



# ***WELCOME AND THANK YOU FOR JOINING US!***





# My Life As A PTA President



Leadership Development Presentation  
31<sup>st</sup> District President Training



# Workshop Overview

- The Power of PTA
  - Mission, resources, policies, bylaws
- PTA President – Key Roles
- PTA Planning – Getting Started
- Managing Your PTA – How To's



# Job Description

- <http://downloads.capta.org/toolkit/print/JobDescriptions.pdf>



# The Power of PTA

## 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



# 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 meeting



## Other assigned duties

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

# QUESTIONS?

California State

**PTA<sup>®</sup>**

*everychild.one voice.*

---

[www.capta.org](http://www.capta.org)



# Executive Board – Working Together



What is on a Board Meeting Agenda?



# ABC PTA

1234 Sunshine Way, Rainbow, CA 56789

Executive Board Meeting – October 18, 2015 (4pm-5pm)

## Call to Order

- Attendance
- Approval of Minutes
- Reports
  - Financial | President | Principal | Teacher Rep. |
  - Officers | Committee Chairmen
- Unfinished Business
- New Business
- Announcements

## Adjourn

California State

**PTA**<sup>®</sup>

*everychild.one voice.*

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



# Executive Board – Working Together

## 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.**



# Executive Board – Working Together

## 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

Bank  
Statements  
Assign non-check  
signer to review





# Executive Board – Working Together

## 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)



# Executive Board – Working Together

## Financial Mismanagement

- How To Handle
  - Report any suspected mismanagement to PTA District ASAP

Early Warning Signs  
What 'red flags' might you see?





# Executive Board – Working Together

## 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?

California State

**PTA<sup>®</sup>**

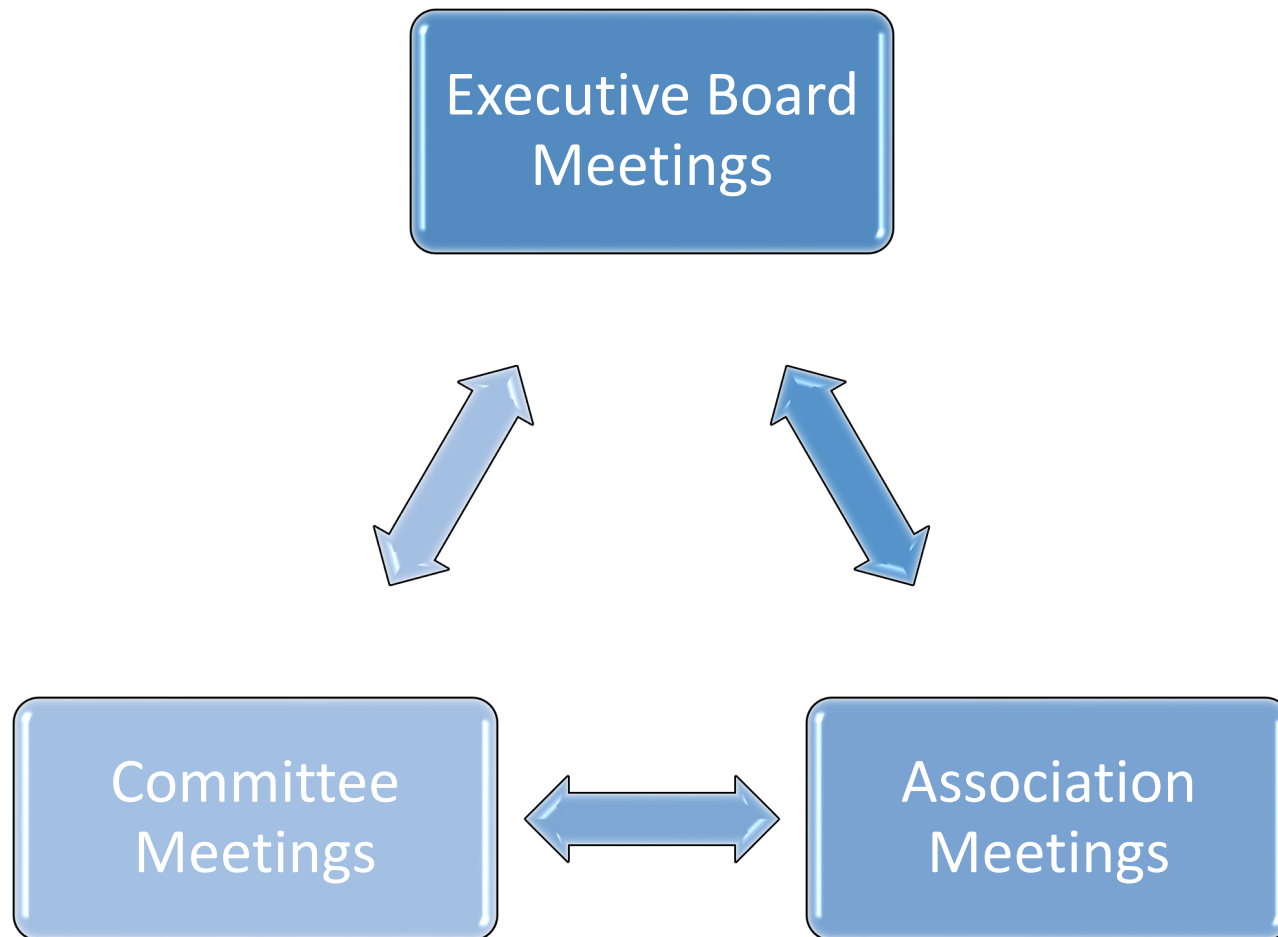
*everychild.one voice.*

---

[www.capta.org](http://www.capta.org)



