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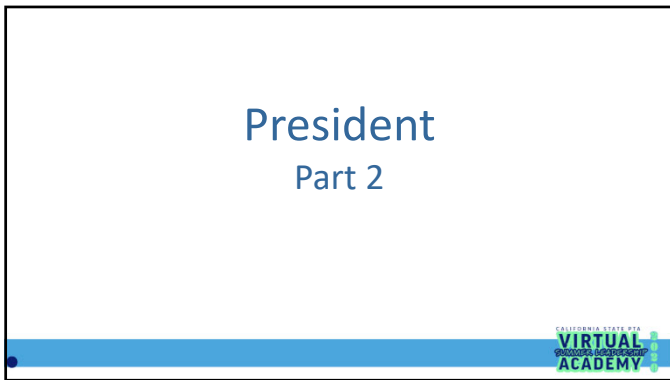
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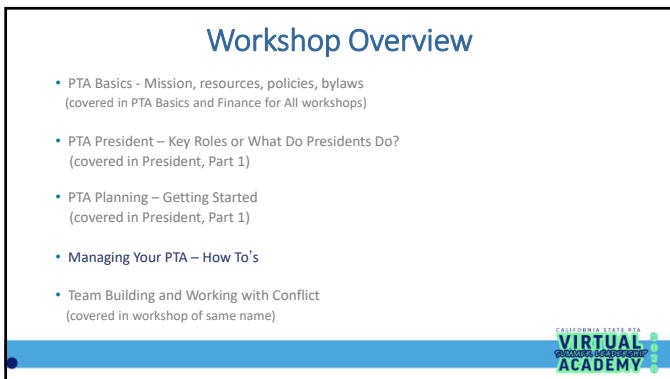
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- PTA Basics - Mission, resources, policies, bylaws  
(covered in PTA Basics and Finance for All workshops)
- PTA President – Key Roles or What Do Presidents Do?  
(covered in President, Part 1)
- PTA Planning – Getting Started  
(covered in President,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

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### 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




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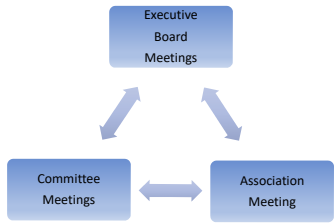
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### Managing Your PTA - Meetings




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### 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




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### Effective Meetings

#### Before the Meeting

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



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### Effective Meetings

#### During the Meeting

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



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### Effective Meetings

#### After the Meeting

- Delegate & follow up on Action Items
- Distribute minutes promptly



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### 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.




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### 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)




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### 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




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### 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

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

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



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### Executive Board – Working Together

What is on an Executive Board Meeting Agenda?



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**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 decision are debated and agreed upon. Association meetings are for reporting these decisions to the parents



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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 the board & association




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## 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

**Fiduciary Responsibility**  
 Shared responsibility of all board members as stewards of PTA assets.

Detailed information in "PTA Basics and Finance for All"




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## 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](http://capta.org))




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### 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.
- Unfinished Business - any items from the previous meeting
- New Business - Motion is needed on action item before discussion/vote
- Adjournment - no motion needed
- Program




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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

#### 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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### 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



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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!



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### Manager of the Team Promise

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



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