

YEAR-LONG CALENDAR AND TIME LINE

*Use this calendar and time line to plan your upcoming year
Utah PTA website calendar is updated regularly: utahpta.org*

NOTES ABOUT CALENDAR:

- ♦ If you choose to incorporate activities into your schedule, adjust dates to your local school calendar as needed.
- ♦ Utah PTA dates are subject to change. Notification will be made online and to regions for distribution.

New Officer Transition Timeline (March through June)

MARCH

- ♦ Election of officers.
- ♦ Transition period from your election until June 30 begins now.
- ♦ Convention workshop lists will be available on utahpta.org for you to start looking at training options for all your incoming board members. Check your budget to make sure you have adequate funds. Convention and trainings are legitimate expenses.

APRIL

- ♦ Enter the incoming board information in Givebacks. Leaders listed in Givebacks will receive newsletters and communications from Utah PTA.
- ♦ Obtain a copy of your local bylaws from utahpta.org/bylaws/search. Check the expiration date to see if they are current or if they need to be renewed. Bylaws are renewed every three years. (**Note:** For your PTA/PTSA to be eligible to participate in Reflections and other PTA programs, apply for Utah PTA Awards, and receive sales tax refunds, your bylaws need to be current.)
- ♦ Fill board positions other than those which are filled by election. Local bylaws (Article VII) will tell you the duties of elected officers. Local bylaws (Article X) will help with commissioners and special committees.
- ♦ Meet with your new board.
- ♦ Prepare your local PTA/PTSA directory with your new incoming board officers and chairs. Directory should include position, name, phone number, and email address. Contact information is used for PTA business only.
- ♦ Attend pre-convention orientation meeting (if offered) and select classes that you and your board will be attending at the annual Utah PTA Leadership Convention. Convention for your new board should have been budgeted for by the outgoing board.
- ♦ Conduct needs assessment and set goals for the coming year

MAY

- ♦ Meet with your principal and PTA incoming Executive Committee to start planning your calendar. Presidents are encouraged to develop a good working relationship with their principal. This is imperative to the success of your PTA. Remember, you preside over the PTA and the principal presides over the school. The president and principal work together for the welfare of students.
- ♦ Meet with the treasurer to begin the budgeting process. Do not assume office or sign any checks until July 1. The outgoing president is still president until June 30.
- ♦ Attend Utah PTA Leadership Convention. Take as many members of your board as possible. The better they are trained, the better your year will be. Travel together to convention, eat together, and get to know each other.
- ♦ Browse utahpta.org for new ideas and resources.
- ♦ Follow/join Utah PTA, region, and council social media. Utah PTA's Facebook groups are great places to ask questions and get ideas from other PTA leaders

JUNE

- ♦ In June, July, or August attend region training as scheduled.
- ♦ Meet individually with the members of your board to find out the vision they have for their position and year. Encourage them to have a committee under their leadership position.
- ♦ Pass outgoing board member procedure books to the incoming board members.
- ♦ Plan your membership goal.
- ♦ Remember PTAs raise money to exist—they don't exist to raise money. When you plan your budget, plan what you will be raising money for. Don't raise the money and then try to decide what to do with it.
- ♦ Transition your Givebacks account and other online PTA accounts.
- ♦ Request a Sales Tax Refund Request be filled out for July to June (entire school year) by the outgoing treasurer.
- ♦ Make sure an AFR (Annual Financial Reconciliation) is done before the incoming treasurer accepts the financial books.
- ♦ Work with your treasurer to change the names on your bank account signature cards, effective July 1.
- ♦ Prepare a thank you gift for your outgoing PTA president.
- ♦ June 30th – End of fiscal year.

Beginning of Fiscal Year - A Timeline for Presidents

July 1 - Congratulations! You are officially the local PTA president!

JULY

Dates to remember:

July 1 - Fiscal year begins/change over PTA checking account signers.

