**Suggested Timeline for PTA Leaders**

| **MCCPTA Suggested Timeline for PTA Leaders** |
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| **TASK** | **President** | **Treasurer** | **Other** |
| **Post-Election** |  |  |  |
| Identify ways in which your PT(S)A can reach out to potential members | X |  | Membership, Human Relations |
| Review your bylaws and distribute copies for Board of Directors | X |  | Secretary |
| Begin to identify potential committees and committee chairs, establish procedure books for each office, committee | X |  | Board of Directors |
| Poll community to determine possible programs for coming year |  |  | Program Chair |
| Attend MCCPTA Presidents/Principals Dinner (in late May) | X |  | Outgoing President, Delegates |
| Attend MCCPTA Spring Leadership Training | X | X | Board of Directors, Committee Chairs |
| Find out who your Cluster Coordinators and Area Vice President are | X |  |  |
| Fill out Blue Book form and return to MCCPTA office, online or hard copy | X | X | Board of Directors, Secretary |
| Make copies of this time line to distribute to Board of Directors | X |  | Secretary |
| Arrange for audit upon transfer of books from one treasurer to another | X | X | Board of Directors |
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| **Summer** |  |  |  |
| Attend Maryland State PTA Conference in July | X | X | Board of Directors |
| Meet with new Board of Directors and plan goals for the coming year | X | X | Board of Directors |
| Pay Insurance Premium to BB&T Insurance. Insurance will be effective July 1, 2012 until June 30, 2013. (See Maryland PTA Website for complete update information - under the insurance weblink.) | X | X |  |
| Approve plans of work for officers and committee chairmen |  |  | Board of Directors |
| Meet with principal - ask him/her to explain School Improvement Plan and identify parent involvement component of plan; talk about goals for the coming year; ask to include a welcome note from you to community in his/her back to school packet; establish a regular meeting time | X |  |  |
| Participate in School Improvement Plan meetings | X or designees |  |  |
| Plan publicity campaign for the coming year: back to school, PT(S)A meetings & programs, newsletters, membership drive, etc. |  |  | Membership, Human Relations, Publicity Newsletter |
| Plan calendar for the coming year | X |  | Program Chair |
| Sign up for room use with Inter-agency Coordinating Board (ICB): PTAs must request space by August 15th to guarantee priority. Include all PTA meetings, programs, book fairs, special events, etc. | X | X | Secretary |
| Attend an ICB training session | X or designee |  |  |
| Determine what PTA materials might need to be translated for the coming year |  |  | Membership, Human Relations |
| Review instructions carefully when PT(S)A membership cards arrive | X | X | Membership Chair |
| After goals are set, budget committee should develop PTA budget; the budget should be approved by board of directors prior to general meeting where budget is adopted | X | X | Budget |
| Sign new signature cards for bank | X | X | One other officer |
| Check bylaws to determine if they are current - get to know them | X |  |  |
| If your school has a preview day, see if PT(S)A can be visible that day |  |  | Membership, Volunteer |
| Call your cluster coordinator to find out cluster meeting schedule | X |  | Cluster Rep |
| If your school plans a "Welcome Back" for staff, participate | X |  | Volunteer, Hospitality |
| Send "Welcome Back" notes to staff, encourage them to join & participate in PT(S)A | X |  |  |
| Prepare and send a summer mailing, including membership forms and PTA programs, plans, and calendar | X |  | Membership |
| **Summer (cont'd)** |  |  |  |
| Check to see if liability insurance is paid |  | X |  |
| Review criteria for MD PTA Achievement Award; consider applying | X |  | Board of Directors |
| Obtain information from Maryland State PTA about Reflections program |  |  | Cultural Arts, Reflections |
| Plan Back to School Night - President's remarks? Approve budget? Volunteer sign-up sheets? Membership desk? | X | X | Board of Directors, Committee Chairs |
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| **September - June Ongoing** |  |  |  |
| Plan agenda, chair Board of Directors and genera membership meetings Include reports from delegates, cluster reps, treasurer, liaisons to other parent groups | X | X | Delegates, Cluster Reps |
| Attend MCCPTA Delegates' Assembly | X |  | Delegates |
| Attend Cluster Coordinator's meeting | X or designee |  | Cluster Rep |
| Report action taken at Delegates' Assembly |  |  | Delegates |
| Report on cluster meeting | X or designee |  | Cluster Rep |
| Pay MS quarterly sales tax: October, January, April, & July |  | X |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Write President's letter for newsletter | X |  |  |
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| **September** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Attend Cultural Arts Showcase (or early Oct) |  |  | Cultural Arts Chair |
| Attend MCCPTA Fall Leadership Training (or early Oct) | X | X | Board of Directors, Committee Chairs |
| Recruit and plan orientation for volunteers | X | X | Volunteer |
| Distribute Reflections information to school community |  |  | Reflections Chair |
