



# PA/PTA Year at a Glance

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## June

1. Prepare a tentative calendar for the upcoming year. PA/PTAs must hold at least 9 monthly general meetings per school year
2. Submit a tentative [budget](#) for approval by the General Membership (if not done in May)
3. Submit [PA/PTA proposed budget](#) to the principal
4. Suggested **June 15** deadline for PTA officer and SLT elections (if not done in May)\*
5. Meet with newly elected PTA officers and transfer of records to incoming executive board (CR A-660 states the transfer of records should occur the next practicable day following the election)
6. [Annual Financial Report](#) due to principal by **June 30th** (per CR A-660, the report must also be distributed to the membership)
7. Board Transition meeting (between outgoing and incoming officers in presence of school principal)
8. Issue end-of-year newsletter and update website\*

**Tip:** After the June [transfer of records](#) meeting (or whenever that meeting occurs), outgoing officers meet individually with their newly elected replacements to provide detailed information on their roles and responsibilities.\*

## July (official start of new term)

1. Review and amend the [bylaws](#) every 3 years or as needed
2. Assign [3 signatories](#) for PTA checking account (if not done in June). All checks must be signed by two officers.

\*not mandated by [CR-A660](#)

3. Meet with newly elected officers of the [executive board](#)
4. Choose [committee](#) chairs\*
5. Prepare tentative yearly calendar (if not done in June)\*
6. Develop a [communications](#) strategy for email correspondence to membership
7. Make sure your PTA [financial records](#) are in order (and in compliance with your bylaws requirements)
8. Incoming [executive board](#) meets with the school administration/principal

**Tip:** *Learn more about the process of [incorporation and/or non-profit \(501c3\) status](#) to see if it fits your PA/PTAs current needs.*

## August

1. Meet with officers
2. Meet with principal (obtain approval for all decisions made to date)
3. Begin planning September [activities](#)\*
4. Meet with parent coordinator, teachers and staff to discuss PTA tentative calendar and events\*
5. Meet with city and state elected officials (including Education Committees Chairs of the local Community Board)\*
6. Establish all [communication](#) channels. Prepare first newsletter for membership and update website\*

**Tip:** *PA/PTAs have the right to post meeting notices on the school website (and may request permission from the principal to post additional information).*

## September

1. First [Executive Board meeting](#):
  - Introduce new board members and share tentative calendar
  - Discuss yearly planning
  - Review [budget](#)
  - Introduce potential committee chairs and discuss committee responsibilities\*

\*not mandated by [CR-A660](#)

2. Issue welcome letter to membership\*
3. First General Membership meeting: ([CR A-660](#) requires at least 9 monthly General Membership meetings per school year)
  - Review and distribute budget
  - Distribute and approve June, July, August, and end of the year minutes, which include Treasurer's Reports
  - Explain the role of the [School Leadership Team](#) and canvas for nominees (if necessary)
  - Review School Safety Plan, Discipline Code and Attendance Plan by **Dec. 15**
  - Discuss bylaws (have copies to provide if requested)
  - Approve vendors used
  - Approve timing of General Membership meetings (day/evening)
  - Discuss yearly activities
  - Discuss Title I status. Title I schools can place a clause in their bylaws requiring a Title I report at each monthly meeting. This is something FLCs encourage both PA/PTAs and SLTs to do\*
  - Ask members to sign up for [committees](#) and as volunteers for any of the year's planned activities and events\*
  - Work with the administration for orientation activities, such as Curriculum Night or Meet the Teacher\*

**Tip:** Schools and principals can use Title III monies to provide [translation and interpretation services to PTAs](#).\*

## October

1. Meetings (General Membership & Executive Board meetings)
2. Issue newsletter and update website\*
3. File [Fundraising Activity Reports](#) for each fundraising event
4. All elections must be concluded by **Oct. 15**

\*not mandated by [CR-A660](#)

5. Propose a school improvement project for [Participatory Budgeting](#)\*

**Tip:** When it comes to [meeting attendance](#), set realistic goals, understand community needs, make meetings appealing and ensure that everyone feels welcome.\*

## November

1. Meetings
2. File [Fundraising Activity Reports](#) for each fundraising event
3. For PA/PTAs that are 501(c)(3) organizations, [file appropriate IRS 990 tax](#) form by November 15
4. If the PA/PTA pays individuals for services, collect personal information via W9 forms and request 1099-MISC forms from the IRS. See [PTAlink's Treasurer's Checklist](#)
5. Revisit the bylaws as questions arise
6. Issue newsletter and update website\*

**Reminder:** A PA/PTA's bylaws must establish a process for counting, securing and depositing funds it receives, and one for documenting all financial transactions.

