

**Summer Checklist
District 1 PTA
Local Unit PTA Presidents**

Upon Election April/May/June:

- ✓ Work with outgoing President (your predecessor) to understand the president responsibilities for your local unit.
- ✓ Work with your incoming treasurer to start your budget priorities for the upcoming year (part of the working budget process you will need accomplish and have the general membership approve before school is out –see below).
- ✓ Assure that the roster of elected officers has been submitted to your state and district PTA board of director's president. THIS IS YOUR LOCAL UNIT OFFICER REPORT (LUOR).
- ✓ Review your local unit bylaws, the leader toolkit and insurance guide.
- ✓ Check out district, state, and national PTA websites for additional information you may need.
- ✓ Host a "book swap" between the outgoing PTA board officers and your incoming board officers before school is out!
- ✓ Meet with your principal to establish rapport and get his/her input into the PTA-at-a-glance calendar and other PTA-sponsored events so that you can begin planning your year. Set a regular meeting schedule with the principal for your year as president.
- ✓ Stay in touch with outgoing president and treasurer to establish and get approval of your summer "working budget" for expenditures you may incur during the summer months such as spirit wear purchases etc.
- ✓ Meet with the outgoing president and treasurer to ensure to that the financial review has been scheduled and that it will be completed in early July with the follow up IRS 990 filed upon the completion of the financial review. This really should be completed by August 1st. The financial review form and copy of the 990 filing is the responsibility of the outgoing president and treasurer

July/August:

- ✓ Meet with your executive officers (president, vice presidents, secretary, treasurer) and any key committee chairs to make sure they know their responsibilities and can begin their work for next year.
- ✓ Set your fundraising goals and begin to work with fundraising vendors to determine what fundraisers you will have during your year as president.
- ✓ Select a vendor and design your spirit wear if your PTA/PTSA does this. Be sure to work with your principal on the design and wording for his/her approval.
- ✓ Attend summer leadership training by SCPTA and District 1PTA. Make sure your treasurer, secretary, Reflections chair, and other key officers attend as well.
- ✓ Secure a copy of the District 1 PTA Handbook for your local unit files.
- ✓ Prepare your back-to-school packets for parents AND teachers:
 - Include a welcome letter from the president
 - PTA-at-a-glance calendar for parents AND Greenville County Schools calendar (on website)
 - A PTA membership form to complete and return (be sure to strive for 100% membership)
 - A PTA/PTSA volunteer form to complete and return
 - Spirit Wear order form
 - PTA/PTSA fall fundraiser information
 - Other relevant information that the school and PTA need to convey to parents.
- ✓ Host a PTA/PTSA table at Meet-the-teacher to:
 - Recruit memberships and volunteers
 - Sell school spirit wear (BE SURE TO GET THE DESIGN APPROVED BY YOUR PRINCIPAL!)
- ✓ Host your first back-to-school PTA/PTSA general membership meeting to get approval of any budget changes that have occurred over the summer and to approve the official budget for your term as president.

HAVE A GREAT YEAR!