



## Summer preparation = a good start to the new school year



### Welcome everyone to another great year in PTA!

Here are a few ideas to help you get a good start to the new school year this summer.

- **Be sure to invite the principal to any board planning meetings.** Hopefully you met with your principal before the summer break, but if not, be sure to include the principal as you plan the year.
- **Set a proposed calendar for the year,** after checking with the principal to avoid any conflict. If the meetings are on campus, many school districts require that a Facilities/Building Use Request is filed by the PTA.
- **Provide a PTA welcome letter and membership campaign materials** for the school's summer mailing or registration packet.
- **Fill any vacancies on the board. Check with your council or district on the process to send forward the names and contact information for any additional board members, or changes in contact information.** Make sure each of your board members knows how to contact their counterparts at council or district to get questions

answered.

- **Review the president's and officers' procedure books and the PTA bylaws with your board**, so that everyone is familiar with the job duties, responsibilities and timelines for each position.
- **Review the evaluations, summaries and feedback from last year's board.**
- **Brainstorm with your board to set some goals for the PTA's work.** If you haven't surveyed the community for their input, there is still time to survey them and ask about possible projects to undertake and topics they want to hear more about as part of association meeting presentations.
- **Discuss proposed program plans, fundraisers to fund/meet the needs of the programs and finalize a proposed budget to present to the membership** at the first association meeting of the year.
- **Be sure to have a year-end financial report and the summer audit ready for study and adoption by the association.** A treasurer's report covering the period since the last association meeting must also be presented.

Articles to download and share with your board:

[Responsibilities of Officers and Chairmen](#)

[Strategies for Success](#)

[Start Your Year Off Right](#)

[PTA Annual Checklist for Success](#)

[Goal Setting](#)

[Make the Most of Association Meetings](#)

[Sample PTA Agenda with Phrases to Use](#)

[California State PTA 2013 Service Mailing](#)

Please check the [archives](#) of this **Leadership Essentials** publication for other issues and topics that may be of interest.

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## **We greatly value the work you do, and we want your feedback.**

Please share your ideas and input with us in our annual PTA local leaders and members survey, so that we can continue to effectively advance PTA's mission on behalf of all children and families. Please respond by August 1. Click [here](#) to get started.

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