

Officers and committee chairs at the local unit PTA level assume the roles of leaders and carry out the responsibilities of leadership. By utilizing council, district, state, and National PTA leader's resources, publications, unit leaders become familiar with the mission and message of PTA, rules of authority (Bylaws), policies, procedures and guidelines.

Local unit PTA leaders have a right to expect advice and support from council and district PTA leaders and be provided opportunities to attend council/district PTA leadership training and skills development workshops (see *California State PTA Toolkit* Council/District Leadership Job Description).

Unit leaders that have been supported and trained by council/district PTA leaders are empowered to provide training, skills development and information to local PTA school and parent members by modeling appropriate PTA protocols, adhering to PTA policies and procedures and by providing communication links between home-school levels of PTA.

**Local unit PTA leaders:**

- Perform the duties of the officer or committee chair as outlined in unit bylaws or standing rules;
- Become familiar with council, district, state and National PTA bylaws;
- Review *Insurance and Loss Prevention Guide*
- Attend council, district, state and National PTA meetings as appropriate;
- Share information and materials received from council, district, state and National PTA;
- Inform PTA board, local school and parent PTA members of new and updated PTA materials and information.
- Hold executive board and association meetings and record meeting minutes as outlined in unit bylaws;
- Publicize notices of association meetings and business to be conducted as outlined in unit bylaws;
- Provide school-PTA information to all parents via a regular PTA communiqué/newsletter;
- Forward monthly and annual reports and information to council PTA as required;
- File annual reports, federal and state tax returns, corporate filings and Workers' Compensation Report, when applicable;
- Safeguard the financial assets of the unit PTA by strictly adhering to PTA financial procedures as outlined in the bylaws, and state and National PTA guidelines
- Preserve records and documents of the unit PTA as required;
- Maintain procedure books to pass on to succeeding officer and committee chairs;

- Facilitate smooth transitions with incoming officers and committee chairs;
- Protect members; privacy by utilizing member information for PTA work only;
- Take advantage of opportunities to attend leadership training and skills development workshops.

Local unit PTA leaders should contact council and/or district PTAs, for assistance with issues, concerns, questions or procedural advice. Unit leaders should seek immediate advice from council/district PTAs for financial red flag alerts, controversial issues, conflict management issues and/or allegations against an officer, chair or PTA member (*California State PTA Toolkit*, Finance, Chapter 9, and PTA Management, Chapter 2).

**RESOURCES AND REFERENCES**

National PTA

*Quick-Reference Guide*, Leadership Section

Website: [www.pta.org](http://www.pta.org)

*Our Children* (National PTA magazine, subscription)

California State PTA

*California State PTA Toolkit* (English and Spanish)

Leadership Pocket Pal (English and Spanish)

Financial Pocket Pal (English and Spanish)

Website: [www.capta.org](http://www.capta.org)

*The Communicator*

*PTA in California* (official newsletter of the California State PTA)

*Insurance and Loss Prevention Guide* (English and Spanish) mailed annually to PTA presidents

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