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Annual Checklist

Upon Election/Summer

- Officers/Chairmen attend training opportunities provided by state, district and council PTA. Work with predecessor to understand job responsibilities.
- Preliminary budget prepared, get authorization for summer expenditures
- Distribute PTA materials to the appropriate officer/chairman
- Be sure officers/chairmen receive procedure books
- Prepare for back to school activities
- Begin preparing taxes for November filing
- Check with council/district for meeting schedules and training opportunities

September/October

- Prepare for the first association meeting; remind officers of their roles in the meeting. Secretary needs to have minutes from prior association meeting for approval, treasurer needs to present budget and treasurer report, auditor needs to present audit of the preceding fiscal year.
- Continue preparing taxes for November filing
- Remind treasurer to remit per capita monthly with proper paperwork

November/December

- Forward proposed resolutions in time for action by council/district
- Remind treasurer to remit per capita, insurance and Workers Comp forms
- File all taxes by 11/15, no exceptions depending on fiscal year end.
- Financial officers should be preparing for the audit

January/February

- Conduct election of nominating committee at an association meeting
- Prepare for Founders Day program; may include Honorary Service Award presentations
- Remind treasurer to remit final per capita through channels to meet the membership year-end
- Begin planning for convention representation

March/April

- Conduct the election of officers at the annual meeting
- Work with the historian on the unit's Annual Report
- Begin transition with president-elect
- COMPLETE THE JOB

May/June

- Prepare for the final association meeting
 - Motions for executive board to pay summer bills and appoint committee to read and approve minutes of last meeting
- Present procedure book to president-elect; follow up with officers/chairmen for same
- Work with the president-elect to plan an installation.
- Be available for advice - **when asked**