



CHRISTY BROWN

Vice President, Leadership

DUTIES

- Director of Leadership Services
- Aide to the President
- Attends Council Presidents' meetings
- Coordinates disbanding of units / school closings
- Coordinates organizing and chartering new PTAs / PTSAs
- Chair of District Leadership Team
- Chair of District Orientation
- Chair of District Leadership Conference
- Oversees Vice Chair of Leadership



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PTA1.org

First District

PTA®

everychild.one voice.®

What Do Councils Do?

The council provides the units an opportunity for cooperation in promoting their common interests and discussion their common issues. It coordinates the work of the member units and other agencies or organizations in the area working for children and youth. It serves as channel of communication between the state and district PTA and the units.

☐ Collaboration

- Facilitate a common vision and goal
- Meet regularly with units
- Provide training for units
- Model good leadership skills
- Build relationship skills

☐ Coordination

- Survey units for common needs/concerns
- Provide leadership and organizational support
- Invite speakers to address common needs/concerns
- Promote common interests and share ideas
- Encourage attendance at district trainings and convention

☐ Communicate

- Share information with units regularly with unit officers
- Attend district PTA meetings and events
- Distribute information promptly to units
- Solicit information/concerns from units and report to district

☐ Develop and Strengthen Leadership

- Provide ongoing training
- Strong communication
- Visit unit meetings
- Offer support and build rapport
- Encourage unit leaders to serve on council committees
- Coach potential leaders
- Be a good example

☐ Build relationships with School District

- Meet regularly with the superintendent
- Attend school board meetings to report on PTA activities
- Provide PTA representatives for committees

☐ Working with Units

- Visit each unit
- Assign a mentor to each unit
- Help units remain in good standing
- Be available to help
- Assist when requested or when issues arise
- Celebrate their successes

☐ Responsibilities

- Schedule due dates
- Collect and review report forms, required documents
- Remit dues and insurance promptly
- Enhance PTA's public image by modeling appropriate behavior in person, in writing, in email, and in all social media

☐ Provide Training

- Model good leadership and parliamentary skills
- Attend trainings provided by First District and California State PTA
- Plan and provide training to your units
- Use training materials from First District/CAPTA

☐ Projects and Programs

- Coordinate on special events and programs
- Include a short training segment at each board meeting
- Spearhead community projects
- Collaborate with units on special events and programs

☐ Information to Collect/Review

- Bylaws
- Membership remittances by month
- Rosters, financial reports, and audits all to be uploaded to myPTEZ

The council president is an elected officer and serves as a vital link between the district PTA and the member units.

WHAT TO DO

PRIOR TO BEGINNING OF TERM

- Review responsibilities of council president as outlined in council bylaws.
- Meet with liaison from school district and/or superintendent's office.
 - Request agenda time to be introduced at a meeting of the district principals.
 - Prepare an overview of the council and goals for the upcoming year.
- Meet with council program planning and budget committees.
- Work with the other incoming council officers to prepare the council calendar for the upcoming year and prepare any required facility use forms. A council may meet in a central school district location or may rotate the council meetings among the member units' sites.
- Determine if names and addresses of newly elected council officers have been sent to the district PTA for forwarding to California State PTA and National PTA. If this has not been accomplished, complete the list and mail immediately. All materials mailed from California State PTA and National PTA will be addressed to the council president who is responsible for sharing it with the appropriate council officers and chairmen.
- Determine if names and addresses of newly elected officers for PTA units within the council have been sent to the district PTA for forwarding to California State PTA and National PTA.
- Distribute a council roster or directory to the school district office(s).
- Read and become familiar with the council bylaws and standing rules.
 - Note date when new officers and chairmen assume office.
 - Fill appointive offices as specified in the council bylaws (e.g., parliamentary).
- Bylaws stipulate that the council president-elect shall be one of the PTA council's delegates to the California State PTA convention, usually held in May. Attend the district PTA convention orientation meeting and study materials to be an informed and knowledgeable delegate.
- Attend workshops offered by your district PTA and urge incoming board members to attend. Notify incoming unit officers of the scheduled workshops.
- Coordinate with the council treasurer-elect to have the signature cards for the council's bank accounts updated with the new officers.
- Ask for the council president's procedure book and review it and all materials received from the previous council president.

ONGOING

- Determine procedure with council membership chairman for receiving membership cards from district PTA and review distribution procedure to member units.
- Prepare meeting agendas (check with the council secretary and/or minutes for any unfinished business to be included). Provide copies for the secretary and parliamentary.
- Attend all meetings of the district PTA as the council representative.
- Review all service mailings received from California State PTA and National PTA promptly. Be alert for any due dates that affect the council and the member units. Share materials as appropriate.
- Notify the member units of the amount of the premiums for general liability, directors and officers liability and Workers' Compensation insurance as soon as received from the district PTA. Be alert for the due dates to the district PTA and coordinate the council due dates with the council financial secretary and treasurer.
- Alert membership for all due dates that affect the member units. Set reasonable dates for due dates for items to reach the council and to be processed and forwarded to the district PTA.

