

Area 3 Gwinnett Council

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Local Unit PTA
“Yellow” Planning Calendar
2010-2011

www.gwinnettpta.org/Area_3

Live. Learn. Lead.

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Local Unit Planning Information

As a local unit officer it is your responsibility to keep everything and everyone running efficiently. In order to do this you must stay one step ahead of everyone else. This calendar is meant to help your executive officers stay on top of everything. This is a tool to help you prepare for each month of your rein in office. It is a good idea to review it regularly and to look ahead 30/60/90 days when planning each meeting.

Preparing For Your Term as a Local Unit Officer

President:

- Review this planning guide and familiarize yourself with the deadlines for submitting awards this year.
- Make plans for all officers to attend the Georgia State Convention and Leadership Conference June 25 & 26 in Atlanta. Encourage your officers and board to attend this important training event. This is a great use of your PTA budget dollars.
- Review the guidelines and requirements for earning awards this year. Deadlines and page references can be found on page 10 of the Georgia PTA Resource Guidelines Handbook.
- Promote District 12's theme for 2010-11 "*Live. Learn. Lead.*" Work to develop new leaders in your local unit PTA.
- Read your local unit bylaws. Give copies to all officers and the board of directors if they do not have them already. Use Executive Committee meetings to review portions of the bylaws with your other officers.
- Schedule executive committee, board of directors and general membership meetings in accordance with your local unit bylaws. All bylaws require a minimum of 3 general membership meetings.
- Collect all documentation from your local unit PTA events in a binder monthly. They will be helpful when writing reports. Reports are due in February (examples of documentation include publicity materials, news articles, photos, thank-you notes, and event / program goals, plans, and outcome).
- Check your email often for updates and information from Council and Georgia PTA.
- Bookmark the websites for Georgia PTA, National PTA, and Gwinnett PTA. Check these websites often for important dates and information.
www.georgiapta.org www.pta.org www.gwinnettpta.org.

Vice President(s):

- Discuss with the president what your responsibilities of your term will be (i.e.: will you organize and temporarily chair the nominating committee, organize the audit, oversee fundraising etc.) including month to month operations such as reconciling and signing bank statements.

Treasurer:

- Follow up with out going Treasurer to confirm completion of last year's audit.
- Confirm that all current officers who will sign checks (you, the president and an emergency signer-not a VP) are on the signing card registered at the bank and that all previous offers have been removed. You will need the minutes from the election meeting with you.
- Renew insurance/bonding through AIM.
- Get organized. You may like a previous officers system; if not create your own.

Secretary(s):

- Follow up with out going Secretary to collect minutes from last year's meetings
- Confirm with outgoing secretary that all current officers' contact information has been sent to both council and state. This should be done by May 1st.
- Discuss with president any other responsibilities that you may have. (i.e.: collecting materials each month to build a file for Priority Report writing, sending Thank you notes, newsletter etc.)

Preparation for Every Meeting

President:

- Prepare a printed agenda.
- Pass on information received from Council, State, and National PTAs to your executive committee and committee chairpersons.
- Review projects, events and tasks for the next 30/60/90 days.

Vice President

- Remember to thank your volunteers and do this often.
- Get new projects/tasks from the President and discuss your specific roles in these projects and tasks.

Secretary:

- Prepare minutes for each meeting – If it is not in the minutes, it did NOT happen. Business conducted must be documented in the minutes.
- If you are unable to attend to record minutes assign someone ahead of time.
- Treasurer's reports and committee reports should be filed with minutes for audit.

Treasurer:

- Prepare printed Treasurer's report for each meeting and have a copy of the transaction detail available for review, if requested.
- Submit membership dues to National and State PTA for new members.
- Make sure check request forms are submitted, signed, and approved before issuing checks.
- All checks require two signatures.
- Pass bank statements on for review and signature.

Membership Chairperson and Secretary:

- Update the Membership list and give a copy to the secretary. Membership card templates and sample membership rosters can be downloaded at Georgia PTA. Go to www.georgiapta.org and click on the tab for PTA leaders and go to membership.

Everyone:

- Remember to take time for you and your family.
- Keep in mind the reason you are involved in PTA – children and youth!

