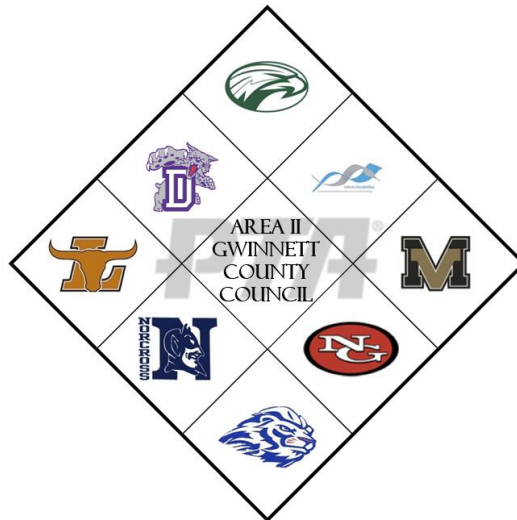


Area II Gwinnett County Council of PTAs



2015 – 2016 Local Unit PTA/PTSA Planning Calendar

**Area II Council Theme:
Grow ♦ Engage ♦ Inspire**

<http://www.area2gwinnettpta.org>

Mailing Address:

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INFORMATION CONTAINED IS FOR PTA/PTSA USE ONLY.
ANY USE OF INFORMATION FOR PERSONAL GAIN IS PROHIBITED.

General Reminders:

President:

- ◇ Review this planning guide and become familiar with the deadlines for submitting awards this year.
- ◇ Review the guidelines and requirements for earning awards this year (see the Georgia PTA Leadership Resources Guide and Area II Gwinnett County Council of PTAs Handbook).
- ◇ Read the local unit bylaws and make sure officers and board of directors have copies of current bylaws.
- ◇ Prepare a printed agenda for each meeting.
- ◇ **Remember to thank the volunteers often.**
- ◇ Conduct executive committee and board of directors, as well as general membership meetings in accordance with the local unit bylaws.
- ◇ Save all documentation from the local unit PTA events in a binder to use when writing reports. Reports are due in March. (examples of documentation include publicity material, news articles, photos, thank you notes, and event programs, program goal outlines/plans/outcomes).
- ◇ Pass on information received from Council, State, and National PTA to your executive committee and committee chairpersons.
- ◇ Check email often for updates and information from Area II Council and Georgia PTA.
- ◇ Bookmark websites for Area II Gwinnett County Council of PTAs, Georgia PTA, and National PTA. Check these websites often for important dates and information:

Area II Gwinnett County Council of PTAs: **www.area2gwinnettpta.org**

Georgia PTA: **www.georgiapta.org**

National PTA: **www.pta.org**

Secretary:

- ◇ Prepare Minutes for each meeting – if it's not in the Minutes, it did NOT happen. Business conducted must be documented in the Minutes.
- ◇ Treasurer's reports and committee reports should be filed with Minutes.

Treasurer:

- ◇ Prepare a printed treasurer's report for each meeting and have a copy of the transaction details available for review, if requested.
- ◇ Make sure Check Request forms are submitted, signed, and approved before issuing any check(s).
- ◇ Remember, two signatures are required on all check(s).
- ◇ Do not employ debit or credit cards for payments.
- ◇ Consider adding 'swiping' capabilities for accepting membership dues or spirit wear payment.

Membership Chairperson:

- ◇ Membership card templates can be downloaded on the Area II website at: www.area2gwinnettpta.org. Go to the Committees tab and click on Membership. Or, visit www.georgiapta.org, click on the Leadership Resources tab and go to Your PTA Membership.

Everyone:

- ◇ Remember to take time for yourself and your family.
- ◇ Keep in mind the reason you are involved in PTA/PTSA – children!

JUNE/JULY

President:

- ◇ Plan to attend the Georgia PTA's Convention/Leadership Training (CLT) Conference. Make sure the officers and board are aware of this important training event. Register early to avoid late fees. Pick up membership cards.
- ◇ At CLT, look for meeting notice regarding Area II Council/District 12 breakout sessions.
- ◇ Work with secretary to complete the local unit's Area II Voting Delegates form. This form is due back to Area II Council by August 10, 2015. Send via email to: secretary@area2gwinnettpta.org.