## December

1. Meetings
2. Issue newsletter and update website\*
3. File [Fundraising Activity Reports](#) for each fundraising event
4. Advocate to your Community Education Council on building conditions for the School Construction Authority's Capital Plan Amendment\*
5. Holiday events\*

**Tip:** Cultivate [volunteers](#) year round. Some PA/PTAs hold a "Volunteer Fair" where parents learn about the PA/PTA's work at the school and opportunities to get involved.\*

\*not mandated by [CR-A660](#)

## January

1. Meetings
2. [Interim Financial Report](#) due to principal by **January 31<sup>st</sup>** (CR A-660 also requires that the report be distributed to the membership)
3. If the PA/PTA pays individuals for services, begin to fill out 1099-MISC forms and file with IRS before April tax deadline
4. If your PTA uses an accountant to file taxes, send them financial information from the previous fiscal year
5. [Advocate](#) to your city and state elected officials on school budgets\*
6. Check your bylaws about forming a nominating committee and upcoming officer elections
7. Issue newsletter and update website\*

**Tip:** Parent organizations can and will often take on [advocacy](#) projects after a parent or group of parents become invested in a particular issue and engage and organize the rest of the school community. Check out our [Parent Advocacy](#) page for common topics concerning PA/PTAs across NYC.\*

## February

1. Meetings
2. File [Fundraising Activity Reports](#) for each fundraising event
3. Form Nominating Committee (in accordance with your bylaws)
4. Issue newsletter and update website\*

**Tip:** [Committees](#) can cultivate valuable skills and future executive board members. Think about how your PA/PTA may benefit from forming particular committees to meet established goals. Have a fundraising goal? Perhaps form a fundraising committee.\*

\*not mandated by [CR-A660](#)

## March

1. Meetings
2. File [Fundraising Activity Reports](#) for each fundraising event
3. Solicit nominations for executive board officer positions
4. Issue newsletter and update website\*
5. Vote on [Participatory Budgeting Projects](#)\*

**Tip:** City and State Budget negotiations take center stage in February and March. Reach out to your [city council and state legislators](#) for opportunities to testify at education hearings.\*

## April

1. Meetings
2. File [Fundraising Activity Reports](#) for each fundraising event
3. **April 1** is the deadline to notify the Principal/Parent Coordinator of the election date (This must be at least 14 calendar days prior to election)
4. The school distributes election notifications to the school community 10 calendar days prior to election.
5. Nominations for officer positions
6. Issue newsletter and update website\*

**Tip:** Elections can be held either in-person or virtually, but NOT hybrid. Rectify any logistical/technical issues in advance by holding a mock [election](#). *This is especially encouraged if you are using new software for a [virtual election](#).*\*

## May

1. Meetings
2. Create proposed budget for next year (Executive Board or Budget Committee)
3. Submit tentative budget for next year to General Membership for approval (per CR A-660 must be submitted no later than the June General Meeting)

\*not mandated by [CR-A660](#)

4. Annual Elections (CR A-660 requires annual elections to be held by the last day of the school year)
5. SLT elections after PTA officer elections (per CR A-655, SLT elections must be held after PTA officer elections)
6. Submit election certification form to Principal and Superintendent within 5 days of election
7. Internal audit (CR A-660 recommends conducting an internal audit once a year, prior to the completion of the Annual Financial Report)\*
8. Issue newsletter and update website\*

**Tip:** The regulations recommend that PA/PTAs with over \$50,000 in revenue hire a CPA or person with professional expertise in accounting or business to conduct their internal [audits](#).\*

**PTA**link



\*not mandated by [CR-A660](#)