



Local PTA Planning Calendar 2017-18

The following calendar will help your PTA plan for a successful year!

Your Everett PTSA Council promotes leadership, teamwork, and support for all local PTAs in the Everett School District by serving as role models, providing resource materials, training and mentoring opportunities, and to act as an information channel to and from local PTAs. Please don't hesitate to contact us – we are here for you!



Everett PTSA Council 7.3

NEW Council Website: www.everettptsacouncil.org

JULY/AUGUST 2017

- Confirm all current Officers, BOD and Committee Chairs are input in **PTAvenue**.
- Update **bank signature cards**. Ask what documentation the bank needs prior to going.
- Complete year-end **financial review**. Treasurer may accept the books ONLY AFTER the year-end financial review is completed.
- Hold board of director **retreat** to get to know each other, discuss expectations, code of conduct, email etiquette, review mission and goals, review standing rules (need changes or updates / are they too complicated and long / are you following them?), review budget (need updating?), set membership and board meeting schedule, review end of year survey results, committee and event plan for the year, membership goal and theme, communication and social media plan, etc.
- Make sure all elected officers are aware of the annual **training requirement** and discuss how this requirement will be satisfied.
- Begin work on **membership campaign**, incentives, and forms.
- Make sure you have **contact information** for Angela Steck, Everett PTSA Council President and Jessica Giffin, Region 7 Director.
- **Corporate renewal** is due in the anniversary month when your PTA was incorporated. Know your date and mark your calendar so this is not forgotten!
- Set **calendar** – PTA events, membership and board of director meetings – include date/time/location. Complete facilities usage requests. Post this schedule on your PTA website and **invite your membership** through social media & email campaigns.
- Meet as a board of directors (even if you did a retreat) to **prepare** for the first membership meeting; coordinate information to be given to families at the beginning of the year (welcome letter and benefits of PTA, board contact information, calendar of meetings and events, membership form, volunteer opportunities, etc.).
- Update your **website** (as needed). What do parents need to know? Review the WSPTA Outstanding Website Award application for ideas to improve your website. Be sure to always have up-to-date Membership Meeting Schedule posted.
- Meet with your **principal** to review PTA goals, events, and programs. Establish a regular meeting schedule.
- Review Standards of Excellence Application and Best Practices Checklist to make sure you are on track all year long. Discuss what **Local PTA Awards of Excellence** you will apply for and designate a point person or committee to be in charge of entries.
- Attend Region 7 **Fall Conference** and pick up your **Leadership Packet** from Everett PTSA Council.
- Update **legal documents notebook** (if not done at the end of last year).
- Review **monthly financial statements**....yes, even in July and August!

SEPTEMBER 2017

- Attend Everett **Council Membership Meeting on Sept 20**, 6:30pm at the CRC followed by **WSPTA Approved Training**: Managing Your Non-Profit PTA (previously called Money Matters). Encourage your PTA Leaders to attend this training!
- Hold first **membership meeting**. Update your standing rules (requires motion). Does your budget need updating (requires motion)? Present and accept year-end financial review for the record (no motion required). Approve this year's goals. Approve any minutes from last year or summer that need to be accepted (no motion required). Discuss any leadership training done since the end of last year (i.e. Fall conference, leadership conference, PTA and the Law, etc.)
- Launch **membership campaign** (form, theme, membership benefits, how will you recognize members, announce goal, etc.)