July 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Meet with your membership chair and plan your membership campaign. Remember: membership is not a fundraiser, it is joining your local PTA, Utah PTA, and National PTA. Article V, “Membership and Dues,” of your bylaws will tell you what your membership dues are: \$1.75 of your dues collected go to Utah PTA. \$2.25 go to National PTA. If in a council, your council dues amount is found in Article XI of your bylaws.
- ♦ Consider holding a leadership meeting to plan your year with all board members.
- ♦ Review previous year financial records with your treasurer and outgoing president. Ask them which IRS filing will be prepared. For the previous fiscal year, if gross receipts are normally more than \$50,000, “Form 990EZ” needs to be filed; otherwise, “Form 990N” is required. (If you receive anything from the IRS, do not ignore it. Call the Utah PTA treasurer for assistance.)
- ♦ If you use Givebacks, you will have digital membership cards available or obtain membership cards from your council or region. You will need to put your National PTA Unit ID number on each card. The ID number is found on the front page of your local bylaws. **Note:** *If you don't know what your total membership was last year, check with your council president, region director, or call the Utah PTA office.*
- ♦ If your school is year-round, kick off your school's membership campaign with your PTA board and staff in July. Have the budget approved and AFR report adopted at your first general membership meeting (Back-to-School Night). Be sure to publicize this event.
- ♦ Ask your principal if you can attend the first faculty meeting and encourage teachers and staff to join your PTA/PTSA. Express that the T in PTA stands for teachers. Provide teachers with information and dates for PTA activities.

AUGUST

Utah PTA Legislative Advocacy Committee (LAC) usually meets the fourth Wednesday of each month on Zoom. Open to all membership. Contact the Utah PTA Advocacy Vice President for more information.

Dates to Remember:

August 1 - Year end information submitted through Givebacks by treasurer:

- ♦ Year-End Financial Statement
 - ♦ Annual Financial Reconciliation report (AFR)
 - ♦ E-filed/Approved IRS Form 990
 - ♦ Sales Tax Refund Request submitted on utahpta.org by treasurer
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August 15 - Council review of Local Unit End-of-Year Documents:

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- ♦ Council submit to region via Givebacks approval
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August 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Plan your local Reflections program.
- ♦ At your first general membership meeting: present the prior year financial statement and AFR report for adoption, have your budget approved, introduce your PTA board, introduce your theme for the year, let the parents know what PTA accomplished last year, and discuss your plans for this year including your membership campaign (possibly on Back-to-School Night). Some PTAs also elect Nominating Committee.
- ♦ Start your membership drive and encourage volunteers to sign up.
- ♦ Prepare beginning of the year paperwork. That includes budget and minutes of meeting where budget was approved, signed “Ethics/Conflict of Interest” and “Basic Fiscal Management Procedures” forms and “Proof of Insurance.”

SEPTEMBER

Dates to Remember:

September 1 - Region review of Council/Local End-of-Year Documents::

- ♦ Region submit to Utah PTA via Givebacks approval
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September 25 - Membership money due to Utah PTA and council if applicable (submit 50% of the previous year’s membership by this date to qualify for the Early Bird membership award).

In General:

- ♦ Kick off local Reflections program.
- ♦ Other activities (Google for more information).
 - Patriots Day (National Day of Service and Remembrance – 9/11)
 - Green Ribbon Month (health and safety)
 - National Childhood Obesity Awareness
- National Hispanic Heritage Month
- Suicide Prevention Week
- World Suicide Prevention Day
- International Day of Peace (Global Day)
- Family Health and Fitness Day

OCTOBER

Dates to Remember:

October - Utah PTA Advocacy Conference.

October 1 - Beginning-of-Year Documents submitted through Givebacks:

- ♦ Updated PTA officer list
- ♦ Budget and minutes of meeting where budget was approved
- ♦ Signed “Ethics/Conflict of Interest” forms
- ♦ Signed “Basic Fiscal Management Procedures” form
- ♦ Proof of Insurance

October 1 - Budget must be approved by your general membership by this date (Article VII:5).

October 1 - “Utah PTA Resolutions Notifications of Intent” form due to Utah PTA. Form is found in the legislative section of this President Handbook.

October 15 - Council review of Local Unit Beginning-of-Year Documents

- ♦ Council submit to region via Givebacks approval

October - Military Family essay due to Utah PTA.

October 25 - Membership money due to Utah PTA and council if applicable (submit 75% of the previous year’s membership by the due date to qualify for the On Target membership award).

October - 2024-2025 National PTA Reflections Theme Search due - found on utahpta.org.

