**Suggested Timeline for Local Unit PTA Presidents**

**\*\*Please note - This is NOT a comprehensive list. Be sure to consult your local unit bylaws, ptakit.org, and huntsvillepta.org for more guidance\*\***

Right after election:

1. Complete New and Returning Officer Online Form. It is on the Alabama PTA website (alabamapta.org). It goes to Alabama PTA and Huntsville Council of PTAs automatically receives a copy.
2. Review the current bylaws. (They need to be updated every 3 years)
3. Make sure all new officers have a copy of the current bylaws of your PTA.

In July:

1. Meet with Treasurer to develop proposed budget for the year.
2. Meet with Programs VP to develop proposed calendar for the year.
3. Meet with Principal to discuss proposed calendar and budget for the year. It is a very good idea to check with the PTAs of feeder schools before scheduling the open house to avoid conflicts.
4. Schedule first board meeting to discuss goals for the year, and to get board’s approval of budget and feedback regarding the calendar.
5. Identify meeting days/times for board meetings.
6. Make plans to attend HCPTA Leadership Training, strongly recommend that other board members attend. Advertise at your local unit so all parents can attend. Consider including registration fees in the budget.

In August:

1. Make arrangements for Open House and review plans with principal.
2. Complete and submit security forms for all after-school events such as board meetings, open house, family reading night, etc.
3. Share important HCPTA and Alabama PTA dates with board members and committee chairs.
4. Make sure the proposed budget is available for review by the general membership.
5. At the Open House make sure you get the budget approved by the general membership.

In September:

1. Consider signing up for the National PTA School of Excellence program.
2. Turn in first round of memberships to Alabama PTA.

In October:

1. Make sure that HCPTA dues have been paid. Not paying the dues will make the PTA ineligible for awards, grants, concessions, Reflections, etc.

In November

1. Discuss Administrator of the Year, Support Person of the Year, Teacher of the Year award nomination process with the board. This will give you plenty of time to get surveys out and get results and also plenty of time for the grants and awards person to complete the applications.
2. Discuss which PTA standards awards to apply for and communicate with grants and awards person.
3. Make sure that the treasurer has filed the tax return with the IRS. It is due on November 15th each year for most PTAs. (Due date is tied to your fiscal year.)Probably a good idea to ask to see the receipt/confirmation. The Huntsville Council of PTAs will also want a copy of the confirmation.

In December:

1. Remind Programs VP to begin working on Nominating Committee. Check your bylaws for the procedure. The Nominating Committee is the only committee that the President is not a member of.

In January:

1. Check in with Programs VP to make sure that Nominating Committee selection process is going smoothly and that things are on track for approval of Nominating Committee as stated in bylaws.

In February:

1. Programs VP will inform Nominating Committee of open positions.
2. Make sure that Programs VP knows the deadline by which the Nominating Committee will need to have the slate of new officers (Executive Board is essential) and conveys that to the Nominating Committee.

In March:

1. March 1st is the final deadline to send in memberships to Alabama PTA.

In April:

1. Conduct election of new officers at a General PTA meeting or as your bylaws dictate.
2. Attend Alabama PTA Convention.

In May:

1. Identify someone to review the Treasurer’s files before new board takes over as dictated by your bylaws.

In June

1. Take a deep breath and relax!