

# Checklist for Running Your PTA: A Month-By-Month Board To-Do List

**July:** Welcome to the new PTA year! PTA’s fiscal year runs July 1 – June 30. The dates listed reflect best practices.

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend board and membership meetings</li> <li><input type="checkbox"/> Read meeting minutes and offer corrections</li> <li><input type="checkbox"/> Prepare reports for board and membership meetings</li> <li><input type="checkbox"/> Take advantage of in-person and online training opportunities</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Be familiar with your responsibilities and fulfill them</li> <li><input type="checkbox"/> Review and ask questions about monthly financial report</li> <li><input type="checkbox"/> Prepare content for newsletter or social media</li> <li><input type="checkbox"/> Review and update your website</li> <li><input type="checkbox"/> Participate, help others, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Financial Review</b> Complete a year-end financial review.</li> <li><input type="checkbox"/> <b>Change bank account signers</b> Make an appointment at the bank to change account signers. Verify their process and necessary documents in advance.</li> <li><input type="checkbox"/> <b>Update all passwords for online accounts after July 1</b></li> <li><input type="checkbox"/> <b>Plan a board retreat</b></li> <li><input type="checkbox"/> <b>Review the newly amended <i>WSPTA Uniform Bylaws</i></b> Located on the <a href="#">Governance page</a> of the WSPTA website.</li> <li><input type="checkbox"/> <b>Update job descriptions for board positions</b></li> <li><input type="checkbox"/> <b>Update contact information on websites, social media, and with the school or district</b></li> <li><input type="checkbox"/> <b>Enter names and contact information for all elected officers and key no-elected positions in the membership database; update throughout the year.</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review and update the legal documents notebook(s)</b></li> <li><input type="checkbox"/> <b>Review material to go in the first day packets or summer mailers</b> Do prep work, such as printing.</li> <li><input type="checkbox"/> <b>Prepare to launch your fall membership drive</b> Review your membership form, set your theme, decide on any benefits and how will you recognize members, and announce goals.</li> <li><input type="checkbox"/> <b>Plan and prepare for volunteer and committee chair training</b></li> <li><input type="checkbox"/> <b>Plan for back-to-school days in August</b> Gather commitments from volunteers.</li> <li><input type="checkbox"/> <b>Was your PTA incorporated in July?</b> If so, then your annual Corporation Renewal is due by <b>7/31</b>. The annual corporation report is due regardless of your PTA’s annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## August:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Get educated: take advantage of in-person and online training opportunities</li> </ul>	<ul style="list-style-type: none"> <li>❑ Be familiar with your responsibilities and fulfill them</li> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter or social media</li> <li>❑ Review and update your website</li> <li>❑ Participate, help others, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Financial Review</b> Complete year-end financial review by August 31.</li> <li>❑ <b>Update calendar for membership meetings or PTA activities for the year</b> Make sure your public-facing calendar is up-to-date for your members.</li> <li>❑ <b>Speak at the August school staff meeting (with permission)</b> Coordinate with the principal. Introduce yourself, talk about membership, share the benefits of PTA, explain any grants, reimbursement forms, programs, or events that directly affect staff.</li> <li>❑ <b>Hold your first board meeting/retreat</b> As a board:               <ul style="list-style-type: none"> <li>○ Set goals.</li> <li>○ Prepare for your first membership meeting,</li> <li>○ Review your budget and standing rules, and recommend these documents for approval at your first membership meeting.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Begin search for potential nominating committee members</b></li> <li>❑ <b>Review your board structure for next year</b> Changes in board structure need to be approved in standing rules before the nominating committee is elected.</li> <li>❑ <b>Attend your region's fall conference</b></li> <li>❑ <b>Share online WSPTA leader resources with all officers</b></li> <li>❑ <b>Start your membership drive</b></li> <li>❑ <b>Was your PTA incorporated in August?</b> If so, then your annual Corporation Renewal is due by <b>8/31</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## September:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Attend training</li> <li>❑ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter or social media</li> <li>❑ Review and update your website</li> <li>❑ Participate, help others, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Hold an executive committee or board meeting</b> <ul style="list-style-type: none"> <li>○ Appoint a Financial Review Committee.</li> <li>○ Review the WSPTA Standards of Affiliation checklist and assign tasks.</li> <li>○ Discuss how the training requirement will be met and tracked.</li> </ul> </li> <li>❑ <b>Register to attend WSPTA Legislative Assembly</b></li> <li>❑ <b>Participate in Curriculum Night and other back-to-school events</b></li> <li>❑ <b>Hold Committee Chair training</b> Share the updated WSPTA leader resources, including handbooks.</li> <li>❑ <b>Hold first membership meeting</b> <ul style="list-style-type: none"> <li>○ Update and approve your standing rules, goals, and/or budget.</li> <li>○ Review the approved budget with members even if there are no changes since it was approved.</li> <li>○ It is a best practice to elect your nominating committee at this meeting.</li> <li>○ Present the results of the year-end financial review for the record.</li> </ul> </li> <li>❑ <b>Make sure at least one elected officer attends PTA &amp; the Law</b> Get all board members trained early!</li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Launch a membership drive if you have not done so already</b></li> <li>❑ <b>Pay monthly membership invoice to WSPTA</b> Fees are invoiced monthly via email and are due upon receipt. Consider setting up automatic debits with WSPTA for monthly invoices.</li> <li>❑ <b>Start promoting Reflections and get your chair trained</b> Add council and/or state due dates to the calendar.</li> <li>❑ <b>For secondary PTAs, start promoting the WSPTA//Game Development Competition</b></li> <li>❑ <b>Review Awards of Excellence and Membership Awards forms</b> Plan now to apply for awards.</li> <li>❑ <b>Make sure committee chair and board contact information is in the membership database.</b> Include Reflections, membership, advocacy/legislative, and FACE. Let WSPTA know of any changes or additions during the year.</li> <li>❑ <b>Was your PTA Incorporated in September?</b> If so, then your annual Corporation Renewal is <b>due on 9/30</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/ Renewal.</li> </ul>