JUNE

President:

- Register to attend the Georgia PTA's Convention and Leadership Training Conference June 25 & 26. Make hotel reservations for those who are attending
- Meet with your Principal to discuss goals and expectations of the upcoming year.

Secretary:

- Confirm that all incoming officer information has been sent to BOTH Council and Georgia PTA by your outgoing secretary. Due date was May 1st.



Treasurer:

- Familiarize yourself with the previous year's budget.
- Create a filing system for the upcoming year.

JULY

President:

- Meet with your Principal to discuss projects and events for the upcoming year as well as your proposed budget.
- Hold a planning meeting with your officers and board
 - Discuss proposed budget for board approval.
 - Discuss plans to attend Council Meeting and Training Workshops.
 - Discuss plans for Student Registration/Orientation Day in August before school begins.
- Plan your general PTA general membership meeting to approve your budget.
- Discuss how you're going to roll out Reflections (Together We Can) in your school.

Vice President/Secretary/Treasurer

- Stay in contact with your officers and plan ahead.

Membership Chairperson:

- Now is the time to plan your membership campaign for the upcoming school year. Watch for publicity ideas and membership campaign information from National PTA or go to www.pta.org for more information.
- Prepare for Student Registration/Orientation Day in Aug.

Reflections Chairperson:

- Now is the time to plan your Reflections campaign for the upcoming school year. Watch for publicity ideas and Reflections campaign information from National PTA or go to www.pta.org for more information. Our Reflections theme for 2010-2011 is "Together We Can"
- Plan to kick off your "Together We Can" campaign at Student Registration.
- Plan to attend Council Training Reflections Workshop in August.

AUGUST

President:

- Review your local unit bylaws – they are your road map for a successful year!
- Distribute materials received at training sessions to officers and committee chairpersons.
- Attend the Council Start of School Year Training Workshops on August 24, 10:00am **OR** 6:30pm at the Gwinnett Environmental and Heritage Center.
- Submit incoming chairperson information online to BOTH Council and Georgia PTA.
- Provide your committee chairpersons with the materials they need to be successful and write Priority Reports.
- Make plans with your Officers and Legislative Chairperson to attend the Georgia PTA's State Advocacy and Legislative Conference.
- Council dues are due by September 1 to Council Treasurer
- Consider making a \$25 Reflections contribution to State PTA and \$25 to Council PTA for awards.
- Submit dues and form which must be post marked by the last business day in August for the Visionary Pin and Certificate and the Pacesetter's Certificate. (page 163 GA Resource Guide)



Vice President:

- ❑ Attend the Council Start of School Year Training Workshops on August 24, 9:30am **OR** 6:30pm at the Gwinnett Environmental and Heritage Center.

Treasurer:

- ❑ Read over all of the Treasurer's materials from Council, State and National PTA.
- ❑ Make sure the financial review report of last year's books is in order for presentation at first the general PTA membership meeting. The audit report should be presented to the general membership and board once received.
- ❑ Submit dues and form which must be post marked by the last business day in August for the Visionary Pin and Certificate and the Pacesetter's Certificate. (page 163 GA Resource Guide)
- ❑ Council dues are due by September 1 to Council Treasurer
- ❑ Attend the Council Start of School Year Training Workshops on August 24, 9:30am **OR** 6:30pm at the Gwinnett Environmental and Heritage Center.

Secretary:

- ❑ Attend the Council Start of School Year Training Workshops on August 24, 9:30am **OR** 6:30pm at the Gwinnett Environmental and Heritage Center.
- ❑ Gather minutes from election meeting for review and approval at general PTA membership meeting.

Membership Chairperson:

- ❑ Membership drive is in full swing. The new membership awards, Visionary Pin and Pacesetter's Certificate, are due to Georgia PTA and must be post marked by the last business day of August.

Reflections:

- ❑ Kick off your "Together We Can" Campaign at Student Registration.
- ❑ Download and print the GA PTA Reflections Handbook found on the Georgia PTA website.
- ❑ Attend Council's Reflections Workshop at the Gwinnett Environmental and Heritage Center August 24, 9:30am **OR** 6:30pm at the Gwinnett Environmental and Heritage Center. Please bring printed copy of GA PTA Reflections Handbook to this workshop.
- ❑ Reflections Chairperson profile, found on the Georgia PTA website, due to Council Reflections co-Chair, Terry Santerfeit at TerryArea3@gwinnettPTA.org on or before August 18th.

