President’s Everything You Need to Know

Workshop Overview
My Life as a PTA President

- The Power of PTA
  - Mission, resources, policies, bylaws
- PTA President – Key Roles
- PTA Planning – Getting Started
- Managing Your PTA – How To’s

The Power of PTA

Mission Statement

The mission of the California State PTA is to positively impact the lives of all children and families.

Adopted August 2013
California State PTA Board of Managers
The Power of PTA

Human Resources – 5 PTA Branches:
- Unit | Council | District
- California State PTA | National PTA

You never walk alone:
- Training, Support, Representation

National <-> State <-> District <-> Council
Unit - In Council
Unit - Out of Council

The Power of PTA

More Resources:
- California State PTA – www.capta.org
  - Toolkit | Service Mailing | E-news
  - Legislation Alerts | Convention
  - Convention | Scholarships/Grants
- National PTA – www.pta.org
  - Online Guides | E-learning Workshops
  - Blogs | Webinars | Programs

The Power of PTA

PTA Basic Policies
- Noncommercial
- Nonsectarian
- Nonpartisan

What do these 3 policies mean?
PTA Bylaws – Your GPS
What is in them?

Bylaws tell you about …

Association Name ID numbers
Boards + Elections
Meetings
Membership
Committees
Policies Actions Procedures

Questions?
What do PTA Presidents do?

PTA President – 3 Key Roles

Communicator
- Link families, school & community together
- Coordinate work of officers/chairmen
- Run meetings, prepare agenda
- Approve all materials (with principal)

Facilitator – Financial Procedures
- Sign payment authorizations & contracts
- Sign checks - Authorized check signer
- Ensure reports done & sent to council/district
  - Budgets, Audits, Annual Financial Reports
PTA President – 3 Key Roles

**Collaborator**
- Official contact
- Meet with principal regularly
- Attend council/district meetings

**Other assigned duties**
- Appoint Parliamentarian, Chairmen, Committees
- Submit Annual Report – Volunteer Hours

Leadership Qualities

- Be Available
- Show Respect
- Be Confident
- Have Knowledge
- Be Supportive
- Listen Well
- Show Concern
- Be Flexible
- Be Sensitive
- Have Patience

Questions?
PTA Planning 5 Steps

- Board Orientation
- Goals Programs “The What”
- Membership “The Who”
- Budget “The How”
- Family Engagement Fundraising “The Do”

PTA Planning – Tips

- Board Orientation
  - Ground Rules
  - Goals
  - Bylaws
  - Insurance Guide
  - Procedure books

- Goals Programs ‘The What’
  - Community Needs
  - PTA Calendar
  - Timelines

- Budget ‘The How’
  - Board submits items
  - Income = Expenses
  - Preliminary Budget

Membership ‘The Who’

- Membership Goals
- Year-long Campaign
- Develop Plan

Family Engagement Fundraising ‘The Do’

- Funds needed for activities
- 3-to-1 Rule
- Student Involvement

First Association Meeting

- To approve:
  > Programs
  > Budget
  > Membership Plan
  > Fundraising Plan

2018 California State PTA Convention
A07 B06 C09 D05 President’s Everything
You Need to Know
Managing Your PTA

How to Work Smarter

• Ground Rules
• Goal Setting
• Communication
  – Conflict Management
• Team Building

Managing Your PTA

Team Building

• Empower + mentor for today and tomorrow
• Recognize + appreciate different work styles
• Delegate early + often
• Thank + give a shout out to volunteers
• Be the Brand + Enjoy!

Did you know … You are not the Team?

Managing Your PTA

Communication Matters

• Regular | Meaningful | Two-Way
  – Keep everyone in the loop
• Remember to ‘Walk the Talk’
• Conflict Management – 3 R’s
  – Recognize | Referee | Resolve
Questions?

PTA Meetings

Executive Board Meetings
Committee Meetings
Association Meetings

PTA Meetings – How To’s

Before The Meeting
- Facility use permit
- Advertise
- Review minutes
- Prepare agenda
  - Contact those who need to report
What is on an Executive Board Meeting Agenda?

ABC PTA
1234 Sunshine Way, Rainbow, CA 56789
Executive Board Meeting – October 18, 2015 (4pm-5pm)

Call to Order
• Attendance
• Approval of Minutes
• Reports
  Financial | President | Principal | Teacher Rep. |
  Officers | Committee Chairmen
• Unfinished Business
• New Business
• Announcements
Adjourn

Quick Tip
Board meetings are where the decisions are debated and agreed upon. Association meetings are for reporting these decisions to the parents.

To Do List
• Run & Manage Your PTA
  – Pay bills
  – Create committees
  – Fill vacancies
• Communicate & Collaborate
  – Participate in meetings
  – Present reports to board & association
Executive Board – Working Together

To Do List

- Protect Your PTA’s Assets
  - Review & understand financial reports
  - Use best practices to handle funds

Fiduciary Responsibility
Shared responsibility of all board members as stewards of PTA assets.

Association Meetings

Call to Order

- Pledge of Allegiance
- Approval of Minutes
- Financial Reports
- President’s Report
- Officers’ Reports
- New Business
- Announcements

Adjourn

Sample Agenda
Association Meeting

PTA Meetings – How Tos

At The Meeting

- Start & end on time
- Follow agreed ground rules
- Stay on agenda
  - Use parliamentary procedure
  - Use ‘Issue Bin’

After The Meeting

- Delegate + follow up on Action Items
- Distribute minutes promptly
Questions?

Look Closer..Finance

Executive Board – Working Together

Handling Funds – How To

- Money counted by 2 people
  - 1 is a PTA officer or chairman
- Deposit funds immediately
  - Never deposit in personal or school account
- Payment authorizations
  - Signed by president & secretary
  - Never sign blank checks

Bank Statements
Assign non-check signer to review
PTA ‘In-Good-Standing’

- Dues – Forwarded monthly
- Insurance Premium – Oct/Nov time frame
- Audits – Done 2X/year
- Tax Returns – Filed annually
  - State & Federal
  - RRF-1 filed with CA Attorney General’s Office

Learn More – www.capta.org

Financial Mismanagement

- How To Handle
  - Report any suspected mismanagement to PTA District ASAP

Financial ‘Red Flags’

- Officer/chairman
  - Stops taking calls, coming to meetings
  - No treasurer’s report for meetings
- Check handling process skipped
  - Only 1 signature on checks
  - Checks issued but not approved
- Revenue less than chairman’s counts
Questions?

Working With Administrators

**Principals like PTA Presidents who**
- Plan with the principal
- Keep channels of communication defined and operating
- Respond to requests for help
- Respect the areas of responsibility
- Foster good home-school relationships
- Understand the school’s policies and procedures
- Show thoughtfulness and pre-planning in the use of school facilities
- Consider school schedule when planning PTA activities
- Always include principal or representative in meetings
- Support PTA legislative positions

Working With Administrators

**PTA Presidents like Principals who**
- Believe in and support PTA
- Attend PTA meetings, including executive board meetings
- Cooperate with the PTA in use of school facilities
- Make the PTA feel welcome and a part of the school
- Help PTA and school work toward mutual goals
- Keep PTA informed on school programs, problems and needs
- Help with program planning and cooperate in money raising projects
- Encourage teachers to join the PTA, help with program planning, and participate in the activities
- Encourage teachers to stress the importance of taking PTA notices home
Questions?