

## Everything you need to know about being president...

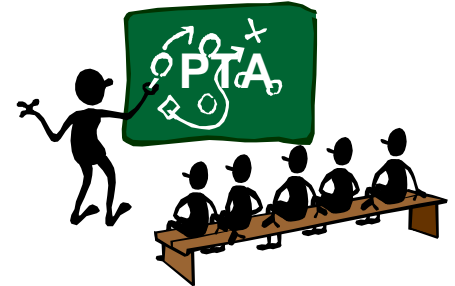
### Team Building

**YOU** are not the TEAM.

**YOUR** job is to empower the TEAM and to build future leaders:

- ◆ Set goals and ground rules
- ◆ Everyone must buy-in
  - ◆ Recruit a diverse team
    - ◆ Delegate with authority
      - ◆ Have fun, and remember ...

**We are in it for the children!**



### Ground rules (examples)

- |                                |   |
|--------------------------------|---|
| → 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            |   |

### PTA Support services

#### Councils and districts

- ⇒ Training
- ⇒ Guidance and assistance
- ⇒ Representation

#### California State PTA

- ⇒ Legislation conference
- ⇒ Legislation alerts
- ⇒ Convention
- ⇒ Service mailings
- ⇒ Representation

#### National PTA

- ⇒ 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 workshops so they are well-trained and are able to perform their duties to the fullest.

### Resources

- |  |  |
|--|--|
| ◆ California State PTA <i>Toolkit</i>  | ◆ Procedure books  |
| ◆ Bylaws   | ◆ Parents Empowering Parents (PEP) Guide   |
| ◆ <i>PTA in California</i> newsletter  | ◆ Insurance and Loss Prevention Guide;<br><a href="http://www.uis-pta.com">www.uis-pta.com</a> , username: pta; password: member |
| ◆ <i>PTA Connects</i> (electronic newsletter)                                      | ◆ <a href="http://www.capta.org">www.capta.org</a> and <a href="http://www.pta.org">www.pta.org</a>                              |
| ◆ <i>The Communicator</i>  | ◆ National PTA - Quick Reference Guides  |
| ◆ Pocket Pals: Leadership, Financial, Education, Parent Involvement and Membership | ◆ <i>Our Children</i> magazine   |
|  | ◆ Building Successful Partnerships (BSP)   |

## Duties of officers and chairmen and 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 the 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 representative, 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  
*Chairman:* Attends executive board meetings when necessary

## Effective PTA meetings

### Before meeting:

- ◆ Verify meeting location
- ◆ 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
- ◆ 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

**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 association. Review bylaws each year; submit updates for California State PTA approval at least once every three 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 a directory.

## Who Runs Your PTA?

### General Membership (the "association"):

- ◆ The most important component of your PTA is the general membership. The members are your association.
- ◆ 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 made up of 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, with input from the 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 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.