

Getting Started

GETTING STARTED – What do I do first?

Take a deep breath! Get a cup of coffee (or your favorite beverage) and read this guide.

Gather the materials listed here and meet this spring and summer to plan for the coming year. Take it one step at a time. The first step is most often the hardest.

- Talk with the outgoing president and officers about the PTA's status and seek their recommendations. Verify the existence of required documentation.
- Verify that the outgoing secretary has submitted a list of incoming officers to North Carolina PTA office upon election, but no later than **August 1**.
- Meet with the school principal to find areas of common interest and concern. Learn about the school's goals and share your objectives for PTA. Establish a good working relationship right from the start by opening a channel of communication.
- Approve the appointment of a parliamentarian, determine how planning will be conducted, identify priorities and set goals. Decide what committees you want to have in place for the coming year, e.g., Membership, Legislative, Parent Involvement, Health, *Reflections*.
- Identify and appoint committee chairpersons.
- Make opportunities available to officers and committee chairs to attend training and leadership development events offered by your council and state PTA. Stress the importance of attending Leadership Training events throughout the year.
- Thank the outgoing officers and explain how their continued service would be of help as you plan for the coming year.
- Make sure that an audit of your PTA's books will be properly conducted at the end of the outgoing officers' term and that IRS reports are filed when due. (Don't panic if you don't understand what this means yet.)
- Change the signers on the PTA's bank accounts.
- Call your council, region, or state PTA if you need support or assistance