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## October:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend board and membership meetings</li> <li><input type="checkbox"/> Read meeting minutes and offer corrections</li> <li><input type="checkbox"/> Prepare reports for board and membership meetings</li> <li><input type="checkbox"/> Attend training</li> <li><input type="checkbox"/> Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review and ask questions about monthly financial report</li> <li><input type="checkbox"/> Prepare content for newsletter/social media</li> <li><input type="checkbox"/> Update website</li> <li><input type="checkbox"/> Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review tasks from previous months related to nominating committee</b> If you did not elect a nominating committee in September, be prepared to do this at your next membership meeting.</li> <li><input type="checkbox"/> <b>Attend WSPTA Legislative Assembly</b> Report back to members at the next meeting. Make sure your list of voting delegates is submitted to WSPTA by October 12.</li> <li><input type="checkbox"/> <b>Complete all board training by end of the month</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Check National PTA website</b> There are grant opportunities such as STEM+Families grants or program opportunities such as the Schools of Excellence program (enrollment deadline is October 15).</li> <li><input type="checkbox"/> <b>Was your PTA Incorporated in October?</b> If so, then your annual Corporation Renewal is <b>due on 10/31</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## November:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>□ Attend board and membership meetings</li> <li>□ Read meeting minutes and offer corrections</li> <li>□ Prepare reports for board and membership meetings</li> <li>□ Attend training</li> <li>□ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>□ Review and ask questions about monthly financial report</li> <li>□ Prepare content for newsletter/social media</li> <li>□ Update website</li> <li>□ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>□ <b>Insurance payments due</b></li> <li>□ <b>IRS Filings (990 or 990EZ or postcard) due November 15</b></li> <li>□ <b>Elect nominating committee at a membership meeting if not previously done</b> When elected, update the committee materials/notebook and schedule overview meeting with committee</li> <li>□ <b>WSPTA Officer Nominations due November 15</b> Consider nominating a leader from your PTA to serve on the WSPTA board of directors or encourage a leader to self-nominate for a position to be elected at the 2019 convention.</li> </ul>	<ul style="list-style-type: none"> <li>□ <b>WSPTA Uniform Bylaws Amendments due November 15</b> The WSPTA bylaws are built and approved by the members. If your PTA sees an area in the bylaws that is unclear, or you feel should be revised, then your PTA should consider submitting an amendment for consideration.</li> <li>□ <b>Was your PTA Incorporated in November?</b> If so, then your annual Corporation Renewal is <b>due on 11/30</b>. the annual corporation is due regardless of the income you bring in and is separate from the Charitable Organization Registration/ Renewal.</li> </ul>

