

Preparing for the next school year begins earlier than you think. Here are a few pointers to help get the next year off to a great start. A complete checklist for the year can be found on the Council Website: <http://www.issaquahptsa.org/pta-monthly-checklist-2017-18>

**Prepare to participate in your school’s new student registration parent nights** (Kindergarten Roundup/5th Grade Parent Night/ 8th Grade Parent Night) These typically begin after the 2nd Winter Break

* Make up flyers or tri-fold boards emphasizing what you do for the students
* Show how your budget and grant funds are spent to support all students
* Remember these are the parents who are devouring every printed piece of paper from the new school their child will attend next year – Be brief but impactful – too much information can work against you
* Do you have 100% staff or Membership awards – let the new parents know
* Do you have fun volunteer opportunities the students look forward to each year?
* Most of all – show up, be part of the welcoming committee, smile, be helpful, and answer questions

**March – Surveys**

While the Nominating Committee is working hard to build a slate for the upcoming year – take this time to ask your committee chairs to answer a few budget questions

* Did you have enough funds to accomplish your committee tasks?
* Is there something they wanted to do, but couldn’t because of budget constraints?
* Did you not use the funds budgeted to your committee?
* Did you turn in all of your receipts for reimbursement? If not, how much out of pocket did you spend?
* Would you consider returning as the chairperson next year?

Now is also a good time to plan an end of year survey of your membership

* Contact Council’s Webmaster to send out a Survey Monkey survey
* The Webmaster will send you a link you can then send out to your membership

**April to June – Current Board**

* Don’t forget to name your bank signers for next year at the same meeting as the election, this will put all the information on the same meeting minutes
* After the election invite the incoming executive officers to your next board meeting
* Plan a stand-alone transition meeting with all outgoing and incoming officers
* Presidents – invite your incoming president to the next meeting with the building administration
* Presidents – invite the incoming president to the Council Luncheon in May
* Remember – your board is still in charge until June 30 – don’t delegate everything to the new board before their time – work with them to ensure a smooth transition
* Make sure the Financial Review committee is appointed to conduct the End of Year Financial Review and that the Review is completed by the end of July

**Incoming Board – Before the end of the school year**

* Official start date: July 1
* Participate in the budget process – and ensure you have a budget approved by/at the last meeting of the year (otherwise you will not be able to spend any funds over the summer)
* Meet with your principal or the principal’s secretary to schedule your meetings with the principal for the next year
* If your PTA/PTSA meets in the school – Once you determine your calendar (meeting dates) turn in the Facilities Use Application. PTAs/PTSAs are normally given priority over other groups – to take full advantage of this, turn in your forms by June 1 or your meeting space could be reserved by another group
* Schedule a Retreat before all your board members disappear for the summer
* Check the PTA/PTSA message on your school’s Early Verification Process to make sure there is a link to your PTA/PTSA website (the principal’s secretary should have the information for you)
* Collaborate and work with the current board to make sure you are ready to go on July 1
* Don’t Forget to attend Council Training in June (this counts toward the required training for elected officers)

**Incoming Board – July/August**

* Once the End of Year Financial Review has taken place make sure to update the bank signers
* Remember, in order to conduct any financial transactions over the summer you need an approved budget, a completed financial review, and updated bank signers

**Training Requirements for Elected (Executive) Officers**

* All elected officers must attend one Washington State PTA official trainings
* One elected officer must attend PTA and the Law
* The WSPTA Convention counts as training for the upcoming year
* All officers must be trained prior to the Annual WSPTA Convention