In General:

- ♦ Local Reflections program
- ♦ Other activities (Google for more information)
 - Bus Safety Month
 - Red Ribbon Week/Purple Ribbon Month (Drug and Violence Free)
 - Crime Prevention Month
 - National Book Month
 - National Bullying Prevention Month
 - Read for the Record
 - Mental Illness Awareness Week
- Walk to School Day
- National Book Month
- National Health Education Awareness Week
- National Teen Driver Safety Week
- LGBTQ History Month
- Mix It Up at Lunch Day
- Begin collecting information for Report #1, which is due November 1. (See Local PTA Reports at the end of this section for more information).

NOVEMBER

Dates to Remember:

November 1 - Local, council, and region PTA/PTSA Report #1 is due - submit on utahpta.org.

November 1 - Region review of Council/Local Beginning-of-Year Documents

- ♦ Region submit to Utah PTA via Givebacks approval

TBA Veteran’s Day Concert.

November 15 - Resolutions for consideration at Leadership Convention due to Utah PTA.

November 25 - Membership money due to Utah PTA and council if applicable (submit 100% +1 of the previous year’s membership by the due date to qualify for the Trailblazer membership award).

In General:

- ♦ Council Reflections program.
- ♦ Other activities (Google for more information).
 - National Military Month
 - Utah PTA Month of the Military Family
 - KUED Annual Reading Marathon Kickoff
 - National Family Literacy Day
 - National Family Week
 - Native American Heritage Month
- ♦ Prepare for December 1 deadline to qualify for Reflections and other Utah PTA programs. In order to qualify, PTAs must have: current bylaws, all membership dues collected remitted to Utah PTA, and all other good standing requirements met (Article IV:1).

DECEMBER

Dates to Remember:

December 1 - Remittance date for membership dues, bylaws renewals and good standing requirements to participate in Utah PTA programs.

December 25 - Membership money due to Utah PTA and council if applicable (submit 10% over the previous year's membership by the due date to qualify for the Beehive membership award).

In General:

- ♦ Region Reflections program.
- ♦ National Special Education Month.
- ♦ Check your bylaws for the date your Nominating Committee must be elected by. Most bylaws require Nominating Committee to be elected by December 31.

JANUARY

Legislative Action Committee (LAC) meets every week during the legislative session on Wednesdays on Zoom. The session starts the third or fourth week of January and continues for nine weeks through the first or second Thursday of March. Open to all PTA members. Contact the Utah PTA Advocacy Vice President for more information.

Dates to Remember:

January - Local PTA award applications due to council.

January - Reflections due from regions to Utah PTA- check utahpta.org for due dates.

January 21 - First day of legislative session.

January 25 - Membership money due to Utah PTA and council if applicable.

Nominations for Utah PTA board member positions due – see website for more information.

In General:

- ♦ Local Battle of the Bands event.
- ♦ Other activities (Google for more information).
 - Parents Empowered Month
- ♦ Begin collecting information for Report #2 which is due February 1.
- ♦ Legislative session begins. You can follow all bills and PTA resolutions and positions that support the bills Utah PTA is following on the Utah PTA website under the Advocacy tab. The Bill Sheet is updated weekly during the legislative session.
- ♦ Local and councils are required, by their bylaws, to report nominations to their board 30 days before an election is held. Elections should be held before the end of March.

FEBRUARY

Dates to Remember:

Utah PTA **Leadership Convention registration** begins

February 1 - Local, council, and region Report #2 due - submit on utahpta.org.

February 1 - PTA Awards due from council to region.

February 1 - Arts Education Grant Fund and Art Supply Grant Applications due.

PTSA Student Days at the Capitol - check utahpta.org for dates.

PTA Day at the Capitol - check utahpta.org for date.

February 17 - PTA Founders Day.

February 25 - Membership money due to Utah PTA and council (if applicable).

LEAP Award application- check utahpta.org for due date

Student Scholarship applications- check utahpta.org for due date

In General:

- ♦ Take Your Family to School Week.
 - ♦ Other activities (Google for more information).
 - National Dental Health Month
 - Black History Month
 - Teen Healthy Relationships Month
 - ♦ Nominating Committee report of nominees should be made 14 days prior to election meeting.
 - ♦ Election of local PTA officers must be held prior to March 31.
 - ♦ Convention information distributed to all board members.
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MARCH

Dates to Remember:

PTA Awards due from Region to Utah PTA- check utahpta.org for due date

Membership Awards due to Utah PTA- check utahpta.org for due date

Local Units Battle of Bands Winners due to Multi-Region Chair-check utahpta.org for due date.

