

JESSICA SHEEN

President

DUTIES

- Coordinates the work of all District officers and committees and supervises office staff
- Presides at all Board of Directors, District Board, and District Association meetings
- Represents First District PTA at
 - California State PTA Board of Managers Meetings
 - Annual California State PTA Legislation Conference
 - California State PTA Convention
 - National PTA Convention



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PTA1.org

First District

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A PTA PRESIDENT'S ROLES AND RESPONSIBILITIES

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected.

Responsibilities include:

- Chairing board and general meetings
- Overseeing fiscal compliance
- Serving as a liaison with school administration or community partners
- Checking in regularly with officers and committees to ensure the overall plan is on target
- Identifying challenges and inviting solutions
- Familiarizing yourself with all PTA programs and resources
- Representing PTA to the community
- Recruiting and mentoring volunteers and future leaders
- Volunteering at events, when available

Great presidents often have leadership, planning and public speaking skills and experience.

A PTA PRESIDENT'S FIRST 30 DAYS

If your team takes each of the following steps in (roughly) your first month in office, you'll be off to a fantastic start! These are great things to do during the summer months as you prepare for the school year.

REACH OUT

First District PTA is here to help and support you. Getting connected right away will make your job much easier! Visit the First District PTA website at pta1.org.

GATHER

There are several items you'll want to put your hands on right away, to be sure important records aren't lost in the transition. PTA records and materials belong to the unit, not to any one individual, and all materials should be passed on to the new leaders. These include:

- **Your PTA's Bylaws.** You and your board are responsible for following the bylaws, so you need to know what they say. If they are old and no longer relevant, one of your first moves should be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA. Your Council or District PTA can help.
- **PTA Procedure Book or "Board Book".** Whether it is an electronic file, a cardboard box full of papers, or a binder thick with documents, get up to speed on what has happened in the past.

- **The most recent audit.** You may need to talk to the treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done as soon as possible. You will want to start fresh with a new set of books, so be sure the previous accounts are "closed" or "zeroed out" and audited.
- **Bank statements and electronic access.** Make sure you have the usernames and passwords, documents, accounts, etc., to access your PTA's financial information.

LISTEN

Before you begin planning, it is important to understand your unique community's strengths and needs. You will do more of this in the months to come, but for now:

- **Convene with the outgoing president and officers.** Talk about how you will reach out into your school and community to understand the priorities for your PTA. What worked last year? What did not? Who do they see as volunteers to encourage and grow?
- **Introduce yourself to the school personnel and administration.** Ask about their priorities for the year and tell them you are interested in helping them achieve their goals. If your PTA is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
- **Introduce yourself to families and members of your PTA.** Ask what they think is working or not working. It is important for members to see a smooth transition and to feel that new leaders welcome their questions, ideas, and participation in the year ahead. A great way to start is with a survey. Every interaction is an opportunity to encourage members to renew and new families or teachers to join.

PROTECT

Take these few, critical steps right away to safeguard your PTA's nonprofit status and protect your unit from theft, fraud, and liability.

- **Your unit is a 501(c)(3) nonprofit** (all PTAs are), so ask your outgoing president or treasurer for the most recent IRS Form 990 filing.
- **Change the signatures on your PTA's bank accounts.** You will want to be sure previous officers no longer have access to your financial accounts. A transition letter from the outgoing treasurer to the bank may be necessary to enact this change.

Remember to pay your insurance premium when the payment is due. Insurance can protect your board members, events, and PTA property.

EFFECTIVE PTA LEADERSHIP STRATEGIES

Welcome all families, school staff and community members in a way that values their unique strengths, abilities and interests. PTAs create inclusive environments by embracing and valuing diverse perspectives and building intentional, authentic relationships.

Communicate effectively by listening and deeply understanding the perspectives of their community's families, teachers, administrators and students; by offering an individualized experience by communicating frequently and through a variety of methods, including personalized outreach; and by using feedback to create programs tailored to families' interests and needs.

Focus on student success by planning PTA programs that are integrated connected and aligned with the broader education system to support student achievement and well-being.

Identify and advocate for specific school improvements. PTA leaders serve as a resource for parents, helping them navigate the school and community and speak up for their students' unique needs. Create a lasting impact, by providing opportunities for families to develop knowledge and skills that will enhance their children's educational experiences.

Create a board that works like a team by sharing power and growing the volunteer pool with different perspectives; resolving conflicts in a positive, productive way; showing children by example how teamwork can make their world a better place.

Collaborate with outside organizations or companies and provide a critical link between families, the school and the community. PTA leaders are the champions of school community and pride.

Develop an inclusive PTA through the lens of “The Four I’s of Family Engagement”:

- Inclusive: Intentional relationship building, inviting diverse perspectives, Questioning assumptions
- Individualized: Personal invitations, tailored experiences, being responsive
- Individualized: Putting the “T” in PTA, linking to learning, going beyond one-time events
- Impactful: Developing knowledge & skills, opportunities to practice & interact, measuring success



FIRST DISTRICT COUNCIL/OUT-OF-COUNCIL PRESIDENT REPORT

Name:

Council:

Date:

Reports are due: September, December, February and May

CRITICAL ISSUES / NEED DIRECTION

Use this space to call attention to areas of concern for which a response is requested.