SEPTEMBER

President:

- ❑ Thank your volunteers who have worked hard to make the start of the year a success.
- ❑ Attend the District 12 Fall conference either September 27th (6:30pm) or September 28th (9:30am) at the ISC Building.
- ❑ Remind treasurer to send \$200.00 Council dues. Due date September 1, 2009.
- ❑ Remind treasurer to send audit packet to Georgia PTA.
- ❑ Submit membership dues; must be post marked by the last business day of September for Early Bird Certificate and Platinum Membership Award (page 163 in the GA Resource Guide)
- ❑ Remind your committee chairs to make contact with all persons who volunteered to assist the PTA this year.

Treasurer:

- ❑ Submit Council dues before September 1 to Council Treasurer.



- ❑ Attend the District 12 Fall conference either September 27th (6:30pm) or September 28th (9:30am) at the ISC Building.
- ❑ Submit Reflections Donations to GA PTA and Council PTA
- ❑ Submit membership dues; must be post marked by the last business day of September for Early Bird Certificate and Platinum Membership Award (page 163 in the GA Resource Guide)
- ❑ Submit audit packet to Georgia PTA; must be post marked by the last business day of September.

Membership Chairperson:

- ❑ Attend the District 12 Fall conference either September 27th (6:30pm) or September 28th (9:30am) at the ISC Building.
- ❑ Continue your membership drive.
- ❑ Sept. 19 – 25 National TV Turn Off Week
- ❑ Update the roster of PTA members and provide a copy to your secretary and president.
- ❑ Your membership campaign is for the entire school year, not just the first few months.
- ❑ Confirm that your treasurer has submitted the PTA Dues Transmittal form to the GA PTA for the membership you have collected this month and the dues form for the membership awards, Platinum Membership and Early Bird Certificate. These forms should be sent to Georgia PTA and are due by September 30.

Legislative Chairperson:

- ❑ Attend the District 12 Fall conference either September 27th (6:30pm) or September 28th (9:30am) at the ISC Building.
- ❑ Attend the Georgia PTA's State Advocacy and Legislative Conference usually in September at the State Capitol.

Reflections Chairperson

- ❑ Attend the District 12 Fall conference either September 27th (6:30pm) or September 28th (9:30am) at the ISC Building.
- ❑ Secure judges for Reflections entries.
- ❑ Set local level deadlines to insure completion of judging, showcasing and preparing entries for council deadline of October 25th at 10:00am.

OCTOBER

President:

- ❑ October 3-9 – National Fire Prevention Week.
- ❑ October 11–15 – National School Lunch Week.
- ❑ October 18-22 – National School Bus Safety Week.

Treasurer:

- ❑ Submit membership dues; must be post marked by the last business day of October for the Gold, Oak Tree and Partnership Awards (pages163-165 in the GA Resource Guide)

Membership Chairperson:

- ❑ This is Male Members month. Host a special drive targeting male members.
- ❑ Work with your treasurer to send in the next membership installment due by the last business day of October.
- ❑ Forms for the Gold, Oak Tree and Partnership Membership Awards; must be postmarked by the last business day of October.



Reflections Chairperson:

- ❑ Reflections entries should be delivered to Council on Monday October 25th at the Gwinnett Environmental and Heritage Center. Entries can be received between 10:00 AM – 12:00 PM

NOVEMBER / DECEMBER

President:

- ❑ Begin reviewing information in the Council and State handbooks regarding report writing.
- ❑ Remind Reflections Chairperson of the Council Reflections Exhibit and Awards Ceremony at the Gwinnett Environmental and Heritage Center on November 9th, 10th, and 11th if needed.
- ❑ Follow up with treasurer to insure that they file Form 990 with the IRS by November 15.
- ❑ American Education Week November 14–20.
- ❑ World Kindness Week November 8-14.

Treasurer:

- ❑ File your local unit's Form 990 with the IRS by November 15.
- ❑ Submit PTA Dues Transmittal Form to the Georgia PTA for additional memberships collected and submit the Silver Membership Certificate; must be post marked by the last business day of the November.