# PTA Meetings





# PTA Meetings – How To's

## Before The Meeting

- RFA - Facility Use Permit
  - Advertise
  - Minutes
  - Agenda
- 
- Contact those who need to report





# Association Meetings

## Call to Order

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

*Sample Agenda*

## Adjourn



# PTA Meetings – How To's

## 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?

California State

**PTA<sup>®</sup>**

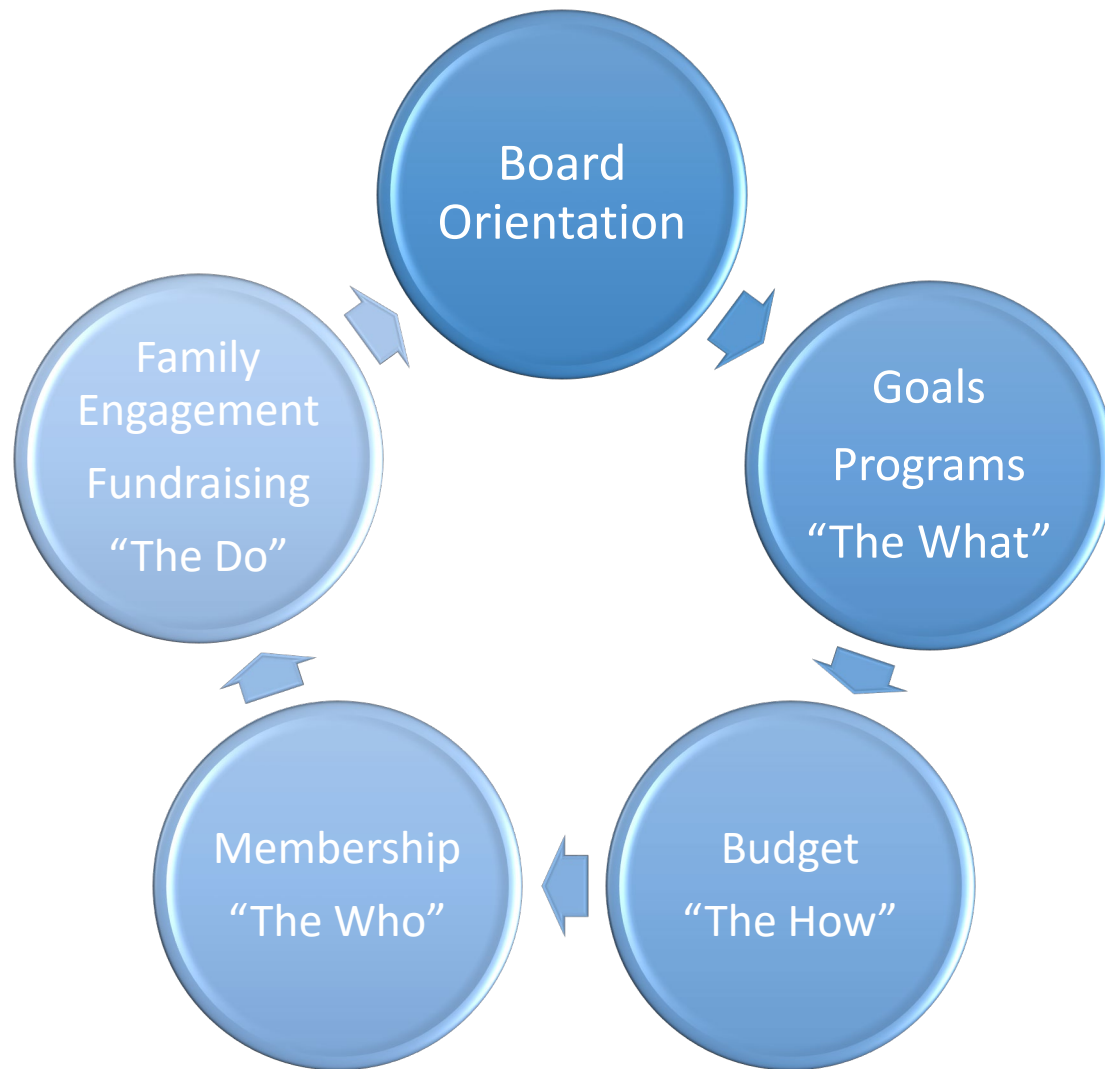
*everychild.one voice.*

---

[www.capta.org](http://www.capta.org)



# PTA Planning-5 Steps





# PTA Planning – Tips

## Board Orientation

Ground Rules  
Goals

Bylaws  
Insurance  
Guide

Procedure  
books

## Goals Programs ‘The What’

Community  
Needs

PTA Calendar

Timelines

## Budget ‘The How’

Board submits  
items

Income =  
Expenses

Preliminary  
Budget



## **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?

California State

**PTA**<sup>®</sup>

*everychild.one voice.*

---

[www.capta.org](http://www.capta.org)



# Managing Your PTA

## How to Work Smarter

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





# Managing Your PTA

## Goal Setting – Use SMART Goals

- Why is it important to set goals?





# 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?*

California State

**PTA**<sup>®</sup>

everychild.one voice.

[www.capta.org](http://www.capta.org)

# QUESTIONS?

California State

**PTA**<sup>®</sup>

*everychild.one voice.*

---

[www.capta.org](http://www.capta.org)

# THANK YOU FOR ATTENDING!

California State

**PTA<sup>®</sup>**

*everychild.one voice.*

---

[www.capta.org](http://www.capta.org)