## December:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Attend training</li> <li>❑ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter/social media</li> <li>❑ Update website</li> <li>❑ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Consider a holiday party</b> You are halfway through the PTA year!</li> <li>❑ <b>Plan a winter membership campaign</b></li> <li>❑ <b>Mid-year financial review</b> Consider doing a mid-year financial review in January. Gather a committee and set a date to do the review.</li> <li>❑ <b>Registered agent</b> Double-check who the registered agent is for your PTA for the Secretary of State and the IRS. Consider changing to Washington State PTA as your registered agent if not already designated as such. WSPTA is a constant address that does not need to be changed or updated each year and is one of the benefits of affiliation.</li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Appoint an awards committee</b> Consider the following WSPTA awards, as well as any special awards from your school: Golden Acorn, Outstanding Educator, Outstanding Advocate and Student Advocate, Honorary Lifetime Membership. Proceeds from the purchase of these awards fund student scholarships.</li> <li>❑ <b>Was your PTA incorporated in December?</b> If so, then your annual Corporation Renewal is <b>due on 12/31</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/ Renewal.</li> </ul>

## January:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Attend training</li> <li>❑ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter/social media</li> <li>❑ Update website</li> <li>❑ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Reflections entries due to WSPTA by January 18</b></li> <li>❑ <b>Conduct a mid-year financial review as a best practice</b></li> <li>❑ <b>Review goals and objectives set at the beginning of the year</b> Are you on track? Do you need to make adjustments? Have you been sharing progress with your members?</li> <li>❑ <b>Engage in a winter membership campaign</b> How close are you to applying for a Membership Achievement Award (applications due March 1)?</li> <li>❑ <b>Review Best Practices and Standards of Excellence forms</b> Gather information for award binders (applications due March 1).</li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Determine other <a href="#">Awards of Excellence</a> awards to apply for</b> (applications due March 1) <ul style="list-style-type: none"> <li>○ Advocacy Award of Excellence</li> <li>○ Family and Community Engagement Award of Excellence</li> <li>○ Outstanding Communication Strategy</li> <li>○ Outstanding E-Blast</li> <li>○ Outstanding Newsletter</li> <li>○ Outstanding PTA of the Year</li> <li>○ Outstanding Website</li> <li>○ PTAs Taking Significant Action</li> </ul> </li> <li>❑ <b>Accept nominations for volunteer awards such as Golden Acorn</b></li> <li>❑ <b>1099-MISC due for independent contractors</b></li> <li>❑ <b>Annual Combined Excise Tax form due to Department of Revenue by January 31 to remit sales/use tax (if applicable)</b></li> <li>❑ <b>Was your PTA Incorporated in January?</b> If so, then your annual Corporation Renewal is <b>due on 1/31</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## February:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Attend training</li> <li>❑ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter/social media</li> <li>❑ Update website</li> <li>❑ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Apply for a WSPTA <a href="#">Award of Excellence</a> this month</b> Due March 1.</li> <li>❑ <b>Apply for a WSPTA <a href="#">Membership Achievement</a> award – 100% membership or 100% staff</b> Due March 1.</li> <li>❑ <b>Encourage your leaders to participate in WSPTA’s <a href="#">Leadership Academy</a></b> Due March 1.</li> <li>❑ <b>Launch the PTA <a href="#">Men’s Essay Contest</a></b> Deadline for submissions is March 1.</li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>High school PTAs should advertise the WSPTA <a href="#">scholarship program</a></b> Deadline for students: March 1.</li> <li>❑ <b>Attend a winter training or conference in your region (if offered) or participate in a webinar</b></li> <li>❑ <b>Make sure your nominating committee is in place</b></li> <li>❑ <b>Was your PTA Incorporated in February?</b> If so, then your annual Corporation Renewal is <b>due on 2/28</b>. The annual corporation report is due regardless of your PTA’s annual income and is separate from the Charitable Organization Registration/ Renewal.</li> </ul>



