

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.
- _____ 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 have not been filled.
 - _____ Decide which jobs, new or continuing, 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 (Sixth District, CAPTA, or council) and provide dates.

- _____ 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) for updated information.
 - _____ CA State PTA Convention
 - 2019 – May 16 – May 18 (Monterey)
 - Attend Sixth District PTA 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 or June. Sixth District training is also available in the fall; however, training for President, Secretary, Treasurer, Membership, Parliamentarian and Reflections is recommended in the spring.
 - Spring Leadership Training, Sat, June, date & time tba
 - Fall Leadership Training, August/September 2019
 - _____ If your council provides training, the board-elect should plan to attend that training also.
 - _____ CAPTA will also be offering Regional Training in the Fall. For dates, check capta.org.

- _____ 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 at least 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.

- _____ _____
- _____ _____

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.

- _____ 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 before the 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.

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).

- _____ Check the capta.org website, Running Your PTA tab>Tips for Leaders

- _____ 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 from volunteers.
 - _____ Request any proposed budget modifications by July 31st. 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 it was not done 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.
- _____ _____
- _____ _____

Resources

California State PTA*

Website: www.capta.org

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

Pocket Pals (English and Spanish) – Finance and Leadership

Summer mailing sent to home address of unit president.

Sixth District PTA*

Website: www.capta6.org

Trainings: Spring Leadership Training – May/June

Fall Leadership Training – August/September

Monthly Trainings – please check website and newsletter for information

Sixth District PTA Office: located in 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@mail.capta6.org

Councils (for units in councils)

Cupertino-Fremont-Sunnyvale

cfs@mail.capta6.org

Evergreen Council

evergreen@mail.capta6.org

Los Altos- Mountain View Council

lamv@mail.capta6.org

Milpitas Council

milpitas@mail.capta6.org

Monterey Bay Council

Monterey@mail.capta6.org

North Valley Council

northvalley@mail.capta6.org

Palo Alto Council

paloalto@mail.capta6.org

San Jose Unified Council

sanjose@mail.capta6.org

Santa Clara Council

santaclara@mail.capta6.org

Out-of-Council Units

Sixth District Out-of-Council Chair

ooc@mail.capta6.org

National PTA*

Website: www.pta.org

Back to School Kit – Quick Reference Guides

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