Legislative Chairperson:

- ❑ Plan now and determine how you will keep your membership informed about issues being presented during the upcoming Legislative Session.

Membership Chairperson:

- ❑ Continue your membership drive.
- ❑ Work with the treasurer to send in the next membership installment on November 30 for any new memberships you have received and submit the form for the Silver Membership Award.
- ❑ Update your membership roster and give copies to your secretary and president.

Reflections Chairperson:

- ❑ Plan how you will recognize and reward the students who participated in your program.
- ❑ Plan to hang Reflections Exhibit entries at the Gwinnett Environmental and Heritage Center during the week of November 1st from 10:00 – 2:00. **Please plan to attend or send someone who can come in your place – we'll need ALL the help we can get!**
- ❑ Plan to attend the Council Awards Ceremony at the Gwinnett Environmental and Heritage Center Tuesday Nov.9th, Wednesday Nov. 10th and Thursday Nov. 11th if needed.
- ❑ November 15th – 18th exhibit open for public viewing.
- ❑ Dismantling of exhibit November 19th at 10:00 am. **Please plan to attend or send someone who can come in your place – we'll need ALL the help we can get!** Reflections entries should be checked-out from the Gwinnett Environmental and Heritage on November 19th from 10:00 AM – 12:00 PM.

JANUARY

President:

- Prepare for the election of your Nominating Committee, which should be held at a general PTA membership meeting (follow your local unit bylaws).
- Review the Georgia PTA Priority Report guidelines.
- Evaluate progress toward reaching PTA's goals.
- Attend the Council meeting and Training Workshop on January 13th from either 9:30-11:30 OR 6:30-8:30; location TBD.
- "Outstanding Principal" nomination form due to Council PTA by January 12th. Form can be found on Georgia PTA website.
- "Outstanding School Nurse" nomination due to Georgia PTA by January 12th. Form can be found on the Georgia PTA website.

Legislative Chairperson:

- Georgia General Assembly session begins – remember to keep your membership informed of important activity.

FEBRUARY

President:

- Plan to attend PTA Day at the Capitol.
- Remind your treasurer to submit membership dues and the Bronze Membership Award form to Georgia PTA by February 26.
- Priority Reports are due to the Georgia PTA by February 26. Send copies to BOTH Council president and the District Director.
- "Model PTA Award" form due to Georgia PTA by February 26. Send copies of the form to Council and District.
- Local Unit PTA handbooks and newsletters due to the Georgia PTA by February 26.
- Local Unit Incorporation renewal due to the Georgia PTA on February 26.
- Application form for a Georgia PTA Scholarship is due to Georgia PTA; must be post marked by the last business day of February.
- "Visionary Award" nomination form due to Georgia PTA; must be post marked by the last business day of February.

Treasurer:

- Submit PTA Dues Transmittal form to the Georgia PTA for additional memberships collected and Bronze Membership Certificate; must be post marked by the last business day of February.

Legislative Chairperson:

- Continue to monitor the legislative activities and plan to attend PTA Day at the Capitol in February.

Membership Chairperson:

- Remember to work with the treasurer to send in the next membership installment on or before the last business day of February for any new memberships you have received – keep your membership roster current and give copies to the secretary and president or co-president.

MARCH

President:

- Plan to attend Council's Training Session Tuesday March 15th at 9:30am OR 6:30pm; location TBD.
- Plan the general membership meeting to elect next year's officers according to your local unit bylaws.
- Watch for an opportunity to attend a Georgia PTA University.
- Remember to celebrate "Exceptional Children's" Week.
- National PTA Unit Achievement Award due to National PTA. Get the details at www.pta.org.
- The following forms and nominations are due to Council by March 1st. Council will forward reports on to Georgia PTA by the second Friday in March. Pages listed are where the forms may be found in the Georgia Resource Guidelines and Handbook. Forms can also be found at www.GeorgiaPTA.org.
 - Outstanding Local Unit Report pg. 201-202
 - Advocacy Checklist* pg. 203
 - Membership and Programs Checklists*pg. 204
 - The Model PTA Cover Sheet 206
 - The Model PTA Living Document (Administration Guidelines)pg. 207
 - The Model PTA Living Document (Operational Guidelines) pg. 208
 - Birney Butler Outstanding Educator Nomination pg. 209
 - Outstanding Principal Nomination pg. 210-211
 - Outstanding School Nurse Nomination pg. 212
 - Visionary Award Nomination pg. 213
 - "Best Ideas" Form pg. 214
 - Healthy Fundraising Award pg. 139-140
 - May 15 CLT Grant Application pg. 188
- Dues transmittal form for membership needs to be submitted to Georgia PTA. This is the final opportunity to submit dues to Georgia PTA for the current year.