| Possible Program Topics: present PT(S)A goal setting for the year; new initiatives at your school; ways to involve more parents; navigating the school or Edline for new parents |  |  |  |
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| **October** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Make sure all Board of Director members are paid -up PT(S)A members |  | X | Membership Chair |
| If bylaws need to be revised, appoint committee | X |  |  |
| Make initial membership report to Board of Directors |  | X | Membership Chair |
| Possible Program Topics: Child Health Day (October), National School Bus Safety Week (October), Walk to School Day (October) |  |  |  |
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| **November** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| **November (cont'd)** |  |  |  |
| Work with Cluster Coordinator, representatives to prepare CIP testimony | X |  | Cluster Rep |
| File IRS form 990 4.5 months after close of previous fiscal year - this can be prepared as soon as your audit is complete |  | X |  |
| Possible Program Topics: School Improvement Plan; Test scores; parent-teacher conferences; American Education Week - National Take Our Families to School Week |  |  |  |
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| **December** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Collect Reflection entries and have them judged |  |  | Reflections Chair |
| No Delegate Assembly this month |  |  |  |
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| **January** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Submit Reflections entries to MCCPTA by deadline |  |  | Reflections Chair |
| Attend MCCPTA forum on Superintendent's operating budget | X or designee |  | Delegates |
| Work with Cluster Coordinator, representatives to prepare operating budget testimony (in early January) | X |  | Cluster Rep |
| Check your PTA bylaws. When should the nominating committee be elected: By which body in your PTA? | X |  | Board of Directors |
| Possible Meeting Topics: midyear review of PTA goals; completion of first semester; second semester changes |  |  |  |
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| **February** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Elect Nominating Committee | X |  | Board of Directors |
| Participate in PTA Night in Annapolis | X or designee |  | Legislative Issues |
| Participate in selection of 2013-14 Cluster Coordinators | X |  | Cluster Rep |
| Possible Meeting Topics: 1st semester review; SIP plan; curriculum issues; National PTA Founders Day |  |  |  |
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| **March** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Does your nominating committee report this month? What about the bylaws committee? | X |  | Board of Directors, Committee Chairs |
| If your local plans to nominate someone for a National or State PTA Lifetime membership and /or a Partners for Education Award, the application needs to be completed shortly. Contact the MCCPTA office for more information. | X |  | Board of Directors |
| Membership numbers reported to Maryland PTA for awards consideration | X |  | Membership Chairs |
| Possible Program Topics: Midyear SIP review; spring testing |  |  |  |
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| **April** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| **April 15** deadline for filing Maryland Personal Property Tax Return |  | X |  |
| Reports from nominating, bylaws committees to membership; make sure that those reports are publicized with adequate notice | X |  | Secretary, Board of Directors |
| Send out committee evaluation sheets, due at end of year | X |  | Secretary |
| Remind Board of Directors to be prepared to turn over info/records to new board of directors | X |  | Board of Directors |
| Give input to Cluster Coordinators for budget testimony to County Council | X |  | Board of Directors |
| Let your principal know s/he will be the PTA's guest at the Presidents & Principals Dinner; send reservations in | X | X |  |
| Possible Meeting Topics: CIP issues; outreach |  |  |  |
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| **May** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| **May (cont'd)** |  |  |  |
| Prepare for election (call Cluster Coordinator, AVP, or MCCPTA office if you need help) | X |  | Nominating Committee |
| Conduct elections as specified in your bylaws | X |  |  |
| Attend MCCPTA Presidents & Principals Dinner | X | X | Board of Directors |
| Prepare CIP input and operating budget input - discuss at May PTA meeting to get input from your members | X |  | Cluster Reps, Delegates |
| Possible Meeting Topics: National PTA Appreciation Week (NOTE: some schools designate this as "Staff Appreciation Week"); analyze successes and difficulties of the year ; Make recommendations for next year |  |  |  |
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| **June** |  |  |  |
| Pay State and National PTA dues to Maryland PTA monthlyPay MCCPTA dues monthly to MCCPTA Office |  | X |  |
| Install officers for the coming year | X |  |  |
| Provide for transfer of information/records | X | X | Board of Directors |
| Thank everyone who has volunteered this past year | X |  | Committee Chairs |
| ATTEND MCCPTA SPRING LEADERSHIP TRAINING | X | X | Board of Directors |