OMG – Hacks for a Smooth Year

Dorothy Gardner Immediate Past President Missouri PTA

permit

Bonding

permit

Bonding

permit

Insurance

Bonding

permit

Worksite restrictions

Insurance

Bonding

permit

Worksite restrictions

Trades

Insurance

Bonding

permit

manpower

Worksite restrictions

Trades

Insurance

Bonding

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Specialized materials

Bonding

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Specialized materials

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setbacks

paperwork

permit

license

manpower

Worksite restrictions

Trades

scheduling

Professional services

Insurance

Specialized materials

STARBUCKS COFFE

Completion Date

Completion date is when the new officers take over

Analysis

- Need to do
- Want to do
- Resources
- Restrictions/limitations
- Collaborations
- Review past years – the good/bad/ugly

Need to do

- Membership drive/dues
- Officers submitted/elections
- EOY report
- Annual review
- Budget
- Bylaws
- Nominating committee
- Taxes

Need to do

Membership drive/dues

- Membership year begins July 1st
- Membership year ends June 30th
- Dues submitted monthly

Need to do

Officers submitted/elections

- Submission due 3/31
- Voted on by general membership
- Nominating committee must be elected

Need to do

EOY report

- Due to MOPTA 12/1
- Must be approved by general membership

Need to do

Annual review

- Performed after the books are closed
- Committee appointed by the board
- Due to MOPTA 12/1
- Must be approved by general membership

Need to do

Budget

- Must be voted on by general membership
- Books are closed unless a budget is in place

Need to do

Bylaws

- Must be reviewed every three years
- Changes must be voted on by the general membership
- A committee is required for review

Need to do

Nominating committee

- Must be elected by the general membership

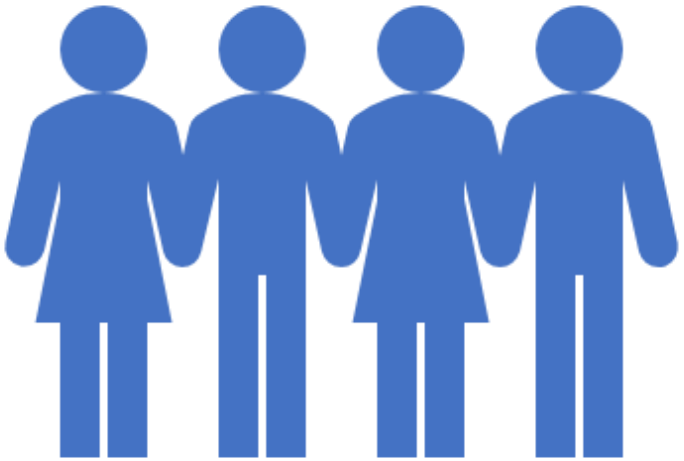
Need to do

Taxes

- Due to the IRS the 15th of the 5th month following the close of the fiscal year.
- Due to MOPTA 12/1

Maximize efficiency

- Back to school meeting - EOY report and annual review
- Winter meeting elect nominating committee
- Budget & elections held during spring meeting then turn in officers
- Bylaws plug them in at any of those meetings



Want to do

- Historical data
  - Does it serve a purpose
  - Does it align with mission
  - Current or outdated
  - Well attended
  - Do we have the resources to accomplish

Want to do

- Think big!!
  - Resources
  - Restrictions/ requirements
  - Duplication of offerings elsewhere
  - Is there an option for collaboration

Will do

- Develop timeline for all the final will does
- Plug them into the existing timeline of need to do
- Commitments from individuals to take on duties
- Reminder of duties outlines in bylaws

Communication

Is it efficient?

Board meetings

- Efficient
- Effective

Adjust

The unexpected will happen

Back up dates

Working by committee

Be a good Steward

- Train your successors
- Make resources easy to pass along
- Provide introductory opportunities with any collaborations
- Make sure the grass is green and healthy when you leave

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