- Review the **Standards of Affiliation** agreement with your board, sign and keep in your legal documents notebook.
- Offer a **committee chair training**.
- Kick off your **Reflections** program. 2017-2018 theme is “Within Reach.”
- Make sure WSPTA and Everett PTSA Council are aware of your **key committee chairs and contact information** - Reflections, Membership, Advocacy/legislative, and FACE (family and community engagement). Let them know of any changes or additions during the year.
- Review Best Practices and Standards of Excellence Award forms - are you on track to apply for **awards**?
- Speak at a **staff meeting** to introduce yourself, talk about membership, share the benefits of PTA, explain any grants, reimbursement forms, programs or events that directly affect staff, and anything else teachers will need to know.
- Participate in Curriculum Night and any other “welcome back” **school events**.
- Review **Nominating Committee** handbook and/or attend nominating committee training. Begin search for nominating committee - consider electing nominating committee at this first membership meeting.
- Submit Everett PTSA Council **Shoe Fund donation**.
- Read the WSPTA **Leadership Guide** materials and the WSPTA **Uniform Bylaw** sections that pertain to local PTAs.
- Review monthly financial statement.
- Sept 30 **Bronze Membership Award** deadline (no application): 50% of last year’s members enrolled. **Silver membership award** (5% increase), **Gold** (10% increase), and **Platinum** (20% increase) are awarded year-round as earned.
- Pay annual council \$50 fee and monthly **membership dues** invoice to WSPTA. Consider setting up automatic debits with WSPTA for monthly invoices.

OCTOBER 2017

- Everett Council **Shoe Fund** Donation (thank you for submitting your donation before this date!)
- Send Reflections Chair to Everett PTSA Council **Reflections training** (October 4th) at CRC. President attends if no Reflections Chair.
- WSPTA **Standards of Affiliation** (SOA) agreement – read, complete, sign, and retain in your legal documents notebook.
- Send representative(s) to **Legislative Assembly** (October 20-21 in Tacoma) and report information to your membership.
- Attend **PTA and the Law** (if you have not already done so) and report information to your membership.
- Review Best Practices and Standards of Excellence Award forms - are you on track to apply for **awards**?
- Solicit and/or elect **nominating committee** members if you have not already done so.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

NOVEMBER 2017

- Liability **Insurance renewal** due to AIM by November 10.
- Attend Everett **Council Membership Meeting on Nov 15**, 6:30pm at the CRC followed by **WSPTA Approved Training** (visit www.everettsptacouncil.org for complete list of trainings - there’s a training for everyone on your Exec Board!)
- **Federal taxes** (990, 990EZ, or 990 postcard) due November 15.
- Review Best Practices and Standards of Excellence Award forms - are you on track to apply for **awards**?
- Solicit and/or elect **Nominating Committee** members if you have not already done so. Contact Council for questions/support.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

DECEMBER 2017

- Turn in **Reflections submissions** that are advancing to Everett PTSA Council by December 1, from 10am – 5pm, PTA Office at CRC.
- Consider a mid-year board of directors bonding event/thank you/celebration!
- Review Best Practices and Standards of Excellence Award forms - are you on track to apply for **awards**?
- Solicit and/or elect **Nominating Committee** members if you have not already done so.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

JANUARY 2018 Happy New Year!

- Attend Everett **Council Membership Meeting on Jan 17**, 6:30pm at the CRC followed by Local PTA Leaders Roundtable.
- Announce and attend Everett PTSA Council **Reflections Celebration on January 3** from 5:00 – 8:00pm at CRC.
- Send representative(s) to **Focus Day** in Olympia (see Everett Council website or Everett Council PTSA 7.3 Facebook page for details.)
- Conduct **mid-year financial review**. Share results with membership at the next meeting.
- Combined **excise tax return** due to State Department of Revenue (only if you collected sales tax) – due (January 31st).
- Review Best Practices and Standards of Excellence Award forms - are you on track to apply for **awards**?
- Appoint **Awards Committee** (Golden Acorn-GA, Outstanding Educator-OE, Outstanding Advocate-OA & Student Advocate-OSA, and Honorary Lifetime-HL).
- Solicit and/or elect **nominating committee** members if you have not already done so.
- Review **monthly financial statement**.
- Launch **PTA Men's Essay contest**.
- Pay monthly **membership dues** invoice to WSPTA.

