

President & Board of Directors Monthly To-Do List

Ongoing Duties

President

- ☐ Run monthly board and membership meetings.
- ☐ Attend monthly LWPTSA Council meetings (or find an alternate).
- ☐ Meet with your principal regularly.
- ☐ Sign checks (as needed) at request of the treasurer; check bank statements.
- ☐ Collaborate with the secretary to create meeting agendas.

All Board Members

- ☐ Attend monthly board and membership meetings.
- ☐ Prepare reports in a timely manner, in accordance with your PTA policy.
- ☐ Review financial statements.
- ☐ Read meeting minutes and offer corrections.
- ☐ Attend training.
- ☐ Be familiar with your responsibilities and follow them.
- ☐ Participate, help out, and communicate!

Monthly To-Do List

June (Duties for the coming year. See June at the end of this list for duties to close out the old year.)

President

- ☐ Schedule a summer board retreat and next year's membership meetings (fill out district building use forms).
- ☐ Meet with the school office staff to discuss policies, calendars, and back-to-school volunteer needs.
- ☐ Consider working on "first day packet" forms and documents before people leave for the summer.
- ☐ Communicate with the board members and chairs that need to get started in August to be ready. (Volunteer coordinator, membership chair, newsletter editors, webmaster, fundraising chairs, back-to-school event chairs, treasurer, etc.)
- ☐ Arrange with the principal to speak at a staff meeting before school starts. (inform them of grant options, classroom support, PTA programs)

Board

- ☐ Prepare for transition: all notebooks, funds, and supplies that belong to the PTSA should be given to the new officers by June 30.

- ☐ Corporation renewal is due in the anniversary month of when your PTSA was incorporated – check your legal documents and note the due date.

July (school office usually closed)

President (and selected others)

- ☐ Change bank account signers. Make appointment at your bank and verify their account signer process. You must bring the meeting minutes that recorded your election to the bank. Minutes or standing rules should also note which executives have signing privileges. (It is best practice to change signature cards after the financial review has been done so that the incoming treasurer takes control of reviewed books.)
- ☐ Read the NEW Washington State PTA Uniform Bylaws
- ☐ Review material to go in the first day packets. Do prep work, such as printing.
- ☐ Plan for back-to-school days in August, and round up volunteers.

August

President

- ☐ Update the calendar changes if necessary for general membership meetings, PTA activities for the year
- ☐ Speak at the August staff meeting. Introduce yourself, explain grants, reimbursement forms, and anything else teachers will need to know.

President and Board

- ☐ Hold your first board meeting/retreat. As a board, set goals, prepare for your first general meeting, review your budget and standing rules, and recommend these documents for approval at your first membership meeting; review “Best Practices” guidelines and Standards of Excellence form.
- ☐ Attend WSPTA Region 2 Back-to-School Conference; pick up your PTA’s “information sheet” (includes your PTA’s membership info, legal information, etc.). Forward the online WSPTA leadership packet information to all officers.
- ☐ Start membership drive and fundraising drive.

September

President and Board

- ☐ Hold executive committee or board meeting. Get ready for your first membership meeting.
- ☐ Participate in Curriculum Night (present about your PTSA to parents; consider having a PTSA table to promote PTSA activities and be seen.)
- ☐ Hold first membership meeting – re-approve your standing rules, goals, and/or budget. It helps to show membership the approved budget even if there are no changes since approved last spring.

- ☐ Make sure at least one elected officer attends PTA & the Law training. Get all board members trained.
- ☐ Start a membership drive if you haven't already; fees will be invoiced monthly by WSPTA via email and will be due upon receipt.
- ☐ Start promoting Reflections and get your chair trained.

October

President

- ☐ Register members to attend WSPTA Legislative Assembly.
- ☐ Scholarship basket theme due to LWPTSA Council.
- ☐ Complete and submit Standards of Affiliation to WSPTA

President and Board

- ☐ WSPTA Standards of Affiliation Agreement due October 31
- ☐ Begin search for possible nominating committee members
- ☐ Review your board structure for next year (changes in board structure need to be approved in standing rules before the nominating committee is elected)
- ☐ Update job descriptions for board positions
- ☐ Complete all board training by end of the month

Treasurer

- ☐ Send in LWPTSA Council scholarship assessment (\$100).

November

Treasurer

- ☐ Insurance payments due.
- ☐ Federal Taxes (990 or 990EZ) due
- ☐ Charitable Solicitations Renewal due.

Board

- ☐ Bring your scholarship basket to the LWPTSA Council meeting.
- ☐ Reflections entries due to LWPTSA Council.
- ☐ Elect a nominating committee at a membership meeting.

December

President

- ☐ Recruit a financial review team of 3-4 members; appointed by president and approved by the board.
- ☐ Consider a holiday party for the board/chairs; you are halfway through!

January

President and Board

- ☐ Attend WSPTA Focus Day.
- ☐ Conduct a mid-term financial review of books.
- ☐ Review Best Practices and Standards of Excellence forms—gather information for award binders.
- ☐ Attend district-wide Reflections reception.
- ☐ Elect a nominating committee at a membership meeting, if not done in November.

Treasurer

- ☐ 1099-MISC & 1096 due for vendors.

February

President

- ☐ If applying for a Standards of Excellence award, prepare your application form and mail before deadline.
- ☐ Apply for other WSPTA awards this month (100% membership, Honor Unit, etc. – check WSPTA website for awards and applications).
- ☐ Register for WSPTA Region 2 Mid-winter Conference.
- ☐ Attend Founders Day luncheon with your principal (consider inviting a valued staff member, plus your Reflections chair).
- ☐ Attend WSPTA Region 2 Mid-Winter Conference.

