

Key Role – Local Unit Leader

- Works collaboratively to oversee unit business and run a PTA effectively
- Provides information, activities and resources to empower members and community stakeholders
- Focuses on connecting families, school and community to support student success

Getting Started

Preparation – Review files and materials from last term to know more your new position. Check your bylaws and standing rules to see what your duties are as a PTA officer/chair. Find out more about:

- PTA policies, best practices and resources
- California State PTA *Insurance Guide*

It's also worthwhile to talk to your predecessor about what past activities worked well and what needs to be tweaked to make your PTA even better.

How Tos

Local unit leaders work together to run a PTA well by:

Communicating:

- Update the board, members and community stakeholders on the plans and upcoming activities you're working on
- Share information from council, district, State and National PTA with members and community stakeholders

Collaborating:

- Attend board and association meetings and give reports to keep everyone in the loop
- Be a team player by meeting deadlines, doing your part and asking for help if you need it
- Ensure federal and state tax returns and filings are submitted by due dates

Cooperating:

- Stay connected with your council/district PTA for information, advice and support
- Send monthly and annual reports and information to council/district PTA as requested

Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book and files to pass on to a successor
- Work together as a team to improve the lives of all children and their families

Other Useful Information

Resources:

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Mailed annually to PTA presidents

Online Services:

- MyPTEZ-Officer Contact System and Document Retention System – To enter officer and board member information and generate useful reports
- MyPTEZ Accounting Software – To handle PTA accounting needs and generate financial reports
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- TOTEM – Electronic Membership System – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- PTA Leaders tab and more
- E-Learning Workshops

05/2025