Secretary:

- ◇ Make sure that all incoming officer information has been sent to Area II Council and Georgia PTA. Due date for this information **was** May 1st.
- ◇ Work with President(s) to complete the local unit's Area II Voting Delegates form. This form is due back to Area II Council by August 10, 2015. Send via email to: secretary@area2gwinnettpta.org.

Membership Chairperson:

- ◇ Now is the time to plan the membership campaign for the upcoming school year. Watch for publicity ideas and membership campaign information from National PTA or visit their website at: www.pta.org.
- ◇ Attend CLT and go to membership related workshops.

AUGUST**President:**

- ◇ Make sure the local unit Area II Council Voting Delegates form has been completed and submitted by August 10, 2015. Send via email to: secretary@area2gwinnettpta.org.
- ◇ Review the local unit bylaws – they are the “road map” for a successful year!
- ◇ Distribute material received at training sessions to officers and committee chairpersons.
- ◇ Coordinate with principal regarding upcoming school year and your PTA/PTSA's plans.
- ◇ Hold a planning meeting with the officers and board – present proposed budget for board approval.
- ◇ Plan the General PTA/PTSA Membership Meeting to approve your budget.
- ◇ Make sure the local unit is represented at the Area II Council General Meeting & Training on August 12, 2015.
- ◇ Submit incoming chairperson information to Georgia PTA at: www.georgiapta.org and also Area II Council at: secretary@area2gwinnettpta.org.
- ◇ Provide the committee chairpersons with the material needed to be successful and write Priority Reports.
- ◇ Watch for an opportunity to attend a Georgia PTA University.

Membership Chairperson:

- ◇ Membership drive is in full swing! The new membership awards, Visionary Pin and Pacesetter's Certificate, must be postmarked by to the Georgia PTA by the last business day in August. The Early Bird Certificate award must be postmarked by the last business day in August.

Treasurer:

- ◇ Read over all of the treasurer's material from Council, State, and National PTA.
- ◇ Make sure the financial review report of last year's books is in order for presentation at the first General PTA/PTSA Membership meeting. The Audit Report should also be presented to the general membership.
- ◇ Watch for an opportunity to attend a Georgia PTA University.
- ◇ Submit PTA dues transmittal form to the Georgia PTA.

Reflections Chairperson(s):

- ◇ The Area II Council Reflections Workshop is on August 14th at the Instructional Support Center (ISC) from 10:00 am – 12:30 pm.
- ◇ Completed Reflections Chairman Profile forms are due to Area II Reflections Chair by August 14th. Complete order form for Reflections Handbook and posters. Bring to Workshop or email completed forms to: reflections@area2gwinnettpta.org
- ◇ Email Area II Reflections Chair at: reflections@area2gwinnettpta.org to reserve a printed copy of the Reflections Handbook. Handbooks will be available for \$10 at the Reflections Workshop on August 14th.

SEPTEMBER

President:

- ◇ Thank the volunteers who have worked to make the start of the year a success!
- ◇ Remind treasurer to send in Area II Council Dues (\$250). Dues deadline date is September 30th.
- ◇ Remind treasurer to send audit packet to Georgia PTA by September 30th.
- ◇ Remind committee chairs to make contact with all persons who volunteered to assist with events.
- ◇ Attend the District 12 Fall Conference on September 26th from 11:00 am-2:00 pm – location TBD Area II school.

Treasurer:

- ◇ Ensure that Area II Council dues have been submitted by September 30 to Area II Council Treasurer.
- ◇ Submit PTA Dues Transmittal form to Georgia PTA for the Platinum Membership Award and the Early Bird Certificate by the last business day of September.
- ◇ Submit audit packet to Georgia PTA by the last business day in September.

Membership Chairperson:

- ◇ Continue the membership drive.
- ◇ Complete a roster of the PTA members and provide a copy to the secretary and president/co-presidents.
- ◇ Remember, the membership drive should continue for the entire school year, not just the first few months.
- ◇ Make sure the treasurer has submitted the PTA Dues Transmittal form to Georgia PTA for memberships collected this month and the Dues form for membership awards – Platinum Membership and Early Bird Certificate. Send forms to Georgia PTA, both must be postmarked by the last business day of September.

