Welcome PTA President

Welcome to PTA leadership! Thank you for volunteering your time to lead your PTA. Whether you are a president, officer, or board member, you are in a great position to help children and families succeed! We welcome you to the PTA family.

As a PTA leader, you will focus your community on the needs of your members and their children. Your leadership will motivate volunteers and persuade local decision makers. The president and board team will communicate and collaborate with teachers and administrators, community partners and associations, raise funds and awareness, provide much-needed programs for students and families, encourage reading and the arts, and much, much more. Because you are a part of PTA leadership, you become a part of the rich history of PTA, an association with more than 119 years of experience helping children succeed.

Because of you and your fellow PTA members, the children and schools of your community will be more successful.

Why lead a PTA?

- PTA is the number one voice for family engagement.
- Children succeed when families, schools and communities work together. PTA helps develop those relationships through resources, programs and advocacy.
- You are not alone. PTA is a network of trained and passionate volunteers just like you, ready to assist you when you need help.
- You are part of a powerful voice for all children, working with like-minded people around the country and the world to improve the education and well-being of our youth.
- You are supported by real people who will connect you to information about children and education you can use today.
- PTA makes a big difference by influencing the decisions of legislators and leaders of other organizations - and PTA works with families locally to ensure proper funding, leadership and instruction for all schools and school districts.
- You can be a role model to your children and your community!

This PTA President’s and Board Member’s Quick Reference Guide was created to help you effectively lead a board of directors who:

- Sustain and increase a diverse and inclusive membership
- Work collaboratively with school staff, community organizations and individuals who care about children, families and education
- Conduct programs that encourage all families to be involved in children's education
- Keep families and community informed about student achievement, as well as student health and well-being
- Organize actions to address student achievement, health and well-being
- Develop PTA unit leadership for the future
- Monitor and manage the business of the association
Thank you for all you do. We hope this PTA President’s and Board Member’s Quick Reference Guide will be a useful tool as you lead your PTA.

You and your PTA members have many tools from which to choose. Every person who joins a local PTA automatically becomes a member of both his or her state PTA and the National PTA and receives support from a national network of peers. Please take full advantage of all of National PTA’s resources. PTA is one association - local, state and national. Be sure to let your members know the value of their PTA membership.

**Leadership Development and Transition**

All PTA leaders should begin their terms with their final day in office in mind. This is especially true for PTA officers. Smooth transition ensures the work you do now is part of a series of PTA successes. Start planning now for your own smooth transition out of office. Few will remember the great things you do if your PTA falls apart at the end of your term. Start planning now to leave behind a legacy of success.

A successful transition has two components: leadership development and communication. Every member of the PTA board plays a vital role in both areas.

**Smooth transition through leadership development:**

Boards should assess the strengths and weaknesses of current board members, and consider a leadership development plan. Ensuring the future viability of the PTA is one of the board’s primary responsibilities.

Presidents plays an important role in leadership development by providing board members with opportunity to grow new skills. While a president cannot "crown" his or her successor, a president can do a lot to ensure there are many qualified candidates ready for consideration by the Nominating Committee.

**Presidents, consider providing opportunities for board members to become potential next presidents by:**

- Asking them to join you in a meeting with teachers, the principal or the superintendent.
- Assigning them to attend a meeting on your PTA’s behalf.
- Giving them an opportunity to take the lead on building a relationship with a new partner or sponsor.
- Encouraging them to attend state or council leadership conferences and trainings.
- Encouraging them to take National PTA e-learning courses to develop and reinforce skills.
- Including them as part of your PTA’s delegation to the state or National PTA convention.
- Nominating them to chair a special committee.

**Smooth Transition through Communication**
An incumbent/outgoing officer or board member should:

- Meet with incoming leadership. Discuss what worked and what did not. Help incoming leaders get to know the community, its people and its goals.
- Arrange meetings with contacts. Introduce the new leadership, especially new officers, to teachers, administrators, community partners and community leaders.
- Hand over the records and materials. PTA records and materials belong to the unit, not to any one individual. Also, make sure the incoming officers have the usernames and passwords, documents, account information, etc. that they need.
- Hand over the “board book.” Make sure the incoming officers and board members have the documents they need to get started, such as bylaws, policies, financial reports, 990s, and minutes, answer questions, calm nerves, and assure people that you are willing to help in the coming year.
- Introduce the new team to the membership. It is important that members see a smooth succession and know that the PTA and their children are in good hands. Encourage incoming leaders to attend PTA meetings. Encourage your members to welcome the new leaders.
- Update contact information with your state PTA. Make sure the new person receives any information needed to access the PTA Back-to-School Kit. Update your database, official records, website and social media.

Goal Planning

One major role of a board is to develop short- and long-term goals aligned with the PTA mission and create plans to achieve those goals. The local unit president plays a key role in ensuring planning occurs. A plan, including goals and objectives, for the year should be written, each board member should have a copy, and you might consider sharing it with school staff and the principal if you are a school-based unit. School-based unit leaders should also consult with school staff so that PTA and school are working in partnership to create and achieve goals.

The written plan of overall goals and specific objectives should be used by the finance committee in developing the budget. Planning also should include an evaluation mechanism for ongoing measurement of your PTA’s progress and successes.

Revisit your goals throughout the year and check to see if you have attained them, or what has changed. Plans, like budgets, are living documents. They need attention in order to thrive. Your PTA may need to make changes as the year progresses. The best plans are always in evaluation and adjustment so that goals can be achieved.
Goal Planning Step-by-Step

Determine the purpose of PTA in your community (remember to use the PTA mission as a guide. Be a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child).

Review past and current activities of the PTA. Did past activities meet the needs and goals of the association?

- List all available resources for the PTA; funding, membership, local assistance from other organizations and agencies, facilities, National PTA grants and awards, etc.
- Gather input from families, teachers and administrators on school and community needs through surveys and discussions. Assess the needs of your school community by communicating with the principal and teachers. Conduct a survey of all families to find out what they want and need, as well as who they are. If you are a community-based PTA, identify potential collaborators and conduct a survey of community needs. Invite all involved to join PTA. A sample needs assessment survey and scoring guide is available in the Additional Resources section of this guide.
- List the types of activities for consideration.
- Develop objectives for actions based on the results of your needs assessment. Prioritize ideas and select the two or three that best meet the board’s goals.
- Develop a calendar for activities and assign committee responsibilities.
- Propose your plan for meeting the objectives at a PTA meeting. Invite all school staff, families, and appropriate community members to attend.
- Vote on the adoption of the plan and incorporate your PTA’s goals into your annual calendar.
- Create a plan to raise funds to support your plan of work and achieve your goals.
- Evaluate the activities using measurable outcomes.
- Report your success to your PTA members and to your community.

An effective PTA:

- Conducts at least one program or project that provides an opportunity for families to be engaged in the school.
- Conducts at least one program or project that increases awareness among families about issues that affect student achievement or school success.
- Conducts at least one program or project to bring the school, families, and the community into closer relationship.
- Attends the state PTA convention or other state PTA-sponsored events.
- Sustains and increases its membership.
- If a school-based PTA, conducts at least one planning meeting with teachers and principal.

National PTA Back To School Kit