

Unit PTA Presidents Timeline

April and May

- Attend Kansas PTA Convention
- Input new PTA Officers contact information to [MemberHub](#) for Kansas PTA.
- Submit new PTA Officers information to [SMAC PTA](#).
- Attend SMAC School of Instruction and encourage all incoming Officers attendance (first Wed in May)
- Send in School of Instruction Registration
- Become familiar with PTA organizational structure and process, unit bylaws and standing rules, PTA job descriptions, PTA resources, and district policies and procedures.
- Meet with outgoing president to discuss transition.
- **Insurance renewal will be mailed at this time. Follow-up with current Treasurer/President for renewal.**
- Select committee chair positions according to your bylaws and/or standing rules.
- Meet with principal to go over plans, dates, communication, and expectations for the coming school year.
- Meet with incoming chairs that have responsibilities at the beginning of the school year.
- Ensure all outgoing chairs and officers pass along all materials to their successors.
- Ensure the outgoing President has formed an Audit Committee to meet and audit your books, soon after close of year on June 30th.

Summer

- Sign check cards with bank.
- Clean out PTA mailbox before building closes.
- **Confirm that treasurer has renewed [liability insurance](#).**
- **[Send proof of liability insurance coverage](#) to SMSD Facilities Coordinator: Sammie Kudera – <mailto:sammiekudera@smsd.org>.**
 - **This certificate must include SMSD as Additional Insured. File an additional copy in your school office as well. Failure to do so may cause cancellations of PTA events.**
 - **This is due no later than September 1st**
- Have budget meeting to plan for next year's budget (can be done before school is out) – your bylaws/standing rules may have specific guidelines.
- Budget sufficient funds to send delegates to the Kansas PTA Convention, Regional Conferences, Leadership Seminars, National PTA Convention, and Shawnee Mission Education Foundation Breakfast fundraiser (or make a donation).
- Have a Bylaws / Standing Rules review and update meeting.

- Sign up for National PTA electronic newsletters (PTA Takes Action and PTA Local Leader News) and their Back-to-School Kit at www.pta.org
- Distribute information from the Kansas PTA Leaders Guide to officers and chairs. (This is distributed in June. KS PTA Officer submission must be complete to receive)
- Check PTA mailbox as soon as building re-opens.
- Conduct Annual Audit
- Submit Annual Audit to KS PTA no later than Sept. 15
- Submit Standing Rules to State

August

- Submit all activity dates to building administration and request reservation with facilities coordinator at SMSD – brendadavis@smsd.org
- Obtain copy of official school calendar.
- Hold August board meeting to present budget. (Approval will take place at first general meeting).
- Provide all board members with board rosters, by-laws, standing rules, and school procedures for inclusion in procedure notebooks..
- Place membership information in school newsletter, etc
- Plan for Back-to-School Night – coordinate membership, hospitality, treasurer and volunteer chairs. Arrange for a membership table and volunteers to pass out PTA information, collect dues, and distribute proposed budgets.
- **Give list of board members and contact information to your building office/secretary.**
- **Attend SMAC Presidents’ and Principals’ Breakfast (late August)**
- Attend other back-to-school events in building/district as invitation is extended.
- Ensure Annual Audit is submitted to KS PTA.

When School Begins:

Begin a Weekly Routine:

- Check mailbox – sort mail; contact appropriate committee chairs for pick-up.

Begin a Monthly Routine:

- Submit Monthly membership dues and membership list to Kansas State PTA.
- Contact Executive Committee members at least a week in advance of meeting to determine agenda items and committee needs.
- Prepare Executive Committee agenda and meet with Executive Committee
- Prepare General Meeting Agenda, as needed.
- Communicate SMAC PTA training events to appropriate committee chairs.
- Submit newsletter articles / emails to membership as needed.
- Attend PTA events as needed.
- Attend SMAC meetings as needed.
- Respond to requests from school as submitted.
- Distribute SMAC, State & National PTA emails, information, via email to all chairs.

September

- Ensure that [SMAC Dues and Clothing Exchange](#) donation checks have been submitted. – Due no later than Sept. 15

October

- Attend SMAC General Meeting.

November

- Review plans for second semester, and make adjustments as needed.
- **Confirm with treasurer that form 990 has been filed. The Form N-990 (e postcard), [Form 990 or 990 EZ](#) are due November 15th. Update completion date in MemberHub, and send confirmation of filing to Kansas PTA at kansaspta@gmail.com**
- **Begin preparations for your Nominating Committee, according to your standing rules.**

December

- Contact your legislative liaison with strategies for upcoming legislative session.

January

- Review progress and necessity of committees. Make adjustments for next year as needed according to bylaws and/or standing rules.
- Send representation to Kansas PTA Advocacy Day in Topeka.

February

- Attend SMAC General Meeting.
- National PTA Take Your Family to School Week

March

- Circulate volunteer opportunities for next year among membership.

April

- Remind out-going board that year-end reports and notebooks need to be turned in next month.
- Inform in-coming board about SMAC PTA School of Instruction.
- Discuss transition of incoming officers and job responsibilities with president elect.
- Approve expenditures of any excess funds.
- Submit newly elected Executive Board members contact information to SMAC & KS PTA (Or as soon as elected).
- Distribute information about School of Instruction, and Kansas PTA Convention to Incoming officers.
- Appoint an Audit Committee as specified in bylaws and/or standing rules.
- Attend and/or send delegates to KS PTA Convention

May

- Install new officers and turn over final meeting to new president.
- Collect year-end reports.
- Attend School of Instruction.
- Appoint Audit Committee
- Continue in official capacity for check signing, end of year events, and reporting purposes as agreed upon with incoming president.

June

- Continue in official capacity for check signing.
- Remind chairs that financial books close June 30th.
- Remind treasurer to prepare books for audit in July.

July

- Treasurer's books audited. Give final audited report to incoming President, update Audit completion date in MemberHub and send a copy to KS PTA at kansaspta@gmail.com