Treasurer:

- Submit a dues transmittal form for any membership received this month. This is the final opportunity to submit dues for the current year. Membership year ends April 15th.

Membership Chairperson:

- Present a summary of your membership activity to the Board. Finalize your membership rosters. Submit final membership dues to Georgia PTA.

Legislative Chairperson:

- Present a summary to your membership regarding actions taken during this legislative session.

Nominating Committee:

- This committee should be in place according to your local unit bylaws and actively seeking next year's PTA leadership. Remember that all Nominating Committee discussions are confidential and the president or co-presidents do not serve on this committee. Review the Georgia PTA Nominating and Elections Guide and follow your bylaws.

APRIL

President:

- Plan to attend your District's Area Board of Education meetings.
- Plan to attend the 12th District Spring Conference and Vendor Fair being held at the Gwinnett County Public Schools ISC Building on April 18th (5:30-7:00 vendor; 7:00-9:30 business meeting).
- In coordination with your Environmental Chairperson, plan your local unit's Earth Week activities.
- Remember to recognize and celebrate your local unit's volunteers.
- Begin planning your Teacher Appreciation events for May.
- Remember Kindergarten round-up the first of May. This is a great time to setup a PTA table and welcome next year's Kindergarten families.
- Begin final evaluation of this year's progress.

Secretary:

- Make sure your committee chairpersons are finalizing their procedure books for next year's use.

MAY

Outgoing President:

- Plan to attend the Area 3 Council PTA year-end awards dinner the week of May 9th. Location TBD.
- Plan to attend Area 3 Council PTAs Transition Training the week of May 17th. Location TBD.
- Remember Teacher Appreciation Week.
- Make sure that your local unit's officers for next year have been elected and installed according to your local unit bylaws.
- Submit the Local Unit Officer Information sheet to Council and District by May 1st.
- Submit the Incoming Officer Information sheet to both Council and Georgia PTA no later than May 15. Enter online at www.georgiapta.org
- Make sure financial records are in order and turned over for audit in a timely manner.
- Finalize committee evaluations and make written recommendations for next year.
- Collect all up to date procedure books for each committee chair's successor.
- Transfer bank authorization with the treasurer and new officers. Newly elected officers assume their duties following the close of the current school year (follow your bylaws).
- Send thank-you notes to everyone who helped you with PTA this year.
- Celebrate your local unit's accomplishments.

Incoming President:

- Survey members for ideas for PTA activities and spending priorities for next year.
- Review your local unit bylaws.
- Make plans and reservations to attend the Georgia State Convention and Leadership Training Summer 2011.
- Appoint a parliamentarian.
- Work with your principal to set up school/PTA calendar for the next school year. Discuss PTA goals and procedures.
- Along with your Executive Officers appoint your Board of Directors.
- Prepare your PTA handbook / calendar for next year. Get it to the printers early so you will have it back in time for your school's registration day in August.
- Plan preliminary budget.



Outgoing Treasurer:

- ❑ Final preparation of books for financial review committee and audit.
- ❑ Transfer authorization of PTA funds to new officers. Newly elected officers shall assume their duties following the close of the current school year (follow your bylaws).

Secretary:

- ❑ Make sure officer information sheets have been sent to Council, District and Georgia PTA. Submit information online at www.georgiapta.org by May 15th.
- ❑ Make sure the binders with the meeting minutes and bylaws are in order for next year. File any documentation relevant to the meetings in the binders, as well.

Outgoing Officers and Committee Chairs:

- ❑ Organize and complete procedure book for successor. Meet with incoming officers to assure a smooth transition.