## March:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Attend training</li> <li>❑ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter/social media</li> <li>❑ Update website</li> <li>❑ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Submit WSPTA Award of Excellence</b> Due March 1.</li> <li>❑ <b>Submit WSPTA Membership Achievement award – 100% membership or 100% staff</b> Due March 1.</li> <li>❑ <b>Submit WSPTA individual state-level award nominations</b> Due March 1.</li> <li>❑ <b>Submit WSPTA’s Leadership Academy form</b> Due March 1.</li> <li>❑ <b>Remind members of PTA Men’s Essay Contest deadline</b> Deadline for submissions is March 1.</li> <li>❑ <b>Remind students of WSPTA//Game Development Competition deadline</b> Deadline for students: March 1.</li> <li>❑ <b>Remind students of WSPTA scholarship program deadline</b> Deadline for students: March 1.</li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Nominating committee completes search for next year’s board by March 31</b> Proposed slate of officers must be publicly posted 15 days prior to the membership meeting.</li> <li>❑ <b>Survey membership to identify priorities for the coming year</b> Essential information for budget planning.</li> <li>❑ <b>Consider providing volunteer recognition with a Golden Acorn or other WSPTA individual award.</b></li> <li>❑ <b>Treasurer recruits a budget committee to draft next year’s budget</b> Have the committee approved by the board.</li> <li>❑ <b>Make plans to attend WSPTA Convention</b></li> <li>❑ <b>Was your PTA Incorporated in March?</b> If so, then your annual Corporation Renewal is <b>due on 3/31</b>. The annual corporation report is due regardless of your PTA’s annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## April:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>□ Attend board and membership meetings</li> <li>□ Read meeting minutes and offer corrections</li> <li>□ Prepare reports for board and membership meetings</li> <li>□ Attend training</li> <li>□ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>□ Review and ask questions about monthly financial report</li> <li>□ Prepare content for newsletter/social media</li> <li>□ Update website</li> <li>□ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>□ <b>At the April board meeting, have the budget committee present the budget</b> The board votes to recommend it to the membership at the next membership meeting.</li> <li>□ <b>Elect new officers and approve the proposed budget at a membership meeting</b> Officers must be elected by June 30, but sooner allows time for transitions and training.</li> <li>□ <b>Report new officers to WSPTA in the membership database.</b></li> <li>□ <b>Complete WSPTA Standards of Affiliation (SOA) training requirement prior to WSPTA Convention</b></li> <li>□ <b>Encourage officers to attend WSPTA Convention</b> Counts as training for the following year.</li> </ul>	<ul style="list-style-type: none"> <li>□ <b>Consider opportunities for volunteer recognition</b> Check your standing rules for applicable individual volunteer recognition awards such as the Golden Acorn.</li> <li>□ <b>Celebrate WSPTA's Founder's Day on April 14</b> WSPTA was founded in 1905 by Abby Williams Hill.</li> <li>□ <b>Was your PTA Incorporated in April?</b> If so, then your annual Corporation Renewal is <b>due on 4/30</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## May:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li>❑ Attend board and membership meetings</li> <li>❑ Read meeting minutes and offer corrections</li> <li>❑ Prepare reports for board and membership meetings</li> <li>❑ Attend training</li> <li>❑ Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li>❑ Review and ask questions about monthly financial report</li> <li>❑ Prepare content for newsletter/social media</li> <li>❑ Update website</li> <li>❑ Participate, help, and communicate</li> </ul>
<b>Monthly Tasks</b>	
<ul style="list-style-type: none"> <li>❑ <b>Work with the treasurer to set June deadlines for reimbursements</b> Get word out to volunteers and school staff.</li> <li>❑ <b>Plan transition meetings for outgoing and incoming board members</b></li> <li>❑ <b>Work with incoming board members to identify candidates for non-elected board and chair positions</b></li> <li>❑ <b>Hold the last membership meeting to complete unfinished business</b> <ul style="list-style-type: none"> <li>○ Approve the budget and approve any changes to the standing rules.</li> <li>○ Review yearly goals and objectives set in September.</li> <li>○ Consider updating your budget to allow for 2019-2020 membership pre-sales.</li> <li>○ Standing rules updates may include removing reference to an exact membership fee amount and changing to say something like, "Membership dues will not exceed \$15 for an individual member." This will allow flexibility for your board to adjust your dues amount if a dues increase from National PTA is approved by the membership at the convention in June.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>❑ <b>Continue to report new officers to WSPTA in the membership database.</b></li> <li>❑ <b>Charitable Solicitations Renewal due May 31.</b></li> <li>❑ <b>Was your PTA Incorporated in May?</b> If so, then your annual Corporation Renewal is <b>due on 5/31</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>