Treasurer

- ☐ Send in your budgeted LWCLC (levy committee) contribution.

March

Board

- ☐ Work with school to plan a Volunteer Appreciation event for May.
- ☐ Nominating committee completes search for next year's board by end of month. Proposed slate of officers must be publicly posted 15 days prior to the membership meeting.

Treasurer

- ☐ Treasurer recruits a budget committee to draft next year's budget (have committee approved by the board).

April

Board

- ☐ At April meeting, have your budget committee present the budget and have the board vote to recommend it to the membership at the next membership meeting.

- ☐ Elect new officers and approve budget (officers must be elected by April 30) at a membership meeting.
- ☐ Report new officers to WSPTA and Council. secretary@lwptsa.net
- ☐ Open nominations for WSPTA Golden Acorn and WSPTA Outstanding Educator to public.
President
- ☐ Encourage officers to attend WSPTA Convention (training counts for the following year's training requirement.)

May

President

- ☐ Work with Treasurer to set June deadlines for reimbursements and get word out to volunteers and school staff.
- ☐ Plan a transition meeting for outgoing and incoming board members in June.
- ☐ Recruit 3-4 members to conduct an end-of-year financial review after June 30. (Board should approve them).
- ☐ Award WSPTA Golden Acorn, Outstanding Educator and any other awards at a volunteer appreciation event.
- ☐ Work with board members (incoming and outgoing) to fill non-elected board and chair positions.
- ☐ Last membership meeting: approve budget, approve any changes in standing rules. Review the yearly goals and objectives set in September.

Incoming President

- ☐ Attend Presidents & Principals meeting (for incoming President.)

June

Board

- ☐ Prepare for transition: all notebooks, funds, and supplies that belong to the PTSA should be given to new officers before June 30.

Incoming and/or Outgoing President

- ☐ Schedule summer board retreat and next year's membership meetings (fill out district building use forms).
- ☐ Meet with school office staff to discuss policies, calendars and back-to-school volunteer needs.
- ☐ Print a hard copy of your membership roster and file with your permanent records.
- ☐ Congratulate yourself on a GREAT PTSA year! Providing strong leadership for a noble, vital mission with children at the center is important work. You are making the world a better place!

Membership Meetings

Suggested timeline for membership meetings (Note that not all schools hold 5 membership meetings. Look in your standing rules to see if that is addressed for your school, and adjust this calendar as needed.)

September

Re-approve your budget, standing rules and goals from the previous spring.

November

Vote in your nominating committee.

If you are going to make changes to the structure of your executive board, (i.e. make changes to the number of officers, add positions, etc.), vote in these changes to your standing rules before you vote in your nominating committee.

January

Vote in your nominating committee if you didn't in November.

March

Fifteen days prior to your election, you must publicly post the slate of proposed officers for the following school year. At the membership meeting, conduct your election.

May

Submit next year's budget and standing rules for approval. They should be re-approved at the September membership meeting.

Best Practices Checklist

Our PTA is child-focused and responsive to our members.

- ☐ Clearly defined goals have been established by our PTA and approved by the board of directors and/or membership.
- ☐ Programs and activities were developed to address those goals.
- ☐ Regular communication was provided to members concerning PTA issues and activities.
- ☐ Our PTA determined our members' needs.
- ☐ Our membership campaign is ongoing and welcomes all who seek to join and participate.
- ☐ Meetings are held to address the needs of the membership and conduct the business of the association.
- ☐ Our volunteers are recognized.
- ☐ Our PTA identifies an outstanding volunteer in our community and honors him/her with a Golden Acorn Award annually.
- ☐ Our PTA annually identifies an outstanding school staff member and honors him/her with an Outstanding Educator Award.
- ☐ Our PTA annually identifies an outstanding child advocate in our community and honors him/her with an Outstanding Advocate award.

- ☐ Our PTA annually identifies an outstanding student advocate in our community and honors him/her with an Outstanding Student Advocate award.

Our PTA practices fiscal and fiduciary responsibility.

- ☐ Our PTA's budget was approved by the membership.
- ☐ A financial review was conducted of last year's books and records.
- ☐ Monthly financial reports are made to the board of directors and general membership.
- ☐ Our PTA's standing rules were updated and approved by the membership.
- ☐ The nominating committee was elected by the membership.
- ☐ Our PTA's officers were elected by the membership.
- ☐ Our PTA purchased insurance.
- ☐ Our PTA's board of directors held regular meetings.

Our PTA leaders are knowledgeable, involved and well trained.

- ☐ Our PTA leaders attended region conference or received "other WSPTA approved training" from a service delivery team member.
- ☐ Our PTA leaders attended PTA and the Law.
- ☐ Our PTA leaders attended legislative assembly.
- ☐ Our PTA leaders attended the last state PTA convention.
- ☐ Our PTA leaders will attend the next state PTA convention.
- ☐ Our PTA has a process to evaluate the current year's goals, programs, and activities.
- ☐ Our PTA shares information received from state and National PTA with our members.
- ☐ Our PTA has a process to pass materials and records on to next year's officers and committee chairs.
- ☐ Our PTA networks with others:
 - Council PTAs: by regular attendance and participation at council meetings and events.
 - Non-Council PTAs: by working with other PTAs and similar volunteer and service organizations.