President Part 2

Workshop Overview

- PTA Basics - Mission, resources, policies, bylaws (covered in PTA Basics and Finance for All workshops)
- PTA President – Key Roles or What Do Presidents Do? (covered in President, Part 1)
- PTA Planning – Getting Started (covered in President, Part 1)
- Managing Your PTA – How To’s
- Team Building and Working with Conflict (covered in workshop of same name)
President

- Oversees and coordinates the work of an executive board to run a PTA effectively
- Presides over PTA board and association meetings
- Serves as the official contact, communicator and representative of the PTA
- Designated as an authorized signer for PTA checks, contracts and authorization for payment
- Serves as ex officio member of all committees except for the nomination committee
- Works with other PTA leaders to connect families, school and community to support student success.
- Cannot be related by blood or marriage nor reside in the same household as Treasurer or Financial Secretary

Managing Your PTA - Meetings

PTA Operations for All Meetings

Committee, Executive, and Association/ General Meetings

- Must keep minutes
- Attendees - quorum
- Motions
- Budget information and expenses
- Minutes approved at next meeting and signed by secretary
Effective Meetings

Before the Meeting
- Facility Use Permit
- Advertise
- Review minutes
- Prepare agenda
  - Contact those who need to report

Effective Meetings

During the Meeting
- Start on time
- Ground rules
- Parliamentary procedure
- Issue bin/Parking lot
- End on time

Effective Meetings

After the Meeting
- Delegate & follow up on Action Items
- Distribute minutes promptly
Committee Meetings

- Open to President (ex-officio), Chair, Committee Members
- Meet as necessary
- Quorum - majority of committee members
- Lengthy Discussions
  - Preliminary Work
  - Hammer out the details
- Recommend actions to the Executive Board - including handling of assigned dates, recommended action to the association and authorization for expenses.

Types of Committees

- Fundraising, Ways and Means
- Programs, Events, Family Engagement
- Membership
- Hospitality
- Parent Liaison, Room Parent Coordinator
- Awards, Scholarship, Student Recognition
- Student Representative
- Communications (instead of Corresponding Secretary)

Executive Meetings

- Open to Officers, Standing Committee Chair, Teacher Representatives, Principal (Must be members of the association.)
- Guest are granted a courtesy seat by the President to share information. They do not vote. Should leave meeting after their report.
- Meet monthly
- Fill vacancy - appointment of empty positions after elections.
- Appoint chairs
- Review budget - make recommendations
- Review audit - approve to move to general for adoption
- Review bylaws - beginning of the year
- Plan speakers or programs for General Meeting
Elected vs Appointed Positions

- Elected
- *President*, EVP, VP, *Secretary*, *Treasurer*, Financial Secretary, Historian
- Appointed by president, ratified by board
- Parliamentarian, Corresponding Secretary, Standing Committee Chairs
- Neither
  - Principal
  - Teacher Representative
  - Check Bylaws to determine
  - Auditor

* Required by Non-Profit Law and must be filled.

All are members of the executive board and have full voting privileges.

Executive Board – Working Together

What is on an Executive Board Meeting Agenda?

ABC PTA
Executive Board Meeting
October 15, 2020 (6:30-8:30 pm)
1234 Sunshine Way, Rainbow, CA 56789

Call to order
Attendance
Approval of Minutes
Financial Reports
Reports
- President
- Principal
- Teacher Rep
Officers
Committee Chair Reports
Unfinished business
New business
Announcements
Adjournment

Quick Tip: Board meetings are where the members are thanked and appreciated. Association meetings are for reporting news, updates to the parents.
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 the board & association

Executive Board – Working Together

**To Do List**

Protect Your PTA’s Assets
- Review & understand financial reports
- Pay attention to the numbers - membership and money
- Use best practices to handle funds

Detailed information in "PTA Basics and Finance for All"

Association/ General Meetings

- Open to all - PTA members and guests (only members vote)
- Meet as set in Standing Rules of Bylaws - Post Agenda 10 days in advance (President can call an emergency meeting - see bylaws)
- Approve Calendar - Programs & Fundraisers
- Financial - Approve Budget, Release Funds & Ratify Expenses
- Adopt Budget
- Adopt Bylaws and Standing Rules
- Selection of Nominating Committee - 2 months prior to election meeting
- Elections (see Toolkit on capta.org)
Association/General Meeting Agenda

• Call to Order - Be sure quorum is met
• Opening Ceremonies - can include pledge of allegiance
• Approval of Minutes - from prior meeting
• Financial Reports - including starting and ending balance
• Presentation of Bills - to be paid and checks ratified
• Audit Report [twice annually] - This report is adopted by association
• Executive Board Report - Meeting Summary with motions to adopt, recommendations for approval
• Committee Reports - If no motions, report is filed.
• New Business - Motion is needed on action item before discussion/vote
• Adjournment - no motion needed
• Program

Managing Your PTA

How to Work Smarter

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

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
Communications Pledge

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

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!

Manager of the Team Promise

I will
not do this
all by myself,
since I’m part of a TEAM!