

PRESIDENT

The role and responsibility of a PTA
President ...
Running your unit, managing the
finances and leading your people.

2017

Virginia
PTA[®]

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TABLE OF CONTENTS

President

- 1 PTA Basics and Your Role
- 2 Running Your PTA Unit
- 3 Leadership
- 4 Networking Activity
- 5 Resources

PTA BASICS AND YOUR ROLE



Your Role as PTA President

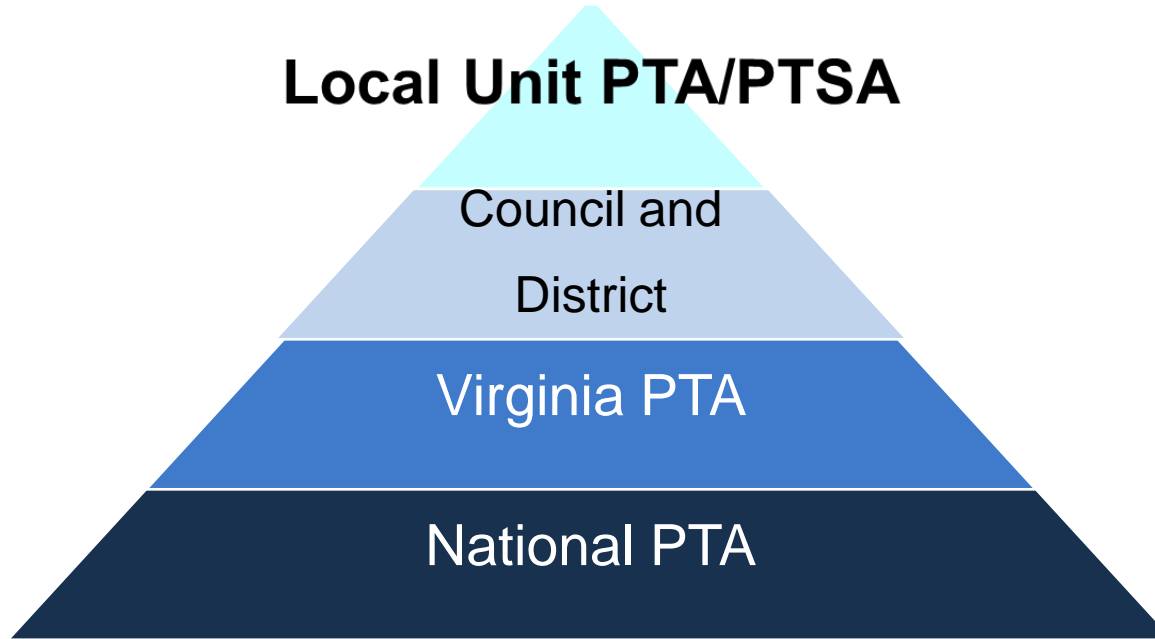
- **Lead the PTA**
- **Preside over meetings**
- **Represent the PTA**
- **Administer the business of the PTA – financial and legal obligations**
- **Maintain communications with your members**
- **Foster relationships**

Our Parent Teacher Association

PTA Mission: To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

- PTA is the #1 voice for parent involvement. Children succeed when families, schools and communities work together.
- You are not alone – you are supported by real people who will help you do your job.
- We are advocates for all children ... you are working as an advocate for all of the students in your school!
- PTAs are 501c(3) charitable, non-profit organizations

Our PTA Family



YOUR PEOPLE AND THEIR ROLE

Executive Committee: Consists of elected officers and principal. Sets PTA goals, calendar, appoints committee chairs.

Executive Board: Consists of your executive committee and committee chairs. May approve new committees and members. Board members support the majority decisions.

General Membership: All of your members (including the above groups). Adopts your audit and any bylaws revisions. Approves your budget. Elects your officers.



BYLAWS ... THE “LAWS” FOR YOUR PTA

- Read them ... really! Be familiar!
- Bylaws explain how your unit functions
- Bylaws are adopted by your membership and revised every five years
- The revision process allows you to ensure they fit your unit. If you see a # sign, that means you cannot change that section.

Full info on www.vapta.org

Standing Rules

- Standing Rules are usually written for your Executive Board. These are like “classroom rules” that explain the details of how your Board operates.
- Having standing rules in place – and communicating and following them – can help avoid conflict and allow your PTA to run smoothly.
- They cannot conflict with your bylaws.
- Don’t have them, or need to revise them? Form a committee of three and use the Standing Rules info in our Training Library.

RUNNING YOUR PTA UNIT



Transition Steps

- **Meet with outgoing leaders - review records, materials, procedure books**
- **Complete the “Officer Update Form” on www.vapta.org. Update bank signature cards.**
- **Arrange meetings with contacts, partners**
- **Introduce new leadership to members at BTS events**

Your Boards First Steps – the big picture

Set Your Goals – what do you want to accomplish this year as a PTA?

- What programs, events or projects has your PTA done in the past?
Does your board have new ideas?
- Decide what committees you will need to make these events happen.

Draft Your Budget – what money will you need to accomplish those goals?

Set your Calendar – work with your Board and principal

THE PTA MEETING

- Carefully plan each meeting – use our tools!!
- Make meeting announcements early and often
- Develop a solid agenda and stick to it!
- Start and end on time
- Follow up with posting minutes



“Good Standing” – What??

