

MCCPTA Suggested Timeline for PTA Leaders						
	<i>Standards of Continuing Affiliation (SoCA) Requirement in boldface italics below; these items must be completed as noted to retain unit's good standing</i>					
Task		PTA Officer(s) Responsible				
Requirement		President	Treasurer	Secretary	Others	Required
Post-Election						
MD PTA/SoCA	Complete and send contact information form to Maryland PTA within two weeks of election	x		x		x
MCCPTA	Complete and send Blue Book form to MCCPTA office	x		x		x
Local	Review bylaws and distribute copies to Executive Committee members	x			Executive Committee	
MCCPTA	Attend, with Principal, MCCPTA Presidents & Principals Dinner (May) (Include 2 tickets in annual budget)	x			Board of Directors	
MCCPTA	Attend MCCPTA Spring Leadership Training (early June); Financial training for Treasurer is required	x	x	x	All	
MD PTA/SoCA	Arrange a financial audit to take place at the end of the PTA fiscal year (June 30); copy of audit must be sent to Maryland PTA	x	x			x
Local	Examine membership numbers and begin thinking about ways to grow during the coming year	x	x		Membership Chair, Board of Directors	
Local	Budget prep (can be done Spring before the next fiscal year with old/new treasurer and old/new president and a finance committee, or in Summer with new treasurer/president and finance committee). <i>NOTE: No disbursements can be made before budget is approved by general membership</i>	x	x		Budget/Finance Committee	
Local	Begin to identify potential committee chairs and members of Board of Directors	x			Executive Committee	
MCPS	Work with outgoing president and principal to prepared school comments for the annual Capital Improvements Program (CIP) review and priorities; provide to cluster coordinators and CIP chair(s)	x			MCCPTA Delegates	
MD PTA	Register to attend Maryland PTA Summer Convention (two days in mid-July) by June deadline.*Include registration in annual budget for at least 2 Officers/Delegates.	x	x	x	Board of Directors	
June-July						
MD PTA/SoCA	Pay PTA insurance premium; insurance is effective July 1 - June 30. See Maryland PTA website for further information.		x			x
MCCPTA	Attend MCCPTA Spring Leadership Training (early June)	x	x		All	
MD PTA	Attend the Maryland PTA Summer Convention (mid-July)	x	x		All	
Local	Meet with new Executive Committee as soon as possible after July 1 and elect committee chairs	x			Executive Committee	
Local	Meet with new Board of Directors and plan goals for the coming year, including membership goals and drive	x	x		Board of Directors	
Local; Summer Agenda	Consider participation in the National PTA Reflections Program; if school is new to the program, contact the MCCPTA Reflections Chair or Maryland PTA for information and program guidelines	x			Reflections Chair	
Local	Plan and prepare summer mailing, including membership form, highlights of PTA plans and accomplishments, volunteer forms	x			Membership Chair, Board of Directors	
Local; Summer Agenda	After goals are set, develop PTA budget; draft budget must be approved by Board of Directors before going to the general membership for final approval at the start of the school year	x	x			
Local	Transfer financial records to new treasurer (if applicable); go to bank and sign new signature cards (all PTA checks require two signatures)	x	x		Additional Signatory	
Local	Meet with principal - discuss School Improvement Plan, identify areas for parent involvement, talk about goals for the coming year, ask for principal's support for PTA, plan and schedule regular meetings	x				
MCPS / Local	Participate in School Improvement Plan, Leadership Team, or other meetings to represent parent stakeholders	x				

