto:SJcouncilpres@capta6.org)

Santa Clara Council

[SCLcouncilpres@capta6.org](mailto:SCLcouncilpres@capta6.org)

### Out-of-Council Units

Sixth District Out-of-Council Chair

[oc-coordinator@capta6.org](mailto:oc-coordinator@capta6.org)

### National PTA\*

Website: [www.pta.org](http://www.pta.org)

Back to School Kit – Quick Reference Guides

\* All three websites have lots more information and resources available on their sites.