Gold Star Award application due to Utah PTA-check utahpta.org for due date

March 7 - Legislative session ends.

March 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Locals and councils hold elections as designated by your bylaws.
- ♦ Multi-region Battle of the Bands.
- ♦ Other activities (Google for more information).
 - National Day of Honor (Military)
 - White Ribbon Month (Respect)
- ♦ Transition period begins (election until June 30).

APRIL

Dates to Remember:

Utah PTA Reflections Awards Evening (TBA).

Battle of the Bands Multi-region winners due to Utah PTA- check utahpta.org for dates

Utah PTA Battle of the Bands - check utahpta.org for dates.

April 25 - Membership money due to Utah PTA and council (if applicable).

In General:

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| <ul style="list-style-type: none">♦ Pre-convention orientation meetings held♦ Other activities (Google for more information).<ul style="list-style-type: none">▪ Every Kid Healthy Week▪ National Child Abuse Prevention Month▪ Distracted Driving Awareness Month▪ National Volunteer Month▪ Month of the Military Child▪ National Arab-American Heritage Month | <ul style="list-style-type: none">♦ Register incoming board for Utah PTA Leadership Convention.♦ Enter incoming board information in Givebacks. Leaders listed in Givebacks will receive newsletters and communications from Utah PTA.♦ Show incoming president how to download copy of bylaws from utahpta.org. |
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MAY

Dates to Remember:

May 1 - Resolutions for consideration at Fall Advocacy Conference due to Utah PTA. Include Utah PTA Resolutions Cover Sheet found in Legislative section of this President Handbook.

Annual Utah PTA Leadership Convention - Check utahpta.org for exact dates.

May 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Other activities (Google for more information).
 - National Teacher Appreciation Week
 - National Mental Health Month
 - Screen Free Week
 - National Military Appreciation Month
 - Armed Forces Week
 - Armed Forces Day
 - Asian-Pacific American Heritage Month
 - National Foster Care Month
- ♦ Begin wrapping up business for the end of the year.
- ♦ Help the incoming president with any questions.
- ♦ Have a transition luncheon, dinner, or meeting where outgoing leaders pass the procedure books and PTA resource materials to incoming PTA board members.

JUNE

Dates to Remember:

June 1 - Local, council, and region report #3 due.

June 25 - Membership money due to Utah PTA and council (if applicable).

June 30 - Utah PTA fiscal year ends; books must be closed. Begin preparation of End-of-Year Documents: Year-End Financial Statement, Annual Financial Reconciliation report (AFR), Approved IRS Form 990, Sales Tax Refund Request.

In General:

- ♦ Board transitions
- ♦ Books closed pending year end financial reconciliation
- ♦ Other activities (Google for more information).
 - National Flag Week
- ♦ Outgoing president and treasurer review previous year budget with incoming PTA president and treasurer. Also discuss preparation by outgoing officers of IRS “Form 990EZ” or “990N,” whichever is required. For previous fiscal year, if gross receipts are normally more than \$50,000, “Form 990EZ” needs to be filed; otherwise, “Form 990N” is required. The 990 cannot be filed until after July 1.
- ♦ Have treasurer fill out “Sales Tax Refund Request” form on utahpta.org by August 1.
- ♦ Have treasurer work with incoming PTA president to change bank account signatures effective by July 1.

- ♦ Have Executive Committee appoint an auditor or elect an AFR Committee and have the treasurer prepare the records for the AFR.
- ♦ No checks can be written after June 30 by outgoing treasurer.

BEGINNING OF THE FISCAL YEAR

JULY

Dates to Remember:

July 1 - The incoming PTA president and officers officially take office.

The outgoing president and treasurer are still responsible to complete End of Year Financial Reports.

In General:

- ♦ Prepare all End-of-Year Documents: Year-End Financial Statement, Annual Financial Reconciliation report (AFR), E-filed/Approved IRS Form 990, and Sales Tax Refund Request. When the AFR is complete, books can be turned over to new treasurer.
- ♦ Incoming treasurer should coordinate signatures to be changed at the bank.

AUGUST

August 1 - Deadline for AFR to be completed and report to be given to the incoming president and treasurer as well as all End-of-Year Documents submitted on Givebacks.
