

## Local PTA Planning Calendar 2021-2022

The following calendar can help your local 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!



<https://www.facebook.com/everettptsacouncil>

Council website: [www.everettptsacouncil.org](http://www.everettptsacouncil.org)



<https://twitter.com/EverettPTSA>



<https://www.instagram.com/everettptsa/>

### JULY/AUGUST

- 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 these requirements will be satisfied.
- Begin work on **membership campaign**, incentives, and forms.
- Make sure you provide your PTA Board **contact information** to your Everett PTSA Council President **Craig Willis** and Acting Region 7 Director **Tori Emerson**.
- **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 members** 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 **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 an up-to-date Membership Meeting schedule posted on your site.
- Meet with **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. Discuss what **Local PTA Awards of Excellence** you will apply for and designate a point person or committee to oversee entries.
- Participate in Region 7 **Fall Conference** and download any **leadership packet resources** from the 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

- Attend Everett PTSA Council Membership meeting on Wednesday, September 15, at 6:30 PM (held virtually).
- Attend WSPTA "**Autumn Leader Launch**" training event on September 16-18 (held virtually).

- Send Reflections Chair to Everett PTSA Council **Reflections training** on Wednesday, September 29 (held virtually).
- Kick off your **Reflections** program.
- Offer a **committee chair 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 (SOA)** agreement and review with the Board of directors and membership.
- Offer a **committee chair training**.
- Kick off your **Reflections** program.
- Make sure WSPTA and Everett PTSA Council are aware of your **key committee chairs and contact information** - Reflections, Membership, Advocacy, 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
- Submit Everett PTSA Council **Shoe Fund donation**.
- Read the WSPTA **Leadership Guide** materials and the WSPTA **Uniform Bylaw** sections that pertain to PTAs.
- Review **monthly financial statement**.
- Pay annual council \$50 fee and monthly **membership dues** invoice to WSPTA. Consider setting up automatic debits with WSPTA for monthly invoices.

## OCTOBER

- Review WSPTA **Standards of Affiliation** agreement.
- Send representative(s) to **Legislative Assembly** (October 23-24 - held virtually) and report back information to membership.
- Send Reflections Chair to Everett PTSA Council **Reflections training** (-Sept 30 – held virtually).
- 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

- Attend Everett PTSA Council Membership meeting on Wednesday, November 17, at 6:30 PM (held virtually).
- **Insurance renewal** due.
- **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.
- Turn in **Reflections submission** that are advancing to Everett PTSA Council
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

## DECEMBER

- 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 be doing 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

- Attend **Council Reflections Celebration** on Wednesday, January 5.
- Attend Everett PTSA Council membership meeting on Wednesday, January 19, at 6:30 PM (held virtually).
- 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 31<sup>st</sup>).
- 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, Honorary Lifetime-HL).
- Announce and share online Everett PTSA Council **Reflections Celebration**
- Send members to **Focus Day** in Olympia (January 16<sup>th</sup>) and report back information to membership.
- Solicit and/or elect **nominating committee** members if you have not already done so.
- Launch **PTA Essay** contest and encourage student participation
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

## FEBRUARY

- Continue **Awards Committee** work (GA, OE, OA, OSA, HL).
- Publish **nominating committee** report.
- Appoint **budget committee**.
- Finalize all WSPTA **Local PTA Award of Excellence applications** (Standards of Excellence, website, communication, etc.)
- Finalize all **Membership Award applications** (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

- Attend Everett PTSA Council membership meeting on Wednesday, March 16, at 6:30 PM (held virtually).
- Elect **officers** this month?
- WSPTA Essay Contest, Game Development and Scholarships (due March 1<sup>st</sup>)
- WSPTA Local PTA Awards of Excellence and the Leadership Service Award (due March 15)
- Continue **Awards Committee** work (GA, OE, OA, OSA, HL) and announce winners if possible.
- Make plans for WSPTA **Convention** - who can attend, review budget, etc.
- **Charitable Solicitations Act registration**/Annual report to Sec. of State **must be received** by March 31.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.

## APRIL

- Have you completed the annual training requirement? Must be completed prior to convention!
- **Elect officers** for next year if you have not already done so!
- Continue **Awards Committee** work (GA, OE, OA, OSA, HL) and announce winners if possible.
- **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

- Attend Everett PTSA Council membership meeting & Volunteer Appreciation May 18. Bring your outgoing & Incoming officers for Council-led transition support.
- Continue **Awards Committee** work (GA, OE, OA, OSA, HL) and announce recipients if possible. Send recipients' names to the Everett PTSA Council Awards Celebration chair.
- Local PTA award winners (GA, OE, OA, OSA, HL) invited to attend **Council Awards Celebration** on Thursday, May 19.
- Attend **WSPTA Annual Convention** (May 20-22; more details to come!) and report information to membership.
- **Charitable organization** due (May 31<sup>st</sup>).
- National Teacher/Staff Appreciation Week – first week of May
- Work on filling in board of director and other **key committee chairs** that need to be working over the summer.
- Approve next fiscal year **budget** if no June meeting planned (can update at future membership meeting if needed).
- Decide/announce **reimbursement deadline**.
- Review **monthly financial statement**.
- Pay monthly **membership dues** invoice to WSPTA.
- Remind all officers and committee chairs to update their binders before the end of the year. Time to think about **transition!**

## JUNE – 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?
- 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 summer board of directors' **retreat**.
- 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, advocacy, FACE, 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!