FEBRUARY 2018

- Provide **Focus Day report** to membership.
- Continue **Awards Committee** work (GA, OE, OA, OSA, and HL).
- Publish **Nominating Committee** report.
- Recognize/Celebrate **National PTA Founders Day** on February 17 (121st Anniversary).
- Appoint **Budget Committee**.
- Attend **Region 7 Spring Conference** and report back information to membership (may be in March).
- Finalize all WSPTA **Local PTA Award of Excellence applications** (Standards of Excellence, website, communication, etc.)
- Finalize all **Membership Award applications** (Seedling, Sapling, 100% Membership, 100% Teacher).
- Encourage your PTA leaders to participate in the WSPTA **Leadership Academy** program.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

MARCH 2018

- Can **officers** be elected this month?
- WSPTA **Local PTA Awards of Excellence** applications due March 1.
- **Leadership Academy** applications due March 1.
- **PTA Men's Essay** contest entries due March 1.
- Continue **Awards Committee** work (GA, OE, OA, OSA, and HL) and announce award recipients if possible.
- **WSPTA Scholarship** applications due to WSPTA by March 15.
- Attend Everett **Council Membership Meeting on Mar 21**, 6:30pm at the CRC followed by **Local PTA Leaders Roundtable**.
- Make plans for **WSPTA Convention** - who can attend, review budget, etc.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.
- **Outstanding Service Award** nominations due March 31 (statewide recognition).
- **Charitable Solicitations Act registration**/Annual report to Sec of State/**must be received** by March 31.

APRIL 2018

- Have you completed the annual training requirement? Must be completed prior to WSPTA Convention!
- Attend **WSPTA Convention** (May 18-20, Vancouver WA) and report information to membership.
- **Elect officers** for next year if you have not already done so!
- Continue **Awards Committee** work (GA, OE, OA, OSA, and HL) and announce award recipients if possible. Plan to send current award recipients to the **Everett PTSA Council Awards Recognition Banquet** in May (see www.everettptsacouncil.org for date & details).
- **Transition** with incoming officers - schedule meetings, trainings, invite them to attend remaining board of director meetings.
- **Survey** families, staff, committee chairs, and students to help plan and budget for next year.
- Review monthly financial statement.
- Pay monthly **membership dues** invoice to WSPTA.

MAY 2018

- National Teacher/Staff Appreciation Week – first week in May
- Continue **Awards Committee** work (GA, OE, OA, OSA, and HL) and announce award recipients if possible.
- Send award recipients to the Everett PTSA **Council Awards Recognition Banquet** held this month (see www.everettptsacouncil.org for event date and venue information).
- Attend Everett **Council Membership Meeting on May 31**, 6:30pm at the CRC followed by **WSPTA Approved Training**: Ready, Set, Go! Bring your incoming and outgoing Local PTA officers for Council-led transition support and training.
- **Charitable organization** due May 31.
- Work on filling in board of director and other **key committee chairs** that need to be working over the summer.
- Vote in next year's **budget** (if you have not already done so).
- Decide on **reimbursement deadline**.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.
- Remind all officers and committee chairs to update binders and/or digital records before the end of the year. Time to think about **transitions!**

JUNE 2018 Pat yourself on the back for the great work you have done! Be #PTAProud!

- Share your PTA **successes** with your members! What did you fund? What events and programs did you run? What educational goals did you support? What impact did you have on your school community? What awards did you win? Share the amazing year you had!
- Make sure incoming elected **officers** are entered in the WSPTA membership database.
- Approve next fiscal year **budget** no later than the June membership meeting (can update at future membership meeting if needed).
- **Volunteer appreciation** – executive committee, board of directors, committee chairs, volunteers, etc.
- Schedule your Summer Board of Directors **Retreat** before officers leave for summer vacations.
- Remind everyone about **reimbursement deadline**.
- Schedule year-end **financial review** for July.
- Continue working on filling in **board of director** and other **key committee chairs**, especially those that need to be planning over the summer (Reflections, membership, legislative/advocacy, family and community engagement, etc.) Enter these key committee chairs in the WSPTA membership database so they can be kept informed by council, region, and WSPTA.
- Prepare and plan for **transition**: Update all notebooks/flash drives/cloud files (officer and legal documents) and hand over all funds, supplies, and documentation that belongs to the PTA to the new officers by June 30th.
- Review **monthly financial statement**.
- Close the books! **Congratulations** on a fantastic school year!