



PRESIDENT'S DUTIES CHECKLIST

Monthly Duties

- Prepare agenda and preside over the Board of Director and General Membership meetings.
- Review and distribute the Treasurer's report and minutes of the previous meeting for approval.
- Confirm that National and Louisiana PTA dues and membership lists are submitted to LAPTA.
- Check the Bylaws and Standing Rules for dates of upcoming required business.

Familiarize yourself with the following:

- Your PTA Bylaws and Standing Rules. Request a current approved copy from Bylaws@LouisianaPTA.org.
- Get a copy of Robert's Rules of Order, Newly Revised.
- Visit LouisianaPTA.org and go through all pages. Create an account at PTA.org for additional resources.

Get Organized and Begin Planning

- Call a meeting of newly elected officers within 30 days of election to approve the appointment of historian and parliamentarian (if one is indicated in your Bylaws) and to appoint standing committee chairs.
- Ensure Board members met with their predecessors to receive relevant information.
- Submit to LAPTA your name and contact information at LouisianaPTA.org/submit-office-data-1.
- Encourage Board members to attend LAPTA Training.
- Encourage Board members to subscribe to National and Louisiana PTA electronic publications.
- Assess needs and set goals and objectives with your Board and the principal.
- Have a meeting with your principal to set the calendar for the year and review PTA goals.
- Know your PTA's Federal Employer Identification Number (EIN).
- Arrange for a meeting at the bank to change signers on the PTA's account. Call bank for details.
- Set up "Presidential" folders on your computer or cloud storage for shared files and President's binder.
- Follow PTA social media.

June/July/August

- Attend the National PTA Convention in June if your budget allows. Grants are available.
- Attend LAPTA Leader Training in August.
- Obtain and change the passwords to the PTA's accounts.
- Schedule an introductory meeting with the principal.
- Request Bylaws on the new template from LAPTA and ensure that each Board member has a copy.
- Prepare an agenda for the first Board meeting.
- Review the LAPTA Records Retention Policy. Note any changes needed for adoption.
- Have the Board sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Verify the schedule of monthly Board meetings for the entire year. Consider varying the start times and days of the week to allow more members to attend.
- Review submission dates for insurance policy. Proof of insurance will be required in 2023-24.
- Renew Articles of Incorporation Annual Report with Louisiana Secretary of State at geauxbiz.com.
- Preside over the first General Membership meeting of the year.
- Form the Audit Committee who will work on the Annual Audit Report due by October 28, 2022.
- Communicate PTA goals for the year.
- Intentionally reach out to new families at your school.
- Consider a welcome back to school celebration for staff and families.
- Host a volunteer orientation.
- Create a Welcome Packet for all students. Include membership ask, calendar, PTA Programs, and more.
- Adopt the Annual Report and Audit Report if complete.
- Create or update the CheddarUp.com account for the year. Offer online membership dues submittal.
- Create the new year and budget on MoneyMinder.com (highly recommended).

September/October

- Preside over the first General Membership meeting of the year if not held in August.
- Approve the proposed budget at the first General Membership meeting.
- Renew insurance policy.
- Appoint a committee to review Bylaws and recommend revision or amendments if needed.
- Communicate PTA goals for the year.
- Complete the Active Affiliation Report for LAPTA at <https://form.jotform.com/221816998285068> which is due October 28, 2022.**
- Confirm your program for the next General Membership meeting.
- Touch base with each officer/chair about upcoming duties or events.
- Share the Local PTA Awards as published in the *LAPTA Toolkit: Awards, Grants, and Contests*.
- Conduct the fall membership enrollment campaign. Submit member dues at LouisianaPTA.org/membership.
- Conduct the National PTA Reflections program. See LouisianaPTA.org/reflections.

November/December

- IMPORTANT:** Confirm that the Treasurer electronically filed the appropriate IRS return by November 15.
- Check-in with officers and committee chairs.

January/February

- Celebrate National PTA Founders' Day (February 17, 1897).
- At a membership meeting, elect a Nominating Committee and alternates as prescribed in the Bylaws.
- Ensure that the first meeting of the nominating committee is scheduled and provide clear instructions and guidelines to the Nominating Committee.
- Amend your budget, as necessary.

March/April

- Publish slate of candidates, as determined by the nominating committee, according to Bylaws.
- Conduct election of new officers.
- Actively recruit volunteers to fill open committee chair positions for next year.
- Remind the newly elected President to call a meeting within 30 days to fill Board positions and conduct any other necessary business.
- Connect current PTA leaders and volunteers with those at the next PTA (middle school, high school).
- Check-in with officers and committee chairs.
- Contribute to the PTA Annual Report or coordinate with historian/Secretary.
- Consider a membership survey to review past activities and solicit suggestions for new activities.

May/June

- Present at the annual (last) meeting a preliminary Annual Report, which is a year-to-date summary report of the year's activities.
- Coordinate installation of new officers. Thank this year's PTA Board and school volunteers.
- Submit your new local officer contact information to LAPTA.
- Remind outgoing officers and committee chairs that their procedure binders and materials must be submitted within 15 days after the end of the term. Consider a transition meeting or event.
- Pass all information along to the newly elected President, including all passwords to all accounts.
- Coordinate with the newly elected President to change signers on the bank account.
- Complete the Inventory Accountability Form.
- Attend National PTA Convention.
- Pat yourself on the back for a job well done.
- Thank you for a job well done!