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6401 Linda Vista Road, Annex A San Diego, CA. 92111-7319 (858) 268-8077 office@ninthdistrictpta.org

PTA Planning Tools

Planning your PTA year may start right after the new PTA executive board has been elected.

- President elect meets with the board elect to plan goals for the PTA year.
- President-elect appoints the budget committee to develop the budget based on proposed PTA programs for the upcoming year.
- Treasurer-elect chairs the budget committee.
- Board-elect adopts preliminary budget to be presented to the association for adoption at the first association meeting of the new fiscal year. Check your unit bylaws for the meeting month.
- President elect meets with the principal to plan the PTA calendar year and get approval for events on campus.
- Board elect meets for further planning.

Need assistance? Contact your council PTA, if in a council, or contact Ninth District PTA leadership. We're here to help! leadership@ninthdistrictpta.org

- [Sample Financial Calendar of Activities](#)
Once the board for the 2022/2023 term has been elected in March or April, planning for the term may begin! This calendar will help when planning your year.
- [Start Your Term Out Right!](#)
Make sure the [contact information](#) for your newly elected board has been entered in the online Officer/Board Member Contact system so that your council PTA, district PTA and state PTA know how to get in touch and share information.
 - [Starting a new PTA term in the summer](#)
 - [Checklist – Start your year off right!](#)
 - [Tasks for New PTA Officers & Standing Committee Chairs](#)
 - [Responsibilities of Officers](#)
 - [Toolkit](#)
 - [Forms](#)

[Planning and Organizing Your PTA Year](#)

- [Guide to Executive Leadership](#)
 - [Executive Board](#)
 - [Brainstorming](#)
 - [Goal Setting](#)
 - [Procedure Book](#)
 - [Records Retention and Destruction Policy](#)
 - [Responsibilities of Officers and Chairpersons](#)
 - [Recommended Officers and Chairpersons](#)
 - [Job Descriptions](#)
 - [Administrators Serving as Officers/Check signers](#)
- [Committee Development and Guidelines](#)
 - [Committee Member Selection](#)
 - [Committee Meetings](#)
 - [Chairperson Job Descriptions](#)
 - [Committee Report Form](#)
- [Delegating](#)
 - [Delegating and Goal Setting](#)
 - [Memo for group members](#)
 - [Time management strategies](#)
 - [Tips for success](#)
- [Meetings](#)
 - [Sample Agenda and Meeting Planner](#)

Resources from <https://capta.org/>



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Budgeting, Programs and Membership

- [Budgeting](#)
 - [Insurance Coverage and Services](#)
 - [English Insurance Guide](#)
 - [Spanish Insurance Guide](#)
 - [Standards for PTA Fundraising](#)
 - [Policies and Procedures](#)
- [Programs at Schools](#)
 - [National PTA Programs](#)
- [Develop an Action Plan](#)
 - [Creating an event](#)
 - [Tips to Help You Plan New Programs](#)
- [Building Membership and Marketing PTA](#)
 - [Membership Toolbox for PTA Leaders](#)
 - [Membership Theme Ideas](#)
 - [Membership Timeline](#)
 - [TOTEM – Electronic Membership System](#)
 - [National PTA Membership Resources](#)

Where do I find information?

- Unit bylaws
- [Toolkit](#)
 - The online Toolkit includes all of the information and chapters in an easy format for quick access. You can click on the drop-down menus to find key topics, and use the search tool or view the more detailed table of contents for each section to quickly find the information you are looking for.
- Roberts Rules of Order
- California State PTA website: <https://capta.org/>

The California State PTA website has a multitude of information. You can use the search bar on the top right to look for information.
- Contact your council PTA if in council.
- Contact Ninth District PTA: office@ninthdistrictpta.org 858-268-8077
 - [Website](#)
 - [Board of Directors email contact list](#)