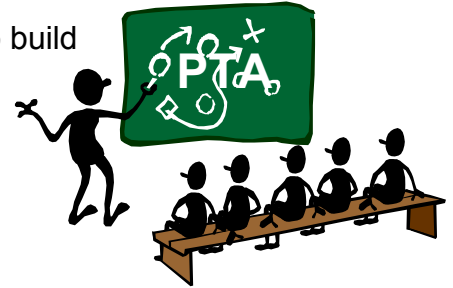


What every PTA president should know from the beginning.....

Team Building

YOU are not the TEAM, **YOUR** job is to empower the TEAM and to build future leaders

- ◆ Set goals and ground rules
- ◆ Everyone must have buy in
- ◆ Diversity
- ◆ Delegate with authority
- ◆ Have fun, and remember...



we are in it for the children!

Ground Rules example

- | | |
|--------------------------------|---|
| → No rank in room | → Stick to a timeframe |
| → Respect everyone's comments | → Stay on task |
| → Nothing goes out of the room | → Don't take anything personally |
| → Speak one at a time | → There is no "turf" on the playing field |
| → Discuss issues, not people | → Agree to disagree |
| → Try not to repeat | |

Support Services

Councils and Districts

- ⇒ Training
- ⇒ Guidance and Assistance
- ⇒ Representation

State

- ⇒ Legislation Conference
- ⇒ Legislation alerts
- ⇒ Convention
- ⇒ Service Mailings
- ⇒ Representation

National

- ⇒ Power of the Organization
- ⇒ Customer Service for Members
- ⇒ Representation

Counterpart Workshops

Many councils and districts provide workshops for a variety of PTA positions. It is the president's responsibility to encourage board members to attend so they are well trained and are able to perform their duties to the fullest.

Resources

- | | |
|--|--|
| ◆ California State PTA <i>Toolkit</i> | ◆ Insurance and Loss Prevention Guide; www.ari-pta.com , username: <i>pta</i> ; password: <i>member</i> |
| ◆ Bylaws | ◆ www.capta.org and www.pta.org |
| ◆ <i>PTA in California</i> newsletter | ◆ National PTA - Quick Reference Guides |
| ◆ Pocket Pals: Leadership, Financial and Education, Parent Involvement | ◆ <i>Our Children</i> magazine |
| ◆ Procedure books | ◆ <i>PTA Fundraising Essentials</i> magazine |
| ◆ Parents Empowering Parents (PEP) Guide | ◆ Building Successful Partnerships (BSP) |

Duties of Members

PRESIDENT'S DUTIES

- ◆ Coordinate work
- ◆ Preside at all meetings
- ◆ Make committee and chairmen appointments
- ◆ Sign all authorizations and contracts
- ◆ Understand financial procedures
- ◆ Authorized check- signer
- ◆ Official representative of the association
- ◆ Responsible for annual report
- ◆ Official contact
- ◆ Meet with school/site administrator
- ◆ Perform other prescribed duties

◆ EXECUTIVE BOARD DUTIES

- ◆ Transact business as directed by the association and conduct business between association meetings
- ◆ Pay bills
- ◆ Create committees
- ◆ Fill vacancies
- ◆ Present reports to association
- ◆ Receive financial reports
- ◆ Protect assets of the association

PTA ASSOCIATION

Only group with authority to:

- ◆ Elect the nominating committee
- ◆ Elect officers
- ◆ Approve/ratify all PTA expenditures
- ◆ Approve all contracts for PTA programs, events, and projects
- ◆ Adopt the budget
- ◆ Adopt the audit reports
- ◆ Elect convention delegates

*****Remember... All PTA activities must be approved by the association to comply with insurance requirements.***

Types of Meetings

➔ ASSOCIATION

Meetings are set in the bylaws
Attendees: Members and guests
Actions: Approves expenditures, adopts budget, and approves all other activities and programs.
 Elects nominating committee and officers

➔ EXECUTIVE BOARD

Meets monthly
Attendees: Officers, principal, teacher representatives, standing committee chairmen
Actions: Review committee recommendations; handle assigned duties, recommend action to the association

➔ COMMITTEE

Meetings as deemed necessary
Attendees: Chairman, members, president
Actions: Meets to handle preliminary work and recommends actions to the executive board

Effective PTA Meetings

Before meeting:

- ◆ Verify meeting locations
- ◆ Review previous minutes
- ◆ Review upcoming (and past) calendar
- ◆ Prepare agenda
- ◆ Contact those who should be presenting a report

During meeting:

- ◆ Start on time
- ◆ Agree on ground rules
- ◆ Review agenda and add items if needed
- ◆ Stick to the agenda
- ◆ Use parliamentary procedures
- ◆ Summarize
- ◆ Give all a chance to participate
- ◆ Restate decisions/ assignments
- ◆ End on time

After the meeting:

- ◆ Distribute minutes promptly
- ◆ Follow- up on assignments

Leadership Services Commission

BYLAWS: Before you begin anything else, read your PTA's bylaws! Go over them with the executive board so everyone understands responsibilities, quorums, meetings, elections, standing rules and basic policies of the organization. Review bylaws each year; submit updates for California State PTA approval at least every 2 years.

CO-OFFICERS: Co-officers are not recognized by the California State PTA. A committee may be appointed to assist the position if needed. Only one vote per position is permitted.

COMMITTEES: Committees are formed for a specific purpose: to plan, promote and implement the activities of the PTA. They function at the discretion of the membership and should be representative of the association. Individuals have the opportunity to learn about PTA, acquire leadership skills, discover resources, and help develop creative solutions. Committees make recommendations; they do not make decisions. Programs must be presented to the executive board, with final approval given by the association. The president is an *ex-officio* member of every committee except the nominating committee.

PROCEDURE BOOK: Due to ongoing changes in leadership, PTA leaders need guidance. Each officer/chairman must have a procedure book to ensure continuity and progress. **A procedure book is NOT personal property and belongs to the office/chairman; not the individual.** A procedure book should contain: materials needed to carry out the work of the office, job description, bylaws/standing rules, agendas/minutes, finance, calendar, reports and directory.

WHO RUNS YOUR PTA?

General Membership (the "association"):

- ◆ The most important component of your PTA, the members are your organization.
- ◆ Members should approve the budget, all expenditures of funds, programs and activities.
- ◆ Executive board meetings do not replace the necessity of reporting and obtaining approval of PTA business.
- ◆ All general (association) meetings and proposed action items must be publicized at least 10 days in advance and provide members an opportunity to speak at meetings, no matter how many attend. General meetings are held in the months stated in your bylaws.

Executive Board:

- ◆ Must be members of the PTA.
- ◆ Meets monthly during the school year. Plans and carries out activities, programs and expenditures, with final approval from the membership.
- ◆ The president sets the agenda for each meeting, but should seek input from executive board members.
- ◆ All board members may make motions and suggestions, including the principal and teacher representative.
- ◆ Follows PTA protocol at all times.

Principal:

- ◆ Serves as an advisor to the nominating committee and the executive board.
- ◆ Has prior approval of PTA information that is sent home with students.
- ◆ Works with the president and board on unit programs and activities.
- ◆ Is a full voting member of the executive board.
- ◆ Has no control over the PTA's money