Legislative Chairperson:

- ◇ Plan to attend the Georgia PTA State Advocacy Conference on TBD.

Special Dates:

- ◇ September 12: District 12 Membership Carnival – location TBD

OCTOBER

President:

- ◇ Plan for the local unit's Red Ribbon Week activities.
- ◇ Plan something for male members this month. Try to recruit more male members.
- ◇ Plan to attend the College Fair for Students with Disabilities on October 24th at the ISC.

Treasurer:

- ◇ Membership awards are due this month for the Oak Tree and Partnership Awards. Submit the Dues Transmittal for these awards by the last business day in October.

Membership Chairperson:

- ◇ Try to recruit more male members this month. Plan a special drive for male members.
- ◇ Remember to work with the treasurer to send in the next membership installment by the last business day in October.
- ◇ Ensure the Dues Transmittal for Oak Tree and Partnership Membership Awards are postmarked by the last business day in October.

Reflections Chairperson:

- ◇ Reflections entries are due to Area II Council October 16th at TBD from 9:00am – 12:00 pm.
- ◇ Plan how the local unit will recognize and reward students who participated in the local unit Reflections program.

Special Dates:

- ◇ October 19 – 23: National School Bus Safety Week
- ◇ October 21: Bus Driver Appreciation Day
- ◇ October 24: College Fair for Students with Disabilities at the ISC

NOVEMBER | DECEMBER**President:**

- ◇ Watch for an opportunity to attend a Georgia PTA University.
- ◇ Begin reviewing information in the Council and State handbooks regarding report writing.
- ◇ Remind treasurer to file Form 990 with the IRS by November 15 depending on fiscal year end.
- ◇ Remind Reflections Chairperson and encourage the PTA/PTSA board to attend the Area II Council Reflections Exhibit at TBD on November 8 from 10:00 am – 3:00 pm

Treasurer:

- ◇ Make sure that Form 990 has been filed with the IRS by November 15 depending on fiscal year.
- ◇ Submit PTA Dues Transmittal form to the Georgia PTA for additional memberships collected and submit the Silver Membership Certificate by the last business day in November.

Legislative Chairperson

- ◇ Plan now and determine how to keep your membership informed about issues being presented during the upcoming Legislative Session.

Membership Chairperson:

- ◇ Continue the membership drive.
- ◇ Remember to work with the treasurer to send in the next membership installment by the last business day in November for any new memberships received. Then submit the Silver Membership Award form. Keep the membership roster current and give copies to the secretary and president(s).

Reflections Chairperson:

- ◇ Attend the Area II Council Reflections Exhibit on November 8 from 10:00am – 3:00pm at TBD
- ◇ You or a member of the local unit MUST be on site at 3:00pm to sign for and pick up local unit entries.
- ◇ Plan how to recognize and reward students who participated in the Area II Council Reflections program.

Special Dates:

- ◇ November 8: Area II Council Reflections Exhibit (TBD) 10:00 am – 3:00 pm
- ◇ November 16-20: American Education Week

JANUARY**President:**

- ◇ Prepare for the election of the Nominating Committee, which should be held at a General Membership meeting (follow the local unit bylaws)
- ◇ Encourage the PTA/PTSA and invite the principal to attend the Area II January General Meeting on January 20, 2015 from 6:00pm – 8:00pm at GCPS Instructional Support Center. Check out website for details at: www.area2gwinnettpta.org
- ◇ Review the Georgia PTA Priority Report guidelines.
- ◇ Evaluate the local unit's progress in reaching PTA goals.

Legislative Chairperson:

- ◇ Georgia General Assembly begins – remember to keep the membership informed of important activities.
- ◇ All resolutions are due January 2.

Treasurer:

- ◇ Submit PTA Dues Transmittal form to the Georgia PTA for additional memberships collected and submit the Silver Membership Certificate by the last business day in November.

Membership Chairperson:

- ◇ Continue the membership drive.
- ◇ Remember to work with the treasurer to send in the next membership installment by the last business day in November for any new memberships received. Then submit the Silver Membership Award form. Keep the membership roster current and give copies to the secretary and president(s).

