Unit President: Ready, Set, GO!
Workshop Agenda

- Welcome
- Introductions
- About PTA
- President/Executive Board Duties
- Financial Responsibilities
- Committees
- PTA Planning
- Types of Meetings
- Running your PTA
- Handouts/Resources
- Q & A
About PTA

- Unit (that’s you)
- Council (Palomar)
- District (Ninth)
- State (CA)
- National PTA

ALL are volunteers just like you!
Why All The Rules?

Why does PTA have all these rules?

- National & State Laws for Non-profits (Included in bylaws)
- California corporate code
- Best practices (Toolkit)
- Insurance
Your PTA Bylaws

• Read them!
• First source for answers
• Basic policies of the association
• Membership and dues
• Officers and election
• Duties of officers
• Standing Rules
  o Customized for your unit
• Ask the council parliamentarian for help
PTA President’s Duties

- Coordinate work—promote purpose of PTA
- Preside at all meetings
- Make Appointments (chairs, parliamentarian, committees, others)
- Sign ALL payment authorizations, checks, and CONTRACTS
- Know your stuff (or where to get the answers)
Executive Board Duties

- Who makes up the Board?
- Transact business as directed by the association and business between association meetings
- Pay bills
- Fill vacancies
- Present reports to the association
Executive Board Duties

- Review financial reports
- Protect assets of the association
- Understand the organization
- Create committees
- Hold meetings
Financial Responsibilities

- Never sign a blank check
- Forward per capita monies through channels monthly (or at council meeting)
- Never deposit association funds in a personal account or in a school account
- Ensure record keeping is complete and accurate
- Make sure funds are counted by a board member and one other, and deposited immediately
Financial Responsibilities

- Financial records audited twice a year
- Review & sign all payment authorizations
- Make sure tax returns are filed
- Assign a non-check signer to open and review bank statement
Financial Mismanagement

- Report any suspected mismanagement to PALOMAR COUNCIL PTA – IMMEDIATELY!

- Red Flags
  - Officer or chairman stops taking calls, coming to meetings
  - Any financial procedures not being followed
  - Treasurer doesn’t have report for meetings
  - Revenues less than chairmen’s counts
  - Deposits slow
  - Feels strange or you have a question
Committees

- Programs
- Budget
- Membership
- Fundraising
Programs Committee

- Chaired by Programs VP/Chairman
- Determine what the school community needs/wants
- Compile a program calendar (be sensitive to holidays and observances as well as school calendar)
- Complete facility use permit via Facilitron system
- Report to the rest of the executive board at board meeting
Budget Committee

- Chaired by Treasurer
- Decide what you want to do and how much you think it will cost
- Invite board members to submit requirements/suggestions
- Estimate probable income from all sources
- Unit goals and program committee determine budget—it is only a plan and can be modified as year progresses
- Balance income with expenses
Membership Committee

- Chaired by Membership VP/Chairman
- Know the “Why?”
- Establish membership goals
- Design year-long campaign
- Consider a customized teacher/staff campaign
- Develop and implement a plan to attract new members and retain current members
- Membership tracking/monthly report
- eMembership pilot
Fundraising Committee

- Realize fundraising should not be the primary focus of the PTA
- Design methods of raising money to finance PTA programs and projects
- Don’t fundraise more than you need for that year’s programs and carryover
- Cash gift to school is OPTIONAL and requires a fiduciary agreement
The PTA goals, programs, budget, membership plan and fundraising plan must be approved by the association at the first meeting of the year and before any plans are implemented.
PTA Meetings

Association Meetings
Executive Board Meetings
Committee Meetings
Association Meetings

- Month and day set in the bylaws
- Open to all members
- Approve expenditures, adopt audits, adopt budget, elect nominating committee and elect officers
Executive Board Meetings

- Meets monthly
- Open to officers, standing committee chairmen, principal and teacher representative(s) and others ONLY as stated in the bylaws
- Review committee recommendations/reports, handle assigned duties, review finances, recommend action to the association
Committee Meetings

- Committee chairman and members are appointed by the president and ratified by the executive board.
- Open to chairmen, committee members and president (ex-officio member for all committees except nominating committee).
- Handle preliminary work and recommend action to the board.
- Motions brought from committee do not require a second.
Effective Meetings

- Start on time
- Follow agreed upon ground rules
- Stay on the agenda
- Use parliamentary procedure
- Give everyone an opportunity to participate
- End on time!
Motions

