

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.[®]

Key Role – President

- Oversees and coordinates the work of an executive board to run a PTA effectively
- Presides at PTA board and association meetings
- Serves as the official contact, communicator and representative of a PTA
- Designated as an authorized signer for PTA checks, contracts and authorizations for payment
- Serves as ex-officio member of all committees except the nominating committee
- Works with other PTA leaders to connect families, school and community to support student success

Getting Started

Preparation – Review files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities in running a PTA
- Duties of each officer and chairman
- California State PTA policies, procedures and resources
- PTA council and district information
- Community resources

To expand your skill sets as a leader, plan to attend PTA council/district training along with the other members of your board.

Start recruiting chairmen and committee members, selecting first those whose work begins right away such as programs, budget, membership and communications.

Encourage experienced and new members to get involved and share the workload to grow leadership for today and tomorrow.

Networking – Soon after election, meet with the current president to talk about your new role, what works well and what needs to be tweaked to make your PTA even better.

Discuss ways to share information and files among outgoing and incoming board members to ensure a smooth transition.

Get connected by participating in meetings with your council/district PTA, principal and community partners. And, as a unit delegate to the California State PTA convention, take part in your PTA district's convention orientation.

Board Orientation – Arrange for the incoming board to meet to begin organizing for the new term.

To help select what PTA activities to focus on, encourage everyone to assess last term's programs and efforts. That way, you don't need to reinvent the wheel in making your plans.

At your board orientation, take time as well to:

- Set ground rules for meetings
- Identify 2-3 priorities as a team to make a difference in your school community
- Review your Bylaws to learn more about PTA
- Check the Insurance Guide for the Green-Yellow-Red Light activities a PTA can sponsor
- Get to know each other better and build relationships

At orientation, your board can also ratify the officers, chairmen and committee members appointed by the president and fill any vacant board positions so they can begin their activities. This may also be done at the first board meeting after the term begins.

Important Tasks – At the start of the year, submit a board roster, with names and contact information, to your council or district PTA.

Remember to update the signature cards for any PTA bank account and any usernames and passwords for access to the PTA website, social media and online services.

Did you know? ... PTA Board Members:

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

How Tos

Running Your PTA – Monthly Activities

As the team leader, the president oversees and coordinates the work of the executive board in running a PTA.

Here are some tasks that, typically, the president works on each month.

Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Lead board meetings, following the agenda to keep everyone on task
- Review board reports including those prepared by the treasurer, financial secretary and membership chairman plus the secretary's minutes from board meetings
- Sign PTA checks and authorizations for payment along with another, designated board member

Collaborating:

- Touch base with other team members about their plans and preparations for upcoming events
- Meet with the principal to share information on PTA and school activities and to clear all PTA written materials before publishing in hard copy or posting online
- Ensure that PTA volunteer hours are recorded and tallied for the Annual Historian Report

Communicating:

- Update board, members and community stakeholders on PTA plans and activities, encouraging input and feedback
- Thank PTA volunteers for their time, talents and efforts
- Promote outreach, inclusion and diversity to connect families, school and community

Managing Meetings – Quick Tips

PTA surveys tell us that members say meetings are effective when they know why they are meeting, believe their time was well-spent making decisions and feel they accomplished something at a meeting.

That's why the president's primary role at meetings is to act as a facilitator to set the tone and manage PTA business in an effective way. And, the main role of the board is to come prepared and assist the president in working through the agenda.

Here are some ways to help make meetings more effective and productive:

Before A Meeting – As part of your preparation, consult with other board members to identify the meeting's chief objectives, activities to engage participants and who will present verbal and written reports. This helps determine what to include in the agenda that you'll create for the meeting.

Send the agenda to participants ahead of time and widely publicize the purpose of the meeting.

To boost participation, add social time before or after a meeting for everyone to network. And, recruit interpreters and translate handouts in home languages for your meetings.

At A Meeting – Successful meetings give you an opportunity to inform, inspire and empower members. To run an effective meeting, keep everyone on track and time by following the agenda.

As the facilitator, it's also important to remain fair and unbiased so everyone feels welcome and able to participate.