Special Dates:

- ◇ January 20: Area II Council January General Meeting (GCPs Instructional Support Center) 6:00pm – 8:00pm

FEBRUARY**President:**

- ◇ Make plans to celebrate the 114th PTA Founder's Day in February
- ◇ Watch for an opportunity to attend a Georgia PTA University.
- ◇ Remind the treasurer to submit membership dues and the Bronze Membership Award form to Georgia PTA by the last business day in February.

Treasurer:

- ◇ Submit PTA Dues Transmittal form to Georgia PTA for additional memberships collected and the Bronze Membership Certificate by the last business day in February.

Membership Chairperson:

- ◇ Remember to work with the treasurer to send in the next membership installment and awards form by the last business day in February for any new memberships received – keep the membership roster current and give copies to the secretary and president(s).

Legislative Chairperson:

- ◇ Continue to monitor the legislative activities and plan to attend PTA Day at the Capital on TBD.

MARCH**President:**

- ◇ Plan the General Membership meeting to elect next year's officers according to the local unit bylaws.
- ◇ Local Unit Incorporation renewal due to Georgia PTA on March 1.
- ◇ Priority Reports are due to Georgia PTA on 2nd Friday of March. Also send copies to Area II Council and District 12 Director.
- ◇ PTA handbooks, newsletters, and "Model PTA Award" form all due to Georgia PTA by the 2nd Friday in March.
- ◇ 'Outstanding School Nurse' nomination due to Georgia PTA by the 2nd Friday in March.
- ◇ 'Outstanding Principal' nomination form due to Georgia PTA by the 2nd Friday in March.
- ◇ Application form for a Georgia PTA Scholarship is due to Georgia PTA by the 2nd Friday in March.
- ◇ 'Birney Butler Outstanding Educator' nomination form due to Georgia PTA by the 2nd Friday in March.
- ◇ 'Visionary Award' nomination form due to Georgia PTA by 2nd Friday in March.
- ◇ Area II Gwinnett County Council of PTAs 'Award of Distinction' form due by the 2nd Friday in March.
- ◇ Area II Gwinnett County Council of PTAs 'Outstanding Principal' nomination form due by the 2nd Friday in March.
- ◇ Dues transmittal form for membership needs to be submitted to Georgia PTA. This is the final opportunity to submit dues to Georgia PTA for the current year.

Membership Chairperson:

- ◇ Present a summary of membership activity to the Board. Submit final membership dues to Georgia PTA.

Nominating Committee:

- ◇ This committee should be in place according to your local unit bylaws and actively seek next year's PTA leadership. Remember all Nominating Committee discussions are confidential. Current president(s) do NOT serve on this committee. See Area II website for details regarding local unit Nominating Committee.

Special Dates:

- ◇ March 2: National Read Across America Day (Dr. Seuss's Birthday)
- ◇ March 7-11: Exceptional Children's Week

APRIL

President:

- ◇ Plan to attend the District's Area Board of Education meetings.
- ◇ Plan to attend the Area II Gwinnett County Council of PTAs Spring General Meeting/End-of-Years Awards Dinner on April 27 (Peachtree Ridge High School). Check our website for details at: www.area2gwinnettpta.org
- ◇ Remember to recognize and celebrate the local unit volunteers.
- ◇ Begin planning for Teacher Appreciation week May 2 - 6.
- ◇ Prepare for kindergarten round-up the first part of May.
- ◇ Begin final evaluation of this year's progress.
- ◇ Make plans to attend the National PTA Convention on June 30-July 3 in Orlando, FL.

Secretary:

- ◇ Make sure your committee chairpersons are finalizing their procedure books for next year.

Membership:

- ◇ Prepare for kindergarten round-up the first part of May. Dues collected during this event should be submitted with a note that the dues are for the upcoming school year. Start membership roster for following year.