Local; Summer Agenda	Plan calendar for the coming year; share with school administration; be sure to respect PTA Tuesdays (Elementary - 1st; Middle - 2nd; High School - 3rd; MCCPTA DA - 4th)	x			Board of Directors, VP Programming	
Local	Attend an Inter-agency Coordinating Board (ICB) training session in Rockville; ICB is a Montgomery County office; Required for county space rental	x			Designee	
MCCPTA	Introduce self to cluster coordinator(s), if not met already	x				
August						
Local; Summer Agenda	Plan with principal and Board of Directors how PTA can be visible at all Back-to-School events, including preview days, Back-to-School night, etc.	x			Board of Directors, Membership Chair	
Local; Summer Agenda	Plan PTA-sponsored Back-to-School event for school community and staff; include membership plan for parents and teachers, and students if PTSA	x			Board of Directors, Membership Chair	
Local	Budget prep (can be done Spring before the next fiscal year with old/new treasurer and old/new president and a finance committee, or in Summer with new treasurer/president and finance committee). <i>NOTE: No disbursements can be made before budget is approved by general membership</i>	x	x		Budget/Finance Committee	
Local	Sign up for room use with Inter-agency Coordinating Board (ICB); PTAs have a priority and must request space by August 15. Include all PTA meetings, programs, events.	x			Designee	
Local	Update the PTA website with calendar of events and contact information	x			Webmaster	
Local	Watch PTA mailbox for membership cards; cards are sent by Maryland PTA; add unit name and information to cards				Membership Chair	
Local	Plan for kick-off PTA membership meeting; this will set the tone for the year	x			Board of Directors	
MD PTA/SoCA	<i>Review bylaws to make sure they are current and/or need to be reviewed to retain unit's good standing. If bylaws are up for renewal this fiscal year, plan to appoint a bylaws committee.</i>	x			Bylaws Chair	x
Monthly (September - June)						
Local	Plan agendas, chair Board of Directors and general membership meetings. Include financial review and MCCPTA delegates reports at all meetings	x			Secretaries	
Local	Plan a program/speaker for general membership meeting; pick topics that are of interest to school community (consider working with the school's Counseling office to come up with topics)	x			Board of Directors; designee for programming (VP, Comm. Chair)	
MCCPTA	Attend MCCPTA Delegates Assembly (4th Tuesday)	x			MCCPTA Delegates	
MCCPTA	Attend cluster meetings as scheduled by Cluster Coordinator(s)	x			VPs, MCCPTA Delegates	
MCCPTA	Keep PTA leadership and membership informed of MCCPTA-sponsored events, resources, and advocacy work	x			MCCPTA Delegates	
MCCPTA	Send MCCPTA dues (\$1 per member) monthly to MCCPTA office. MCCPTA does not/not send an invoice; invoice is available on the MCCPTA website		x			
MD PTA/SoCA	<i>Send National and Maryland PTA dues monthly to Maryland PTA office; Maryland PTA will send a monthly invoice</i>		x			x
Local	Communicate regularly with membership, via PTA website, email, social media, telephone, bulletin boards, school marquee, flyers, and/or newsletters	x			All	
Local	Translate key PTA communications into the languages spoken in the school community; identify parent, student, and/or staff volunteers to help with this work	x			Designee - Comm. Chair, Secretary	
Local	Have a PTA Membership table at all PTA and school events	x			Membership Chair, Board of Directors	

MCCPTA Suggested Timeline

Updated: June 2015

September						
MCCPTA	Attend MCCPTA Fall Leadership Training	x	x		All	
MCCPTA	Attend Cultural Arts showcases				Cultural Arts Chair	
Local	Recruit and plan orientation for volunteers	x			Volunteer Coordinator, Board of Directors	
Local, MCCPTA	Distribute Reflections information to school community; work with school English, music, and fine arts teachers to involve them and encourage participation				Reflections Chair	
October						
	Watch PTA mailbox for MCCPTA Delegates cards and the MCCPTA Blue Book	*				
Local	Make sure all Board of Directors members have paid PTA dues	x	x		Membership Chair	
MD PTA/SoCa	Make sure PTA audit was completed and a copy sent to Maryland PTA by October 31	x	x		Board of Directors	x
Local	Review membership numbers; devise a drive to gain the membership of those who have not yet joined				Membership Chair, Board of Directors	
November						
MD PTA/SoCa	File IRS form 990 no later than November 15; send a copy of the 990 to the Maryland PTA office. 990 can be completed as soon as the audit from the previous year is complete		x			x
MCCPTA	Work with cluster coordinators on CIP testimony	x			MCCPTA Delegates	
MCCPTA	Attend Board of Education CIP hearing; each school community's needs are addressed; encourage PTA leaders and members to attend	x			All	
MCCPTA	Collect Reflections Program entries				Reflections Chair	
MCCPTA	MCCPTA Delegates must have valid MCCPTA Delegates card to vote; local PT(S)As receive cards upon paying MCCPTA Dues	x	x		MCCPTA Delegates	
December						
MD PTA/SoCa	File Maryland Charitable Organizations form 990 no later than December 31; send a copy of the form--or a note saying PTA is exempt--to the Maryland PTA office by December 31.		x			x
MD PTA/SoCa	All PTAs participating in the Reflections Program must be in good standing--have met all Standards of Continuing Affiliation requirements--by December 31	x	x		Reflections Chair	
MCCPTA	Submit and deliver Reflections winners from schools to MCCPTA office; be careful to check paperwork prior to delivery				Reflections Chair	
MCCPTA	Work with cluster coordinator(s) on Operating Budget testimony	x			MCCPTA Delegates	
January						
MCCPTA	Attend Board of Education Operating Budget hearing; school community's needs will be addressed; encourage PTA leaders and members to attend	x			All	
MCCPTA	Consider and discuss who the PTA might want to nominate for an MCCPTA award and/or a Maryland PTA Lifetime Achievement Award from local PTA				Board of Directors	
February						
MCCPTA	Plan to attend the MCCPTA Presidents & Principals Dinner in May; invite the principal. Event open to PTA leaders. Consider reserving a seat for the incoming president; ticket information on MCCPTA website	x				