Items with due dates include:

- Membership awards
- Reflections Program entries
- Insurance premiums
- Workers' Compensation report forms
- Annual Report forms
- Convention registration
- Submission of unit and council officers and chairmen names to district PTA

- Plan workshops for the member units. Ask for any needed assistance from the district PTA officers.
- Request a copy of the membership awards application from the district president.
- Work with program chairman to complete plans for Founders Day.
- Forward any proposed resolutions for California State PTA convention in time for district PTA action.
- Remind member units of March due date for final remittance of per capita dues through channels.
- Review bylaws with council PTA parliamentarian for any needed changes and appoint a committee to assist.
- Forward any proposed resolutions for California State PTA convention in time for district PTA action.
- Remind member units of March due date for final remittance of per capita dues through channels.
- Review bylaws with council PTA parliamentarian for any needed changes and appoint a committee to assist.
- Check bylaws for date and procedures to elect nominating committee and delegates who will attend the annual California State PTA convention.
- Conduct election of new officers at annual meeting as specified in the bylaws. Immediately following the election, send names and addresses of new officers to district PTA.
- Conduct election of delegates to California State PTA convention at least 30 days prior to convention. Each PTA council is entitled to send two delegates. (See *Bylaws of California State PTA*, Article XIII, Section 5, c.) Elect an alternate for each delegate.
- Prepare convention pre-registration and housing materials as instructed by district PTA. Notify council delegates of convention orientation date scheduled by district PTA.
- Work with council historian to compile annual report and mail report to meet district PTA due date. Be available to provide assistance to member units in completing the form by the due date.

END OF TERM

- Give materials to the president-elect immediately following election. Complete procedure book and give it to the new president when office is assumed.
- Check with other council officers to be sure their procedure books are up-to-date. Encourage cooperation and sharing of materials between outgoing and incoming officers.
- Invite incoming president to attend meetings of district PTA and meetings of community groups.
- Schedule a time to introduce the incoming council president to the superintendent of the school district.
- Ensure outstanding bills have been paid, committee reports have been filed, projects have been completed, and that financial books are scheduled for audit.
- Call for the motion authorizing the executive board to pay necessary summer bills.
- Appoint a committee to read the minutes and report at the next council meeting.

When your term as council president is completed, stay involved but not in charge.
Be available for advice, **when asked**.

DATES OF COUNCIL OR DISTRICT PTA WORKSHOPS

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 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

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 organization. Review bylaws each year; submit updates for California State PTA approval at least 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 membership. 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 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, 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.



PTA - Principals - Superintendents

Greatest Strengths

- Involvement of parents in child's education
- Communication bridge between school and community (parents)
- School Smarts Training
- Collaboration
- Addition of different, much needed perspectives
- Another level of school site accountability
- Fundraising helps to supplement both academic and social activities
- Insurance coverage

Greatest Challenges

- Sometimes rolls are not clear
- PTA wants to do it their way without following school/district rules
- Some parent leaders will undermine staff/administrators
- Finding and recruiting members and leaders
- PTA leadership sometimes works in opposition of school vision/mission
- Active PTAs can bring more nights and weekends for administrators

Tips for approaching and working with Principals

- Provide dates and times of PTA meetings
- Set up a time to meet with them monthly
- Ask questions as opposed to telling what you want to do
- Remember PTA is a guest on school sites
- Clearly define what their role is
- Provide a copy of the bylaws, insurance coverage
- Approach from the perspective of how PTA could support site leadership

Tips for approaching and working with Superintendents

- Provide dates and times of PTA council meetings
- Have PTA council set up a monthly meeting with the district office
- Work with Assistant Superintendents
- Identify a key person in the district to work with
- Invite to all PTA programs and events – be flexible and understand that if a “no” to an invite is received, it's likely they are overbooked, not because they don't care

Communicate the need for administrators to not serve as an officer on the PTA board

- Stress that they serve as a member of the board in an advisory capacity
- Be candid that it may make volunteers uncomfortable
- Stress that PTA is an independent non-profit
- Can be a conflict of district employee policy

What PTA leaders can do to be more inclusive of all families and children

- Get to know the demographics and how to reach and meet parents
- Tap into the School Smarts graduates for PTA involvement
- Have a liaison to different groups
- Tap into contributions of working parents who can't attend meetings
- Find small tasks for those who have a lot of commitments but still want to be involved

Fundraising

- PTA and site leadership need to discuss how fundraising efforts will align with the school vision and goals whenever possible
- Ask for input from teachers and staff
- Be student centered in use of funds
- Provide guidelines as to what PTAs can and cannot do

Collective Bargaining – Maintaining Neutrality

- Collective bargaining is between the union and the school district and does not nor should it involve local PTAs or Council PTAs
- Key leaders need to step in and remind those involved that this is not a role of PTA...
"While I can support you as an individual staff member, please know that PTA does not get involved in collective bargaining."
- Make sure that ALL PTA leaders are aware of remaining neutral, provide them with the guidelines and policies pertaining to this

REQUEST FOR LEADERSHIP SERVICES**Instructions:**

Complete at least **two weeks prior** to requested date and send/e-mail directly to the First District Vice President of Leadership Services-
leadership@pta1.org and the President- president@pta1.org for approval.

Council/Unit President _____ Council/Unit PTA _____

Phone _____ Cell _____ Email _____

District Officer(s)/Chairman Requested	Field Service Topic Requested	Time Allotted	Handouts Needed	Date Confirmed w/participant

Services Requested (check all that apply)

☐ Workshop ☐ Board Training ☐ Council/Unit Assistance ☐ Guest Speaker

Meeting Information

Date: _____ Time to start: _____ To end: _____

Name of meeting venue: _____ Room: _____

Street address: _____

City: _____ Zip: _____

Program Topic: _____ Anticipated number in attendance: _____

Audience will be composed of representation from:

☐ Units ☐ Council ☐ Teachers ☐ Administrators
☐ Students ☐ Community ☐ Other: _____

The event will be publicized by:

☐ Fliers ☐ Council/Unit Newsletters ☐ E-mail Blasts ☐ Website

The room will be equipped with the following:

☐ Table with microphone ☐ Podium with microphone ☐ Floor microphone
☐ LCD projector ☐ Computer ☐ Screen

Council/OOC President Signature _____

Date: _____

Field Service Approved _____

Date: _____

First District Vice President of Leadership