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.

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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.

_____ 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:

<table>
<thead>
<tr>
<th>Membership</th>
<th>Fall fundraisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome activity</td>
<td>Fall programs</td>
</tr>
<tr>
<td>President’s Letter</td>
<td></td>
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</tbody>
</table>

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 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.

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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.