

# Suggested Calendar for All PTA Officers

## July

- Attend the Annual Florida PTA Leadership Convention.
- Enter **"New and Returning Officers' Information"** online on the Florida PTA website at [www.floridaPTA.org](http://www.floridaPTA.org). Officers' information must be entered every year, whether or not the officers are serving for a second term. Information **MUST** be entered for President, Treasurer and Secretary, **INCLUDING HOME ADDRESSES, a valid and separate email for each, as well as a phone number.**
- Keep officers' information updated throughout the year. If there is a change, enter "Change of Officers Information" online on the Florida PTA website.
- Make sure audit/financial review is completed before the incoming Treasurer takes custody of the treasurer books. Current President and Treasurer are required to sign the second page of the audit report.
- After audit is completed, make arrangements at bank to change the signatories on the bank account(s). You are required to have three signers on the bank account(s). Change all log-ins and passwords for e-banking and debit/credit cards.
- Encourage all members to subscribe to the *Florida PTA e-Newsletter* on the website at [www.floridapta.org](http://www.floridapta.org) (President, Secretary and Treasurer are automatically entered from Officer Registration Form).
- **Prepare required Federal annual IRS Form 990. Form 990 due by November 15th** (see Section 3 - Dollar\$ and \$en\$e for details).
- Create a membership campaign.

## August

- Share and implement information learned at Leadership Convention.
- Call board together to review the information in this guide, Florida PTA Kit of Materials and National PTA Local Leader Kit ([www.pta.org](http://www.pta.org)).
- Discuss (and distribute) the suggested guidelines in this kit and familiarize each officer and committee chair with their duties.
- Advise board members to obtain all materials from their predecessors. If procedure books are not already being kept, start them NOW.
- Study your local bylaws. Review or amend them if necessary. (See local unit Bylaws Guide and form.)
- Provide a copy of the approved bylaws to all members of your board of directors. Make copies of bylaws available to members.
- Pay County Council Dues (if any).
- Prepare a proposed budget. Begin to develop program plans for the year to include in the budget.
- When preparing your plan of work / budget, include sufficient funds to send delegates to the annual Florida PTA Leadership Convention next summer, legislative activities in Tallahassee, and the National PTA Convention next summer.
- Download the REFLECTIONS rules and entry forms from the Florida PTA website, [www.floridapta.org](http://www.floridapta.org).
- Plan activities for Membership Enrollment month (September).
- Review criteria for awards in the *Awards Section* on the website, [www.FloridaPTA.org](http://www.FloridaPTA.org), and in the Kit of Materials.
- Subscribe to *e-Newsletters* from Florida and National PTA
- Begin membership enrollment.
- Welcome the teachers in your school.
- Plan to have the membership committee enroll members on school registration days.
- Remind Treasurer to send membership dues collected to date to the Florida PTA state office. Dues are to be sent monthly, as collected.
- Send a copy of your local unit Audit/Financial Review for the prior fiscal year to: [audit@floridapta.org](mailto:audit@floridapta.org) (due by August 31st).



## September

- Promote subscriptions to the *Florida PTA e-Newsletter* and *National PTA e-Newsletter* ([www.pta.org](http://www.pta.org)).
- Display Purposes Chart.
- Attend county council meetings and training workshops.
- Begin process to develop Resolution for submittal to Florida PTA (see website [www.floridapta.org](http://www.floridapta.org)).
- Remind your Treasurer to submit state and national portion of membership dues collected to date. Submit dues through MemberHub or by check. If submitting by check, please send with Dues Payment Form on the website (under PTA Leaders Tab).

Submit an application form online before **October 1** if dues submitted meets criteria for the **Golden Early Bird Award**.

## October

- Attend county council meetings and leadership training workshops.
- Urge membership to subscribe to *Florida PTA e-Newsletter* and *National PTA e-Newsletter*.
- Plan to observe American Education Week in November.
- Continue development of Florida PTA Resolution.
- Remind your Treasurer to submit state and national portion of membership dues collected to date. Submit an application form online before **November 1** if dues submitted meets criteria for the **Silver Early Bird Award**.

