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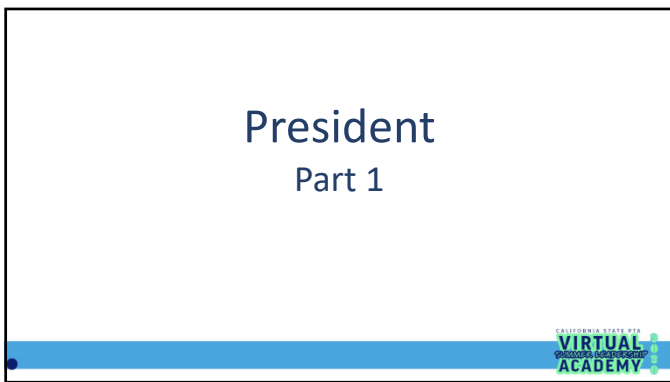
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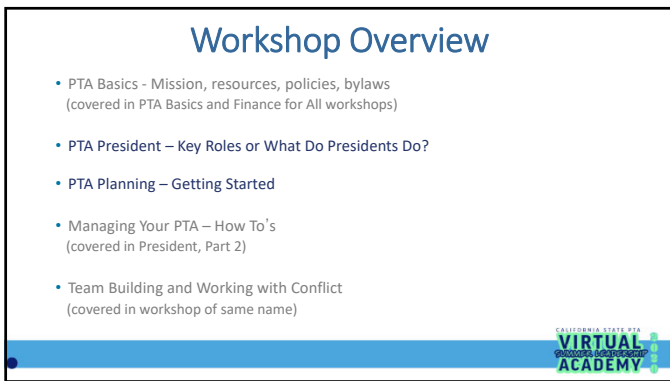
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## Workshop Overview

- PTA Basics - Mission, resources, policies, bylaws  
(covered in PTA Basics and Finance for All workshops)
- PTA President – Key Roles or What Do Presidents Do?
- PTA Planning – Getting Started
- Managing Your PTA – How To's  
(covered in President, Part 2)
- Team Building and Working with Conflict  
(covered in workshop of same name)

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## PTA Basics

(covered in PTA Basics and Finance for All workshops)




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**PTA Mission**  
To positively impact the lives of all children and families.

**California State PTA**  
everychild.onevoice.




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## PTA Safety Net


- Unit | Council | District
- California State PTA
- National PTA
- Human Resources
- Training,
- Support,
- Representation

**Units in Councils**



**Out-of-Council Units**






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### PTA Basic Policies

Noncommercial



Nonsectarian



Nonpartisan



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### Your PTA GPS

#### Bylaws

- Association Name
- ID Numbers
- Membership Dues
- Quorum
- Officers
- Nominating Committee and Elections (Month)

#### Standing Rules

- List of VP's – if any
- Meeting Dates
  - Association and Executive Board
- Authorized Expenditures
- Check Signers
- Committees
  - Standing Committees vs Special Committees



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### Required Forms

- Conflict of Interest Form
- Form 990/990EZ/990n (IRS)
- Form 199 or 199n (CA FTB)
- Form RRF-1 (CA Attorney General)
- Form CT-TR-1 (CA Attorney General – New form for PTAs with income less than \$50,000)
- Worker's Comp Form



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### PTA Positions

- **Required by Non-Profit Law & Must be Filled:**
  - *President, Treasurer, Secretary*
- Required by PTA:
  - Parliamentarian, Auditor, Historian, Principal, Teacher Rep
- Optional - Advised:
  - Executive Vice President (general) or Vice President (specific)
- Optional:
  - Financial Secretary, Corresponding Secretary




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### PTA President Duties




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### PTA President's Duties: Communicator

- Oversees and coordinates work of an executive board
- Preside over PTA executive and association meetings
- Approve all materials prior to distribution (as does principal)
- Make chairmen and committee member appointments
- Serves as ex-officio member of all committees except for the nominating committee




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### PTA President's Duties: Financial

- Be familiar with financial procedures
- Sign payment authorizations
- Sign contracts
- Authorized check signer
- Cannot be related by blood or marriage nor reside in the same household as Treasurer or Financial Secretary




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### PTA President Duties: Contracts

- All contracts must be approved by the association before signing
- All contracts must be signed by two elected officers
- The president **MUST** be one of the two
- Sign contracts as follows:

ABC PTA by XXX, Position, Year

*ABC PTA by Mary Smith, President, 2020-2021 and  
ABC PTA by Joe Jones, VP Fundraising, 2020-2021*




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### PTA President's Duties: Collaborator

- Be the official contact, communicator and representative of the PTA
- Attend council/district meetings
- Be responsible for the annual report (volunteer hours)
- Perform other duties assigned by the association
- Meet with the principal regularly
- Official representative of the association




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### PTA President Duties: Principal

- Know and uphold school district policy
- Two-way communication and respect
- Discuss concerns frankly
- Must approve all communications prior to distribution
- Member of the executive board
- Advisor to the nominating committee
- Regular scheduled meetings between the principal and president
- Positive and enthusiastic about the school

Your PTA is a guest on the school campus




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### President & Principal – Joint Responsibilities

- Communication
- Scheduling
- Requests
- Respect
- Promote family engagement
- Support curriculum and school programs




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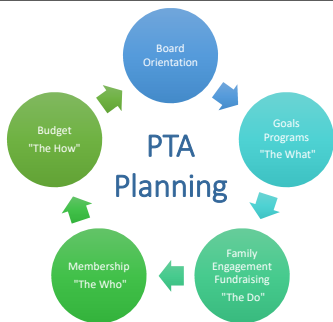
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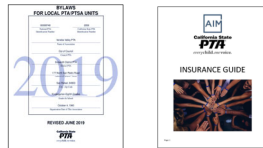
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### Board Orientation

- Ground Rules
- Bylaws
- Insurance Guide
- Procedure Books




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### “The What”: Goals and Programs

- Goals
- Community Needs
- Programs
- PTA Calendar
- Timelines




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### “The Do”: Family Engagement & Fundraising



- Fundraising is not the purpose of the PTA
- Raise money to finance PTA programs and projects
- Follow the 3-to-1 Rule
- Student Involvement




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## “The Who”: Membership

- Membership Goals
- Year-long Campaign
- Develop Plan



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## “The How”: Budget

- Treasurer-elect (before June 30) or Treasurer (after July 1) chairs the budget committee
- Board submits items
- Income = Expenses
- Preliminary Budget
- Budget approved at first association meeting

The PTA programs, events, membership plan, fundraising plan, and budget must be approved by the association at the first meeting of the year and before any plans are implemented.



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