## June:

<b>Ongoing Tasks</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend board and membership meetings</li> <li><input type="checkbox"/> Read meeting minutes and offer corrections</li> <li><input type="checkbox"/> Prepare reports for board and membership meetings</li> <li><input type="checkbox"/> Attend training</li> <li><input type="checkbox"/> Be familiar with your responsibilities and fulfill them</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review and ask questions about monthly financial report</li> <li><input type="checkbox"/> Prepare content for newsletter/social media</li> <li><input type="checkbox"/> Update website</li> <li><input type="checkbox"/> Participate, help, and communicate</li> </ul>
<b>Monthly Tasks for the Outgoing Board of Directors</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Share your PTA successes with your members</b></li> <li><input type="checkbox"/> <b>Prepare materials for transition</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> All materials, including notebooks, funds, and supplies that belong to the PTA should be given to incoming officers by June 30.</li> <li><input type="checkbox"/> Make sure the incoming board has the latest version of your standing rules, any policies, and be prepared to turn over access to any electronic files or accounts such as your website and Facebook page.</li> </ul> </li> <li><input type="checkbox"/> <b>If you are returning to your position, organize the year's materials and documents and prepare for a new PTA year.</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>If you are leaving your position, hold a transition meeting with your replacement.</b></li> <li><input type="checkbox"/> <b>Close PTA books on June 30 and turn the books over to the financial review committee.</b></li> <li><input type="checkbox"/> <b>Print a hard copy of your membership roster</b> File it with your permanent records.</li> <li><input type="checkbox"/> <b>Was your PTA Incorporated in June?</b> If so, then your annual Corporation Renewal is <b>due on 6/30</b>. The annual corporation report is due regardless of your PTA's annual income and is separate from the Charitable Organization Registration/Renewal.</li> </ul>
<b>Monthly Tasks for the Incoming Board of Directors</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Schedule a summer board retreat and next year's membership meetings</b></li> <li><input type="checkbox"/> <b>Meet with the school staff to discuss policies, calendars, and back-to-school volunteer needs</b></li> <li><input type="checkbox"/> <b>Begin work on "first-day packet" or "summer mailer" documents</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Communicate expectations with board members and chairs that need to get started in August</b></li> <li><input type="checkbox"/> <b>Ask the principal if you may speak at an August staff meeting</b> Inform teachers of grant options, classroom support, and PTA programs.</li> </ul>