

PTA UNIT CHECKLIST

(Based on Traditional Calendar)

- April/May—New Slate of Officers Elected
- April/May—President-Elect meets with Principal regarding coming year
- April/May—President-Elect meets with/surveys teachers regarding coming year
- April/May—President-Elect begins recruiting committee chairs
- April/May—Volunteer Recognition Event and Installation of Officers
- April/May—Survey parents (approximately once every 2-3 years)
- May—Old Board-New Board Transitional Meeting
- June—Executive Committee Meeting
- June—Prepare for Audit
- June—Budget Planning
- June—Bylaws and Standing Rules Review
- June—Attend PTA Council New Officer Training
- June/July—Put together Committee Chair Informational Packets
- June—Records Retention Filing
- June—Meet with Principal regarding Activities Calendar for coming year
- June/July— First Board Meeting
- June/July—Executive Committee Meeting
- June/July—Update Unit Procedure Book
- June/July—Obtain Membership supplies from NC State PTA
- June/July—File for Merchant’s License if necessary
- July/August—Attend Summer Leadership Training sponsored by NC PTA
- July/August—NC PTA Unit Packet and membership cards arrive; read and prepare for distribution of information
- August—Welcome Back Teacher Breakfast/Lunch; outline PTA activity plan
- August—Meet Your Teacher Day/Orientation Membership Table, Volunteer Sign-ups
- August—Set up monthly meetings with Principal
- August—General Membership Meeting to present/approve budget
- August—Prepare Community Use of School Facilities form and submit to WCPSS
- August/September—PTA Membership Drive
- August/September—Meet with various committees
- September/October—Great Expectations Leadership Conference and Vendor Expo sponsored by PTA Council
- September—Pay Liability Insurance (AIM); due each October
- October—Pay PTA Council Dues
- October—Red Ribbon Week activities
- October—Candidates Forum
- December/January—Reflections deadline
- January—Nominating Committee formed
- February—Parent Involvement Conference sponsored by PTA Council
- March—Slate of Officers presented to board/membership
- March—Reflections Reception sponsored by PTA Council
- April—Evaluate budget for extra funds and determine use(s)
- April—Slate of Officers vote at General Membership Meeting; vote on use of extra PTA funds
- May—PTA Council Awards Program
- May—Project Graduation

PTA UNIT CHECKLIST

(Based on Year Round Calendar)

- April—New Slate of Officers Elected
- April/May—President-Elect meets with Principal regarding coming year
- April/May—President-Elect meets with/surveys teachers regarding coming year
- April/May—President-Elect begins recruiting committee chairs
- April/May—Volunteer Recognition Event and Installation of Officers
- April/May—Survey parents (approximately once every 2-3 years)
- May—Old Board-New Board Transitional Meeting
- May—Attend NC PTA Convention
- May—Attend PTA Council New Officer Training Program
- Late May/June—First Executive Committee Meeting
- June—Prepare for Audit
- June—Budget Planning
- June—Bylaws and Standing Rules Review
- June—File for Merchant's License, if necessary
- June—Put together Committee Chair Informational Packets
- June—Records Retention Filing
- June—Update Unit Procedure Book
- June—Meet with Principal regarding Activities Calendar for coming year
- June—Prepare Community Use of School Facilities forms and submit to WCPSS
- June—Obtain Membership supplies from NC PTA
- June— First Board Meeting
- June—Executive Committee Meeting
- June—Set up monthly meeting with Principal
- July—Welcome Back Teacher Breakfast/Lunch; outline PTA Activity Plan to Staff
- July—Meet Your Teacher Day/Orientation, Membership Table, Volunteer Sign-ups
- July/August—Attend Summer Leadership Training sponsored by NC PTA
- July/August—NC PTA Unit Packet and membership cards arrive; read and prepare for distribution of information
- July/August—Receive information from National PTA
- July/August/September—PTA Membership Drive
- July/August—Meet with various committees regarding their plans of work
- July/August—General Membership Meeting to present/approve budget
- September/October—Great Expectations Leadership Conference and Vendor Expo sponsored by PTA Council
- September—Pay Liability Insurance (AIM); due each October
- October—Pay PTA Council Dues
- October—Red Ribbon Week activities
- October—Candidates Forum
- December/January—Reflections deadline
- January—Nominating Committee formed
- January/February—Follow-up Training Programs for individual PTA Units sponsored by PTA Council
- February—Parent Involvement Conference sponsored by PTA Council
- March—Slate of Officers presented to board/membership
- March—Reflections Reception sponsored by PTA Council
- March—Evaluate budget for extra funds and determine use(s)
- April—Slate of Officers vote at General Membership Meeting; vote on use of extra PTA funds
- May—PTA Council Awards Program and Presidents Reception
- May—Project Graduation