



PPC May Training

May 1, 2025



Summer Checklist

May

- Download, read, sign, and keep with your Form 990 paperwork [this Conflict of Interest form](#).
- Meet with your outgoing president/officers to collect materials, transfer distribution lists, share user names, passwords, etc. Review the year.
- Review your PTO bylaws and plan to update if necessary.
- Hold a transition meeting involving outgoing officers/chairs and incoming officers/chairs.
- Meet with your treasurer to have them get your name as a signatory.
- Schedule your yearly review of finances by an outside person.
- Meet with your principal to schedule regular meeting dates for the two of you, create a tentative schedule for your general PTO meetings and special events, and determine PTO hospitality duties for Back to School activities.
- Set a meeting date for your executive board toward the end of the summer.



Summer Checklist

June - July

- Meet with fundraising committee chairs regarding contracts, payments, prizes/incentives, Conflict of Interest Agreement, and sales tax changes (if any).
- Review monthly bank statements.
- Review the PPC leadership materials.
- Set goals for the upcoming year related to finances, fundraising, communication, participation/volunteers, teacher care, etc.
- Write your welcome letter for the August school newsletter and/or Back to School packet.
- Prepare committee folders/online resources.
- Update any PTO welcome materials for new parents and parents of kindergartners.



Summer Checklist

August

- Have a Welcome Back party for your new team: introduce new members, share goals, walk through expectations, share PTO contact info. and meeting dates, and have fun!
- Have your treasurer provide your annual financial information to the PPC, which will be used to complete the PPC Form 990 to the IRS. (see the Treasurer's Handbook for details.)
- Prepare for your first meeting of the school year.
- Work with your principal on communications protocols between the PTO, parents, and staff.
- Listen to the "buzz" as people prepare for the new year!

September

- Sign and turn in to the PPC the Conflict of Interest Statement.
- Have your treasurer pay your PTO's share of the tax preparer's bill.


Treasurer

- Prepare 2025-26 budget for review at last general meeting
- Prepare 2024-25 docs and submit to accountant
- End of fiscal year is June 30
- Transfer bank accounts to new presidents and/or treasurers
- Set up transition meeting

Secretary

- Upload all notes and agendas to your website
- Check bylaws are up to date
- Set up transition meeting

VIPS

- Thank all volunteers from last year
 - Make lists of committees, roles and responsibilities
 - Find possible board members from volunteers
 - Set up transition meeting
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Ways and Means

- Start planning next year's event calendar now!
- Review committees roles and responsibilities
- Find coordinators for all fundraisers at beginning of year
- Set up transition meeting

Communication

- Get new parents (kindergarten) on the communication list
- Plan summer updates
- Set up transition meeting

Technology

- Get membership toolkit or other directory transition ready
 - Update emails and logins - change passwords
 - Set up transition meeting
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Presidents

- Do all that stuff everyone else was supposed to do
- Set up principal meetings
- Fill all your roles and vote them in May if possible
- Make your calendar for next year
 - Include communications
- Set up meetings over the summer
- Read Robert's Rules of Order
- Check in with your team regularly