

PTA President and Leader Training

Workshop Overview
My Life as a PTA Leader

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

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The Power of PTA

Human Resources – 5 PTA Branches:

- Unit | Council | District
- California State PTA | National PTA

PTA Safety Net:

- Training, Support, Representation

National ↔ State ↔ District ↔ Council
 ↗ Unit - In Council
 ↖ Unit - Out of Council

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The Power of PTA


PTA Basic Policies

- Noncommercial
- Nonsectarian
- Nonpartisan

What do these 3 policies mean?

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The Power of PTA



**PTA Bylaws –
Your GPS
What is in them?**

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The Power of PTA

Bylaws tell you about ...

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

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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)




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PTA President – 3 Key Roles

Facilitator – Financial Procedures

- Sign payment authorizations & contracts
- Sign checks - Authorized check signer
- Ensure reports done & sent to council/district
 - Budgets, Audits, Annual Financial Reports



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PTA President – 3 Key Roles

Representative

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



Other assigned duties

- Appoint Parliamentarian, Chairmen, Committees
- Submit Annual Report – Volunteer Hours

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Questions?



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Executive Board – Working Together



What is on a Board Meeting Agenda?

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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 detailed work happens not at Association meetings

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Executive Board – Working Together

To Do List

- Run & Manage Your PTA
 - Pay bills
 - Create committees
 - Fill vacancies
- Communicate & Collaborate
 - Participate in meetings
 - Present reports to board & association



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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.

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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

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Executive Board – Working Together

PTA ‘In-Good-Standing’

- ✓ Dues – Forwarded monthly
- ✓ Insurance Premium – Due in Dec.
- ✓ Audits – Done 2X/year
- ✓ Tax Returns – Filed annually
 - State & Federal
 - RRF-1 filed with CA Attorney General’s Office

Learn More – www.capta.org


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Executive Board – Working Together

Financial Mismanagement

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

Early Warning Signs
What ‘red flags’ might you see?



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Executive Board – Working Together

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

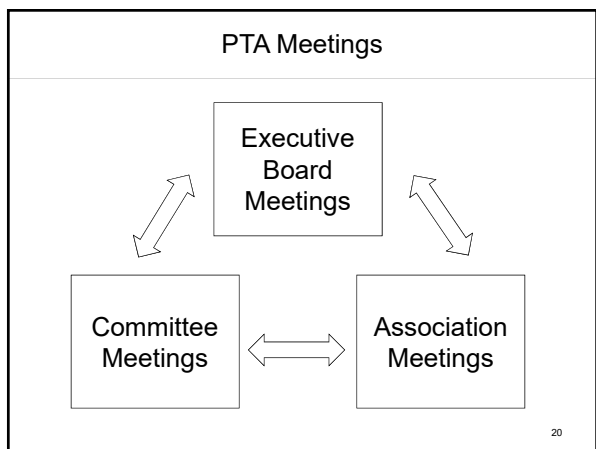


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Questions?




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PTA Meetings – How Tos

Before The Meeting

- Facility use permit
- Advertise
- Review minutes
- Prepare agenda
 - Contact those who need to report



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Association Meetings

- Call to Order
- Pledge of Allegiance
- Approval of Minutes
- Financial Reports
- President's Report
- Officers' Reports
- New Business
- Announcements
- Adjourn

Sample Agenda

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PTA Meetings – How Tos

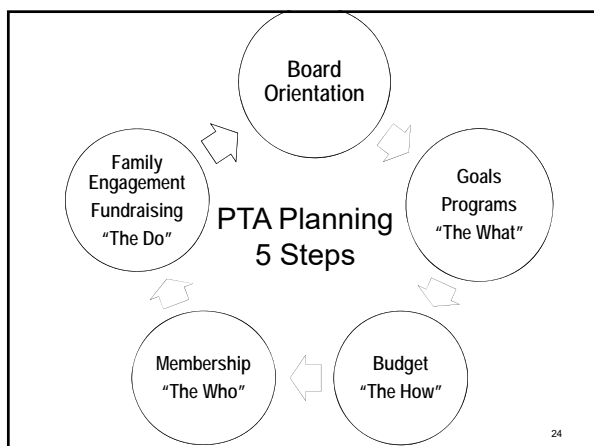
At The Meeting

- 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

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PTA Planning – Tips

Board Orientation	Goals Programs ‘The What’	Budget ‘The How’
Ground Rules Goals	Community Needs	Board submits items
Bylaws Insurance Guide	PTA Calendar	Income = Expenses
Procedure books	Timelines	Preliminary Budget

Membership ‘The Who’	Family Engagement Fundraising ‘The Do’	First Association Meeting
Membership Goals	Funds needed for activities	To approve: >Programs
Year-long Campaign	3-to-1 Rule	>Budget
Develop Plan	Student Involvement	>Membership Plan
		>Fundraising Plan

Questions?




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Managing Your PTA

How to Work Smarter

- Ground Rules
- Goal Setting
- Communication
 - Conflict Management
- Team Building



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Managing Your PTA

Goal Setting – Use SMART Goals

➤ Why is it important to set goals?


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A	<input type="text" value="• Attainable"/>
R	<input type="text" value="• Relevant"/>
T	<input type="text" value="• Time Based"/>

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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



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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?

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Questions?



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