At the end of the meeting, take time to summarize what was accomplished and important next steps for business items.

After A Meeting – Share the results of the meeting with participants to keep them connected to the work of your PTA. And, follow up with officers and chairmen on next steps and action items to complete tasks and accomplish goals.

Working With Administrators – 6 Effective Ways

School leaders and the PTA represent two important groups on the school campus: staff and parents. They work closely together at a school site as partners in education to support student success.

To nurture this important partnership:

1. **Set the Tone** – Build a relationship and collaborate together.
2. **Two-Way Communication** – Meet with the principal early in the year and keep him or her updated on events, activities or concerns.
3. **Collaborating with the School** – Be aware of the school's improvement needs and encourage PTA members to actively participate in school site councils, governance teams, or related committees.
4. **Training Opportunities** – Offer to provide parent training and resources at the school.
5. **School District Level Involvement** – Use the school district's master calendar to become aware of activities where PTA's presence is needed and request an opportunity to provide a presentation at school board meetings.
6. **Build a Strong Team** – Ask for the principal's help in encouraging staff to become PTA members. Learn from others and share your knowledge as well.

Other Useful Information

Resources:

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- PTAEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice* Blog

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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 President and Principals WORKING TOGETHER

PRINCIPALS DESCRIBE A GOOD PTA PRESIDENT

- Good organizer
- Has the welfare of children at heart and does not seek personal glory
- Works well with others and gives credit to others
- Friendly, tactful and intelligent
- Knows and upholds school policies
- Delegates responsibility
- Decisive, but not dictatorial
- Presides well

Principals report these are the things that obstruct good relations:

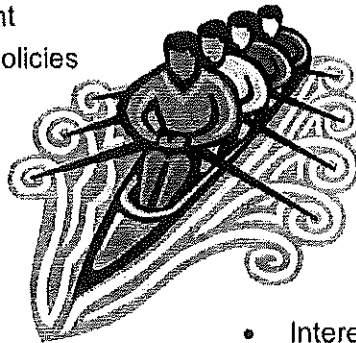
- Lack of understanding between the school and the PTA
- Relationships between individuals – gossip and cliques – jealousy among members
- Lack of cooperation in planning
- Parents trying to direct the school program
- Pressure groups
- Lack of trained PTA leadership
- Lack of planned program
- Feeling that PTA is being used to criticize school and teachers
- Lengthy business meetings
- PTA leaders unwilling to take suggestions

PTA PRESIDENTS DESCRIBE A GOOD PRINCIPAL

- Cares for, and is concerned about children
- Cooperative, friendly, intelligent and has a sense of humor
- Knows and understands the work of PTA
 - Well trained in his/her field
 - Inspires loyalty and confidence of staff, parents, and students
 - Willing to listen to parents
- Interested in the community
- Active in the PTA

PTA Presidents report these are the things that obstruct good relations:

- Lack of understanding between the school and the PTA
- Lack of participation by teachers
- Lack of interest on the part of the principal or one who is too dominant
- Teachers who feel PTA is trying to run the school
- Failure to talk over problems
- Making plans without consulting with the principal
- Individuals who seek PTA office to exploit themselves or their children
- Failure to keep personal matters out of meetings
- Gossip and cliques





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:	
<input type="checkbox"/> Units <input type="checkbox"/> Council <input type="checkbox"/> Teachers <input type="checkbox"/> Administrators <input type="checkbox"/> Students <input type="checkbox"/> Community <input type="checkbox"/> Other: _____	
The event will be publicized by:	
<input type="checkbox"/> Fliers <input type="checkbox"/> Council/Unit Newsletters <input type="checkbox"/> E-mail Blasts <input type="checkbox"/> Website	
The room will be equipped with the following:	
<input type="checkbox"/> Table with microphone <input type="checkbox"/> Podium with microphone <input type="checkbox"/> Floor microphone <input type="checkbox"/> LCD projector <input type="checkbox"/> Computer <input type="checkbox"/> Screen	

Council/OOC President Signature _____

Date: _____

Field Service Approved _____

Date: _____

First District Vice President of Leadership