## November

- **Deadline to file required Federal IRS Form 990 return is November 15.**
- Email a copy of IRS 990 to [990@floridapta.org](mailto:990@floridapta.org). The copy can be mailed or faxed.
- Attend county council meetings and workshops.
- Observe American Education Week.
- Remind your Treasurer to submit state and national portion of membership dues collected to date. Submit an application form online before **December 1** if dues submitted meets criteria for the **Bronze Early Bird Award**.

## December

- Check Deadline to advance Reflections winners to County Council
- Submit dues to the State Office in order to be eligible for the Reflections Program.
- Make plans to attend Legislative Activities in Tallahassee.
- Survey the community for new members and invite them to join and support your PTA.
- Finalize Resolution for submittal before due date.
- Use the spirit of the holiday season in recognizing and thanking all who helped or those that have made outstanding contributions to the school-community.

## January

- Finalize plans to attend Legislative Activities in Tallahassee.
- Reflections due to state office through Council.
- Organize mid-year membership enrollment for new parents in your community.
- Work on procedure book and history of your association.
- Support the Action Platform of the Florida PTA.
- Attend county council meetings and workshops.
- Send proposed resolution items to state office by deadline ([www.floridapta.org](http://www.floridapta.org)).
- Participate in legislative activities.



## February

- February 1st—deadline to complete the online Florida PTA High School Scholarship Application.
- Participate in legislative activities in Tallahassee.
- Observe Founders Day (February 17) with a program honoring national, state and local founders. (May be done in a different month if more convenient.)
- Send a Founders Day gift/donation (a free-will birthday offering) to the Florida PTA Office.
- **Elect nominating committee, according to procedure in your local unit bylaws.**
- Attend county council meetings and leadership training workshops.
- Apply for Phoebe Apperson Hearst National PTA Excellence in Education Partnership Award ([www.pta.org](http://www.pta.org)).
- Participate in legislative activities.

## March

- Attend Legislative activities in Tallahassee.
- Remind Treasurer to remit Founders Day donation payment to the Florida PTA Office.
- Dues **must** be paid before applying for all membership awards.
- Check deadline for National PTA Awards at [www.pta.org](http://www.pta.org).

## April

- Make plans to attend the Annual Florida PTA Leadership Convention.
- Attend county council meetings and workshops.
- Elect new officers, complete online Officer Registration Form. ([www.FloridaPTA.org](http://www.FloridaPTA.org))
- Observe Child Abuse Prevention Month.
- Be sure all Florida PTA Award applications due by May 1 have been completed in sufficient time.
- Remit membership dues through MemberHub or to the Florida PTA office; Membership **dues must be received by the Florida PTA office on or before May 1 for awards purposes.** They will be included in Florida's report to National PTA for the current year. After May 2nd, membership dues will not be credited for Florida PTA award purposes to the current year.

## May

- **May 1st—Deadline for:**
  - **Membership Awards**
  - **Program Awards**
- Check bylaws for month to elect and install new officers.
- **After election of officers, complete online New & Returning Officers Information.** Officer's information must be sent annually even if they are serving the second consecutive term.
- Appoint an audit committee of three members who are non-signers on the bank account.
- Have a combined board meeting of old and new officers and committee chairs so that retiring members may pass on procedure books to incoming members, and plans may be discussed for the upcoming year.
- Make plans to attend the Florida PTA Leadership Convention in July.
- Attend county council meetings and Leadership Training Workshops.
- Observe Florida Teacher Day and National PTA Teacher Appreciation Week.
- Make sure your Treasurer remits any additional dues collected before the end of your current school year to the state office.
- Register to attend the Florida PTA Leadership Convention in July.

## June

- Finalize plans to attend the Annual Florida PTA Leadership Convention in July.
- After June 30, when the final bank statement is received, Treasurer must organize the books and records to give to the appointed audit committee.

**THANK YOU FOR ALL YOU DO FOR CHILDREN!!!**