LEADERSHIP SERVICES

Field services, contact with advisor, organizing, disbanding, concerns, training/workshops

EDUCATION

All education related issues (reading, arts in education), testing, school finance, collective bargaining

MEMBER SERVICES

Membership, Reflections, publications, annual reports, programming, Founders Day, student involvement, historian

COMMUNICATIONS

Information about district newsletter, and news releases, public relations, television programs

HEALTH

Red Ribbon Week, HIV/AIDS programs, all health-related concerns including environmental concerns

COMMUNITY CONCERNS

Child safety, school safety, disaster preparedness, juvenile justice, all community-related issues not falling within the other subject matter commissions

PARENT INVOLVEMENT

Parenting education programs, PEP Guide and National PTA materials

FINANCE

Insurance, fundraising, financial practices, Honorary Service Awards program, scholarships/grants

PARLIAMENTARIAN

Bylaws and standing rules, nominations and elections, parliamentary concerns

LEGISLATION

All aspects of legislation

ANNUAL CONVENTION

All aspects of convention

Professional Governance Certificate

The California State PTA has adopted the professional governance standards. Every PTA is encouraged to adopt professional governance standards at the beginning of each term.

The California State PTA will issue a certificate to each PTA that adopts the professional governance standards.

Mission Statement of the California State PTA

The mission of the California State PTA is to positively impact the lives of all children and families by representing our members and empowering and supporting them with skills in advocacy, leadership, and communications.

California State PTA Board of Managers, July 2007

Purposes of PTA

To promote the welfare of children and youth in home, school, community, and place of worship.

To raise the standards of home life.

To secure adequate laws for the care and protection of children and youth.

To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.

To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

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Professional Governance Standards

The California State PTA would like to recognize your PTA for its work. Please notify the California State PTA that your PTA has adopted the Professional Governance Standards. A certificate will be mailed to the PTA president and a letter of acknowledgement will be sent to your administrator.

Name of PTA _____ ID# _____

Name of Principal _____ Number of PTA Executive Board Members _____

Name of PTA President _____

Mailing Address _____

Email Address _____

Date Adopted _____ Council _____ District _____

PTA President Signature _____

PTA President Signature _____

Mail to: California State PTA, 2327 L Street, Sacramento, CA 95816-5014
916.440.1985 • FAX 916.440.1986 • www.capta.org • info@capta.org

Professional Governance Standards

The bylaws and standing rules for each PTA provide a framework for the organization. In order to operate effectively using this framework, PTA executive boards and individual board members will benefit from adherence to professional standards of governance.

Professional governance standards specify principles involved in governing responsibly and effectively and were developed to support PTA boards in their efforts to enhance their membership's and the community's understanding about the responsibilities of the PTA board.

The PTA Executive Board

The members of the PTA executive board work together as a governance team which assumes collective responsibility for building unity and creating a positive climate during term of office. To operate effectively, the executive board:

- Develops a unity of purpose by involving parents/guardians, students, staff and community
- Communicates a common vision
- Operates with trust and integrity
- Remains responsive to input from the school community
- Governs in a professional manner, treating everyone with civility and respect
- Fulfills requirements set within bylaws and standing rules

The Individual Board Member

A PTA board member is a person elected or appointed to serve on a PTA executive board. Individual board members bring unique skills, values and beliefs to the PTA board and in order to function effectively, individual board members must work together for the association. To be effective, an individual board member:

- Recognizes and respects differences of perspective and style among the individual board members
- Acts with dignity and understands the implications of demeanor and behavior
- Honors the confidentiality of board discussions
- Is open to new ideas and suggestions
- Is familiar with the bylaws in respect to the individual position as well as the organization as a whole
- Understands that authority rests with the board as a whole and not with individuals
- Understands that the basis for all authority rests with the membership

- Takes collective responsibility for the board's performance
- Proposes for adoption by the membership a fiscally responsible budget based on the organization's vision and goals
- Monitors the fiscal health of the association regularly
- Ensures that safe and appropriate activities are provided to implement the goals
- Provides community leadership on issues that affect children and youth

To be effective, an individual board member:

- Participates in opportunities for training
- Commits the time and energy necessary to be an informed and effective leader
- Assists those with less experience
- Understands the distinctions between PTA and the school staff and refrains from performing functions that are the responsibility of the school district
- Values, supports and advocates for public education
- Represents the PTA only when authorized to do so
- Works collaboratively with other groups and agencies that share the same concerns on issues that affect children and youth
- Encourages individual board members to attend available training opportunities
- Serves as a communication link between the home, school and community
- Evaluates the activities and direction of the board on a regular basis

"With strong leadership, PTA will have the competent, committed people necessary to be effective advocates for children and youth."

California State PTA Toolkit