California State PTA
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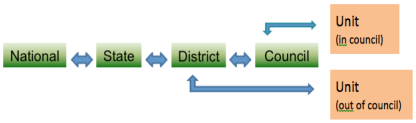
Council Leadership

2019 California State PTA Convention

What we will cover…

- Roles and Responsibilities of council PTA leaders
- The council's function in maintaining the strength of the organization
- Share some real life experiences of council officers

PTA Structure
Council Leadership



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What do Councils do?

- Coordinate efforts of units
- Facilitate a common vision and goal
- Meet regularly with units
- Provide training for units
- Share information from other levels of PTA
- Model good leadership skills
- Build relationships

Coordinate Efforts

- Facilitate development of common vision
- Survey units for common needs/concerns
- Invite speakers to address common needs/concerns
- Provide leadership and organizational support
- Act as spokesperson for units

Provide Training

- Attend trainings provided by district and state PTA
- Plan and provide training to units
  - At each meeting
  - On training days
- Model good leadership skills
- Use training material from California State PTA (LDP's)

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Share Information

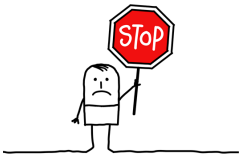
- Attend district PTA meetings
- Distribute information to units
- Solicit info/concerns and report to district PTA
- Timely
- Discuss at council meetings
- Communicate with unit officers on a regular basis

Develop and Strengthen Leadership

- Strong communication
- Ongoing training
- Visit unit meetings regularly
  - Offer Support
  - Build Rapport
- Nurture relationships
- Encourage unit officers to serve on council committees
- Coach potential leaders
- Be a good example
- Expect leaders to move on to council
- Recruit new board members
- Orient new board members
- Evaluate the needs of the board

Councils Do Not …

- Dictate
- Legislate
- Duplicate
- Compete
- Assess



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Promise

I will not do this all by myself.

Fiduciary Duty

- All PTA board members have a legal fiduciary duty.
  - Protect the assets of the organization
- Governance and guidance
  - Bylaws
  - Publications
  - Training

Responsibilities

- Contact Information
- Schedule due dates
- Remit promptly
- Collect and review

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Information to Collect/Review

- Rosters
- Membership remittances by month
- Financial reports
- Insurance premium payments
- Workers comp forms and surcharge
- Tax Information – 990 and 199
- RRF-1 Charitable Trust
- Audits – twice annually
- Bylaws
- NGS = Not in Good Standing

Best Practices Checklist

- Council as an Example of Best Practices for PTA
  - Meetings
  - Information and resource sharing
  - Board structure and management
  - Leadership development
- How to Work with Units
- Healthy PTA
- Signs of Problems in Associations
- Handling at risk associations

How to Work with Units

- Visit each unit
- Assign a Mentor to each unit
- Help units remain in good standing
- Communicate
- Be available to help
- Assist when requested or when issues arise
- Celebrate their successes

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Healthy PTA

- Membership campaigns
- Transparent
- Bylaws up-to-date
- Financial procedures
- Developing leaders

Signs of Problems in Associations

- No compliance
- Vacant positions
- No new leaders
- Small number of members
- Incorrect financial reports
- Tax filings missing

Handling At Risk Associations

- Reintroduce PTA
- Support plan
- Mentors
- PTA basic training
- Update bylaws

What else???

Working with Units having issues
- Conflict Resolution
- District is a Resource

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Communications Pledge

- Tell me
- Tell me first
- Tell me in language I can understand
- Tell me as soon as it is a concern
- Tell me privately
- Give me time to think before we conclude

Working with Superintendents and School Boards

- Meet regularly with superintendent(s)
- Share PTA information with school district personnel
- Attend school board meetings
  - Report on PTA activities
  - Provide information to units
- Invite local superintendent(s) to meetings
- Provide PTA representatives for school district committees

Membership

- Membership is everyone's business. Assist your units!
- Everyone is welcome to join! Ask everyone!
- Hold membership contests at the council level.
- Enhance PTA public image. As a board member model appropriate behavior in person, in writing, in email, and in all social media.

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Projects and Programs

- Collaborate on special events and programs
- Include a short training segment at each meeting
- Spearhead community projects

- Ideas
  - Study groups
  - Outreach
  - School and Community Relations
  - Workshops
  - Projects
  - Health and Welfare
  - Safety
  - Education
    - LCFF/LCAP

Advocacy

- Within council as well as at the unit level
- Speaking out on behalf of all children and youth
- Get to know the school board
  - Coordinate a schedule so at least one or two people attend each meeting
  - Speak at the school board meeting *
- Be prepared to "take action" *
- Submit letters to the editor *

* with PTA approval

Thank You!