My Life As A PTA President
Workshop Overview
My Life as a PTA President

• The Power of PTA
  – Mission, resources, policies, bylaws

• PTA President – Key Roles

• PTA Planning – Getting Started

• Managing Your PTA – How To’s
MISSION: POSSIBLE
The Power of PTA

Mission Statement

The mission of the California State PTA is to positively impact the lives of all children and families.

Adopted August 2013
California State PTA Board of Managers
The Power of PTA

Human Resources – 5 PTA Branches:
• Unit | Council | District
• California State PTA | National PTA

PTA Safety Net:
• Training, Support, Representation
The Power of PTA

More Resources:

➢ California State PTA – www.capta.org
  • Toolkit | Service Mailing | E-news
  • Legislation Alerts | Conference
  • Convention | Scholarships/Grants

➢ National PTA – www.pta.org
  • Online Guides | E-learning Workshops
  • Blogs | Webinars | Programs
PTA Basic Policies

- Noncommercial
- Nonsectarian
- Nonpartisan

What do these 3 policies mean?
The Power of PTA

PTA Bylaws – Your GPS
What is in them?
The Power of PTA

Bylaws tell you about …

- Membership
- Boards + Elections
- Committees
- Association Name
- ID numbers
- Policies Actions Procedures
- Meetings
Questions?
What do PTA Presidents do?
PTA President – 3 Key Roles

Communicator

- Link families, school & community together
- Coordinate work of officers/chairmen
- Run meetings, prepare agenda
- Approve all materials (with principal)
PTA President – 3 Key Roles

**Facilitator** – Financial Procedures

- Sign payment authorizations & contracts
- Sign checks - Authorized check signer
- Ensure reports done & sent to council/district
  - Budgets, Audits, Annual Financial Reports
PTA President – 3 Key Roles

Collaborator

- Official contact
- Meet with principal regularly
- Attend council/district meetings

Other assigned duties

- Appoint Parliamentarian, Chairmen, Committees
- Submit Annual Report – Volunteer Hours
Leadership Qualities

• Be Available
• Show Respect
• Be Confident
• Have Knowledge
• Be Supportive
• Listen Well
• Show Concern
• Be Flexible
• Be Sensitive
• Have Patience
Questions?
Executive Board – Working Together

What is on a Board Meeting Agenda?
Call to Order
- Attendance
- Approval of Minutes
- Reports
  - Financial
  - President
  - Principal
  - Teacher Rep.
  - Officers
  - Committee Chairmen
- Unfinished Business
- New Business
- Announcements

Adjourn

Quick Tip
Board meetings are where busy work happens not at the Association meetings
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 board & association
To Do List

• Protect Your PTA’s Assets
  – Review & understand financial reports
  – Use best practices to handle funds

Fiduciary Responsibility

Shared responsibility of all board members as stewards of PTA assets.
Handling Funds – How To

✓ Money counted by 2 people
  ○ 1 is a PTA officer or chairman

✓ Deposit funds immediately
  ○ Never deposit in personal or school account

✓ Payment authorizations
  ○ Signed by president & secretary
  ○ Never sign blank checks
PTA ‘In-Good-Standing’

- Dues – Forwarded monthly
- Insurance Premium – Due in Dec.
- Audits – Done 2X/year
- Tax Returns – Filed annually
  - State & Federal
  - RRF-1 filed with CA Attorney General’s Office

Learn More – [www.capta.org](http://www.capta.org)
Financial Mismanagement

• How To Handle
  – Report any suspected mismanagement to PTA District ASAP

Early Warning Signs
What ‘red flags’ might you see?
Financial ‘Red Flags’

> Officer/chairman
  - Stops taking calls, coming to meetings
  - No treasurer’s report for meetings

> Check handling process skipped
  - Only 1 signature on checks
  - Checks issued but not approved

> Revenue less than chairman’s counts
Questions?
PTA Meetings – How Tos

Before The Meeting

- Facility use permit
- Advertise
- Review minutes
- Prepare agenda
  - Contact those who need to report
Call to Order

- Pledge of Allegiance
- Approval of Minutes
- Financial Reports
- President’s Report
- Officers’ Reports
- New Business
- Announcements

Adjourn
PTA Meetings – How Tos

At The Meeting

- Start & end on time
- Follow agreed ground rules
- Stay on agenda
  - Use parliamentary procedure
  - Use ‘Issue Bin’

After The Meeting

- Delegate + follow up on Action Items
- Distribute minutes promptly
Questions?
PTA Planning
5 Steps

Board Orientation

Goals Programs
“The What”

Budget
“The How”

Membership
“The Who”

Family Engagement Fundraising
“The Do”
PTA Planning – Tips

**Board Orientation**
- Ground Rules
- Bylaws
- Insurance Guide
- Procedure books

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

**Goals ‘The What’**

**Budget ‘The How’**
- Board submits items
- Income = Expenses
- Preliminary Budget

‘The What’

‘The How’
Membership 'The Who'
- Membership Goals
- Year-long Campaign
- Develop Plan

Family Engagement Fundraising 'The Do'
- Funds needed for activities
- 3-to-1 Rule
- Student Involvement

First Association Meeting
- To approve:
  - Programs
  - Budget
  - Membership Plan
  - Fundraising Plan
Questions?
Managing Your PTA

How to Work Smarter

• Ground Rules
• Goal Setting
• Communication
  – Conflict Management
• Team Building
Goal Setting – Use SMART Goals

Why is it important to set goals?

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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
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!

Did you know … You are not the Team?
Questions?