Special Dates:

- ◇ April 4-8: Public School Volunteer Week
- ◇ April 11-15: National Library Week
- ◇ April 18-22: Administrative Professionals Week
- ◇ April 20: Earth Day
- ◇ April 27: Area II Council Spring General Meeting/End-of-Year Awards Dinner (Peachtree Ridge HS) 6:00pm – 8:00pm

MAY

Outgoing President:

- ◇ Attend Area II Gwinnet County Council of PTAs Local Unit PTA/PTSA Transition Training on May 4 (GCPS ISC) 9:30 am – 11:30 am.
- ◇ Submit the Incoming Officer Information sheet to Georgia PTA no later than May 1. Or, enter it online at: www.georgiapta.org.
- ◇ Make sure local unit officers for next year have been elected and installed according to local unit bylaws.
- ◇ Finalize committee evaluations and make written recommendations for next year.
- ◇ Be sure that all procedure books are up to date and given to each successor.
- ◇ Arrangements MUST be made to transfer bank authorization with the treasurer and new officers. Newly elected officers assume their duties following the last day of the current school year (follow your bylaws).
- ◇ Current Executive Officers and Board of Directors/Committee Chairs may NOT sign *any* contracts for next year or authorize *any* checks on behalf of the PTA/PTSA *after* the last day of the school year.

Incoming President:

- ◇ Attend Area II Gwinnett County Council of PTAs Local Unit PTA/PTSA Transition Training on May 4 (GCPS ISC) 9:30am – 11:30am.
- ◇ Review the local unit bylaws and survey members for ideas for PTA activities and priorities for the new year.
- ◇ Work with the Executive Officers to appoint the Board of Directors. Set goals and plan preliminary budget.
- ◇ Work with the principal to set up school/PTA calendar for the new school year.
- ◇ Prepare the Local Unit PTA/PTSA Handbook and Calendar of Events for the new school year. Make sure it's printed prior to your school registration day in August.
- ◇ Update the local unit PTA/PTSA website link with new information for the upcoming school year.
- ◇ Review the Communications Cover Sheet in the Georgia PTA Leadership Guide. This sheet outlines guidelines for PTA handbooks and newsletters.
- ◇ Plan to attend Georgia PTA Convention Leadership Training in July 2016. Ensure your officers and BOD attends.
- ◇ Plan your first executive Board Meeting as soon as possible after school ends to avoid busy summer schedules.

Outgoing Treasurer:

- ◇ Attend Area II Gwinnett County Council of PTAs Local Unit PTA/PTSA Transition Training on May 4 (GCPS ISC) 9:30 am – 11:30 am.
- ◇ Make final preparation of books for financial review committee and audit.
- ◇ Arrangements MUST be made to transfer bank authorization with the president and new officers. Newly elected officers assume their duties following the last day of the current school year (follow your bylaws).
- ◇ Outgoing Executive Officers and Board of Directors/Committee Chairs may NOT sign *any* contracts for next year or authorize *any* checks on behalf of the PTA/PTSA *after* the last day of your school year.

Outgoing Secretary:

- ◇ Attend Area II Gwinnett County Council of PTAs Local Unit PTA/PTSA Transition Training on May 4 (GCPS ISC) 9:30 am – 11:30 am.
- ◇ Make sure officer information sheets have been sent to Area II Council, District 12 and Georgia PTA. Submit information online at: www.georgiapta.org.
- ◇ Make sure binders with Meeting Minutes and bylaws are in order for the next year.
- ◇ Outgoing Executive Officers and Board of Directors/Committee Chairs may NOT sign *any* contracts for next year or authorize *any* checks on behalf of the PTA/PTSA *after* the last day of your school year.

Outgoing Officers and Board of Directors/Committee Chairpersons:

- ◇ Attend Area II Gwinnett County Council of PTAs Local Unit PTA/PTSA Transition Training on May 4 (GCPS ISC) 9:30 am – 11:30 am.
- ◇ Organize and complete procedure book for the successor(s).
- ◇ Outgoing Officers and Board of Directors/Committee Chairs may NOT sign *any* contracts for next year or authorize *any* checks on behalf of the PTA/PTSA *after* the last day of your school year.

Special Dates:

- ◇ May 2-6: Teacher Appreciation Week
- ◇ May 3: National Teacher Day
- ◇ May 4: National School Nurse Day
- ◇ May 4: Area II Local Unit PTA/PTSA Transition Training (GCPS Instructional Support Center) 9:30am – 11:30am.
Check the Area II website for details at: www.area2gwinnettpta.org
- ◇ May 4: District 12 Spring Conference