

August 2025

- Executive board should meet & **review bylaws**, draft calendar & budget, set goals for the year.
- Attend MI PTA Summer Leadership Academy on 8/9 in Rochester
- Secure chairs for standing committees, as specified in bylaws: Membership, Reflections, Advocacy, DEI, YMAD and others. **Upload these chairpersons into Givebacks.**
- Middle School & High School – Begin membership drive in August. Promote using the Givebacks store. Have membership QR Code at schedule pick up for membership registration.

September

- Elementary - Begin membership drive.
- **At first meeting, have membership vote to approve audit, calendar, and budget.**
- **Upload approved budget in Givebacks.**
- Invite your LPTSAC liaison to your *general membership meetings*. (*Invite them monthly to receive more PEP points*).
- **Submit signed copy of the Bylaws Acknowledgement Form & signed Financial Best Practices Form to Council** (Pep@livoniaptsacouncil.org) and upload into your Files in Givebacks.
- **28** - Send membership dues to Michigan PTA.

October

- **Submit your unit's Policies & Procedures or Standing Rules to Council.** If you don't have them, consider creating them. Your Council liaison can help. **Make sure they are uploaded in your Files in Givebacks.**
- **Before Oct 28 - Pay one-time flat fee dues to Council (use provided form).** (\$100 for all units with the exception of Niji-Iro and LPS Early Childhood Center who pay \$75).
- **28** - Send membership dues to Michigan PTA

November

- **15 - IRS form 990 is due! File the electronic postcard.** Here is the QR Code: <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>
- **Upload 990-acceptance e-mail or copy of tax form in Givebacks.**
- **Must have insurance coverage by December 1st, upload to Givebacks.**
- **Check last bylaws submission. Must be reviewed, approved, and uploaded to Givebacks every 3 years.**
- **28** - Send membership dues to Michigan PTA.



December

- **December 1 is the deadline for Standards of Affiliation (SOA) with Michigan PTA.**
- **Send your Founder's Day nominees to Andrea Malenfant at** andrea.malenfant@livoniaptsacouncil.org
- **28** - Send membership dues to Michigan PTA.
- **Review your bylaws to see when your nominations committee needs to be established.**

Red í SOA /MIPTA Requirement

Blue í Council Requirement

Revised 05/2025

January

- ☐ Create a nominations committee, review election procedures in bylaws.
- ☐ Livonia PTSA Council Reflections celebration.
- ☐ Send your Founder's Day RSVPs to Andrea Malenfant at andrea.malenfant@livoniaptsacouncil.org
- ☐ **28** - Send membership dues to Michigan PTA.

February

- ☐ Founders Day is held to celebrate the establishment of PTA. There is a banquet with awards and other recognition. All units should plan on attending.
- ☐ **28** - Send membership dues to Michigan PTA.

March

- ☐ You may need to present your slate of nominees this month (check your bylaws).
- ☐ **28** - Send membership dues to Michigan PTA.

April

- ☐ You might have elections or need to present your slate of nominees this month.
- ☐ Livonia PTSA Council Youth Making a Difference Celebration.
- ☐ Attend Livonia PTSA Council meeting (election of officers).
- ☐ Attend MI PTA Convention
- ☐ **28** - Send membership dues to Michigan PTA.

May

- ☐ You might have elections this month.
- ☐ Attend Livonia PTSA Council Officer Training workshop.
- ☐ After elections, search for your membership chairperson for the next school year.
- ☐ **28** - Send membership dues to Michigan PTA.
- ☐ **Immediately following elections, upload all your new officers into Givebacks.**

June

- ☐ **28** - Send membership dues to Michigan PTA.
- ☐ Elect/Select your Audit Committee and have them sign up for the Audit Party.

July

- ☐ **1** - Close financial books from previous year.
- ☐ Plan membership drive for year. Middle Schools & High Schools send your membership flyer to the school to have it included in the beginning year packet.
- ☐ Attend Livonia PTSA Council Annual Audit Party.
- ☐ **ASAP – Upload completed Audit in Givebacks. If your unit completes their audit elsewhere, send a copy of the audit to Livonia PTSA Council AND upload in Givebacks.**

For all Items stating "Upload to Givebacks"

Log into Givebacks> Compliance Manager>Enter Compliance Submissions