- Officer Update Form completed online
- Membership Dues paid by December 1st
- Bylaws current (revised every 5 years)
- Audit completed every year and copy sent to Virginia PTA
- IRS 990 completed every year and the email confirmation sent to Virginia PTA

“Treasurer 101 for Presidents”

Work closely with your treasurer to ensure that:

- A Treasurer’s Report is presented at every meeting.
- Bank statements are reviewed and verified against the Treasurer's Report every month by a non-signer; bank statements are reconciled every month by the treasurer.
- Cash is counted by two people, deposits are made the same day
- All checks are signed by 2 people and include full documentation of the expense before being written. NEVER sign a blank check!!
- Your budget is being followed and kept up-to-date with actual expenses and income. Any amendments to your budget over \$300 must be approved by your general membership.

Ask questions!!!

LEGAL OBLIGATIONS

- Make sure your PTA has insurance.
- Your treasurer records must be audited every year, and then your audit is adopted by your general membership.
- Ensure IRS 990 is filed at correct time.
- Sign all contracts once approved by membership.
- Remember, this is your member's money – and we are the stewards of that money!

LEADERSHIP



It's All About Communication!

- Develop strong communication channels with your Board – email, phone calls, texts ...keep everyone in the loop.
- Share your PTA meetings and events with your school community!
- Remind all of your people of PTA events ... folks need that in our busy society!

Your Are the Face of Your PTA!

- Meetings with your principal
- School events
- School Board meetings
- Contacts with elected officials
- Attending PTA Day at the General Assembly
- At Council, District, State and National PTA

Building Relationships Builds Your Leadership

- Principal: Should be a working team! Respect confidentiality and always share meeting preparations.
- Teachers: seek input, share common goals
- Community: joint projects, grants
- Your school board, superintendent and elected officials: yes, you can talk to them too!!



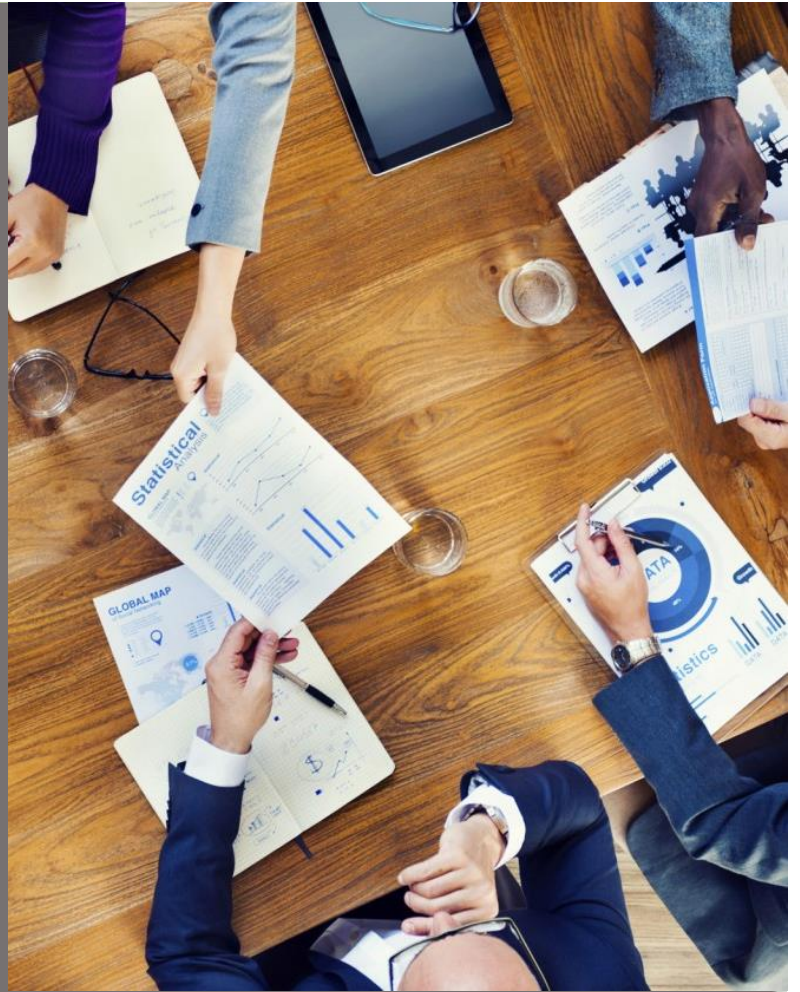
Leadership Essentials

- Prioritize and delegate while maintaining oversight. Use your Board - they are your team!
- Communicate effectively - clearly outline your expectations.
- Provide support and encouragement to your team.
- Pay attention to the numbers - membership and money!!
- Troubleshoot tough problems and own your mistakes.
- Learn from experience.
- When in doubt, ask yourself this guiding question: "Is this what is best for the children in our school?"

NETWORKING ACTIVITY



RESOURCES



NATIONAL PTA RESOURCES

www.pta.org

- PTA Program Info
- E-learning Courses (President, Treasurer, Board Basics)

www.ptakit.org

“Back-to-School Kit” with sections for every part of your PTA boards work (President and Board, Finance)

- PTA President Quick Reference Guide

VIRGINIA PTA RESOURCES

www.vapta.org

Quick Links for forms

Home page for news

PTA Leaders Training Library:

- “Leadership Toolkit”
- “Support for Your PTA”

Financial Resources:

- Treasurer’s Month to Month Checklist
- Audit Instructions and Report
- Treasurer page under PTA Leaders – Training Library

Resources Summary

www.vapta.org our
Virginia PTA website

info@vapta.org our
Virginia PTA office

Council PTA

District PTA

Virginia PTA Board of
Managers

www.pta.org
National PTA website
and
www.ptakit.org
Back-to-School Kit

THANK YOU