Local	Form a Nominating Committee per local bylaws; provide nominating committee with guidance; president cannot participate in nominating committee work				Board of Directors	
MD PTA/SoCA	Check date - Attend PTA Night in Annapolis; opportunity to meet elected General Assembly officials, advocate for school community's needs; encourage PTA leaders and members to attend	x	x		All	
MCCPTA	Participate in nomination of next year's MCCPTA cluster coordinators and AVP	x				
MCCPTA	Attend the MCCPTA Operating Budget Forum	x			All	
MCCPTA	Submit nominees for MCCPTA annual awards; information on the MCCPTA website				Board of Directors	
March						
MD PTA/SoCA	Deadline--March 31--for dues/members to count towards MCCPTA and Maryland PTA membership awards; make sure all memberships have been reported and paid for to MCCPTA and Maryland PTA	x	x		Board of Directors	
Local	Ensure Nominating Committee is on the timeline indicated in unit's bylaws; most local bylaws require a slate to be presented to the membership in April				Board of Directors	
MCCPTA	Attend County Council budget hearing; school community's needs will be addressed and a presence validates these requests; encourage PTA leaders and members to attend	x			All	
April						
MD PTA/SoCA	File Maryland Personal Property Tax Return no later than April 15; send a copy to the Maryland PTA office		x			x
Local	Ensure Nominating Committee is on the timeline indicated in bylaws; most local bylaws require a slate to be presented to the membership in April				Board of Directors	
MCCPTA	Attend County Council budget hearing; school community's needs will be addressed and a presence validates these requests; encourage PTA leaders and members to attend	x			All	
MCCPTA	Remind principal and invited PTA leaders about MCCPTA Presidents & Principals Dinner	x				
Local	Remind board members that they should prepare to turn over information and records to incoming officers and board members at the end of the year. Suggest and schedule transition meetings.	x				
May						
Local	Prepare for PTA election; cluster coordinators are available if suggestions or guidance are needed	x				
Local	Conduct elections as indicated in bylaws; most local bylaws require elections at the May or June "annual" general membership meeting	x				
MCCPTA	Enjoy the MCCPTA Presidents & Principals Dinner and announcement of membership award winners	x			Principal and Invited Leaders	
MCPS, MCCPTA	Work with incoming president and principal to prepare school comments for the annual Capital Improvements Program (CIP) review and priorities; provide to cluster coordinators and CIP chair(s)	x				
June						
Local	Install officers for the coming year; provide for a transfer of information and records	x	x		All	
Local	Thank everyone who volunteered and supported the PTA this past year; consider an incoming/outgoing leadership event	x				
MD PTA/SoCA	Pay National and Maryland PTA dues to Maryland PTA office		x			
MCCPTA	Pay MCCPTA dues to the MCCPTA office; invoice on MCCPTA website		x			