Why?
keep order—keep track—be fair—relevant discussions

Eight Steps
- Any member—*I move that*
- Any other member **Second (unless coming from committee)**
The president puts the question/motion on the floor:
- *It has been moved and seconded that _______*
- Is there any discussion? (debate, questions)
- All those in favor say “Aye”, All those opposed say “NO”
- The motion is Passed/Failed
Running Your PTA

- Ground Rules
- Goal Setting
- Team Building
- Communication
- Conflict Resolution
Ground Rules

- Examples
  - Respect everyone’s comments
  - Respect confidentiality of the mtg
  - One speaker at a time
  - Stay on task
  - Agree to disagree
  - Start and end on time
  - Give everyone a chance
  - Have fun
Goal Setting

- Set goals for the upcoming term
  - Do this as a team—whole board
  - What do you want to accomplish?
  - DREAM BIG!!!
  - Evaluate
    - Resources (people/money/talent)
    - Time
  - Write/post/share your goals
  - Re-evaluate
  - End of year summary
  - Celebrate/Thank you!!
Goal Setting

- Steps
  > Evaluate current situation and resources
  > Assess needs
  > Seek input from largest group possible
  > Brainstorm
  > Determine priorities and objectives
  > Report how you did at the end of the year!
Example Goals

- Increase membership by 10%
- Improve room parent support with the implementation of a Shutterfly site for collaboration and idea sharing
- Increase male participation in PTA by adding a “Dad’s Club” program
Team Building

- **You** are not the team
- Your job is to empower the team - board members - and to build future leaders
- Recognize different work styles
- **Delegate** with authority
- Thank those who volunteer
- Have fun
Communication

• With Executive Board
  o Tell them what you need, in plenty of time (report template and due date)
  o Call to meeting (include reports)

• With Members
  o Meeting agenda, in plenty of time to add it to their calendar (include reports)

• With Principal
  o Monthly meeting
  o Opportunity to report at executive board/association meetings
Communication

- With Foundation
  - Calendar planning
  - Fundraiser planning
  - Sit on each other’s boards, or present at the meeting
  - Educate parents about the difference between PTA and Foundation – both are necessary!
Conflict Management

- Recognize the conflict
- Manage the conflict (do not fear; it can be healthy)
  - Often results in positive change
  - Keep the focus on the process and desired outcomes, not the personalities
  - Handle calmly, set goals
  - Agree to respect differences of opinion
  - Focus on the solution, not the problem
- Protect your neutrality so that you are seen as a fair and credible facilitator
REMEmBER, no one expects the president to be perfect...only poised and prepared to carry through. Executive board members should know parliamentary authority – and how to apply it – to help the president handle the uncomfortable situations.
Doing the Job

- Prepare—get training, read bylaws, Toolkit, check lists
- Attend Council Meetings— that will keep you on track
- Check-- check lists, websites, calendar, resources

- DELEGATE
- SUPPORT
- HAVE FUN!!
Celebrate a Job Well Done
Where do you look for help?

- Your bylaws first
- The Toolkit (www.capta.org)
- Insurance guide (https://knightinspta.com/, ID=ptausersCA, PWD=member2018)
- Unit Officers: Ask your President first
- Unit President: Ask your Council contact person (or President) first
Handouts

- Why PTA?
- Annual Checklist
- Be a Good President From the Start
- What Every PTA President Should Know
- Email Etiquette
- Sample Agenda
- Procedure Book Guideline
- Board Report Template
Palomar Council & 9th District PTA Resources

- 9th District Summer Leadership Conference (June)
- 9th District trainings & open houses
- Tax/Financial Help (council/district)
- Individual trouble shooting
- PC Leadership Team
- www.palomarcouncil.com
- www.ninthdistrictpta.org
California State PTA Resources

- California State PTA Toolkit (online)
- Bylaws for Local PTA/PTSA Units
- Leadership & Financial Kits
- Insurance & Loss Prevention Guide
- www.capta.org
National PTA Resources

- [www.pta.org](http://www.pta.org)
- PTA Newsletters
  - PTA Weekend Update
  - Advocacy Insider
  - Leader Briefing
  - Local Leader News
  - Our Children magazine
- One Voice blog ([onevoice.pta.org](http://onevoice.pta.org))
Questions?

Thank you for all you do!