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Welcome

Welcome to PTA® leadership! Thank you for volunteering your time to lead your PTA®. You are in a great position to help children and families succeed! We welcome you to the PTA® family.

As a PTA® leader, you will focus your community on the needs of your members and their children. Your leadership will motivate volunteers and persuade local decision makers. You and your team will communicate with teachers and administrators, collaborate with community partners and associations, raise funds and awareness, provide much-needed programs for students and families, encourage reading and the arts, and much, much more. Because you are a part of PTA® leadership, you become part of the rich history of PTA®, an association with more than 115 years of experience helping children succeed.

Because of you and your fellow PTA® members, the children and schools of your community will be more successful.

Why lead a PTA? Because...

- PTA® is the number one voice for parent involvement.
- Children succeed when families, schools, and communities work together. PTA® helps develop those relationships through resources, programs, and advocacy.
- You are not alone. PTA® is a network of trained and passionate volunteers just like you, ready to assist you when you need help.
- You are part of a powerful voice for all children, working with like-minded people around the country and the world to improve the education and well-being of our youth.
- You are supported by real people who will connect you to information about children and education you can use today.
- PTA® makes a big difference by influencing the decisions of legislators and leaders of other organizations—and PTA® works with parents locally to ensure proper funding, leadership, and instruction for all schools and school districts.
- You can be a role model to your children and your community!

Thank you for all you do. We hope this PTA® President's Quick-Reference Guide will be a useful tool as you lead your PTA®.

Overview

You and your PTA members have many tools from which to choose. Every person who joins a local PTA automatically becomes a member of both his or her state PTA and the National PTA and receives support from a national network of peers.

The following partial list of resources for leaders will help you make the most of your PTA year. **Please be sure to visit PTA.org for a more complete selection of leadership resources.**

Find additional electronic resources at PTA.org/Officialkit
National PTA's home on the Web is PTA.org.

Build your skills: Take free online courses, at PTA.org/e-learning.

Tap into the latest resources and info: Subscribe to National PTA's e-newsletters: **PTA Local Leader News, The PTA Parent, and PTA Takes Action Update.** PTA.org/enewscentral

Find great project ideas: Visit the **PTA Great Idea Bank** at PTAgreatideabank.org. Search for ideas, discuss membership campaigns, and trade PTA management tips with fellow leaders and members. There is a wealth of knowledge to be shared!

Learn how and why PTA speaks for children: Visit PTA.org/advocacy to connect federal education policy info and resources. Get what you need to launch an advocacy program or campaign in your community.

Grow and retain your members and volunteers: Membership Marketing Templates and Tools are available to local unit presidents and membership chairs to aid and enhance membership recruitment and retention activities. These resources are available online at PTA.org/marketing.

National PTA programs help your school community increase family engagement and support the educational success, health, and well-being of children. Learn more at PTA.org/programs.

Printed Resources

- Our Children magazine, loaded with great information on running your PTA, parenting, and more, is published five times a year. Look for your issue each August, October, December, February, and April. All local units receive a free copy. Consider purchasing additional subscriptions for your board or school library (order at PTA.org/ourchildren).
- The Official PTA Back to School Kit is jam-packed with resources, member benefits, and PTA Quick-Reference Guides like this one to help you kick off your school year, engage families, and manage your PTA throughout the year. Many of the Kit's resources are also available online at PTA.org/officialkit

National PTA Convention

Attend the National PTA Convention, held each June, to develop your leadership skills, network with PTA and school leaders, and vote on PTA business. The annual National PTA convention includes workshops, featured speakers, award presentations, an exhibit hall, and special events.

Getting Your PTA's Year Started

Getting Your PTA's Year Started

Your Development as a PTA Leader

This PTA President's Quick-Reference Guide was created to help you effectively lead a board of directors who:

- Sustain and increase a diverse and inclusive membership
- Work collaboratively with school staff, community organizations, and individuals who care about children, families, and education
- Conduct programs that encourage all parents to be involved in children's education
- Keep parents and community informed about student achievement, as well as student health and well-being
- Organize actions to address student achievement, health, and well-being
- Develop PTA unit leadership for the future

Contact Us

Contact the National PTA Information Center at (800) 307-4PTA (4782) or e-mail info@PTA.org.

Visit: ***PTA.org***

The PTA Mission

Our Purpose

- 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 build close relationships between home and school so that parents and teachers may cooperate in the education of children and youth.
- To develop united efforts between educators and the general public to secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

National PTA comprises millions of families, students, teachers, administrators, and business and community leaders devoted to the educational success of children and the promotion of family engagement in schools.

Spread the Word About PTA

Frequently Asked Questions About PTA

The PTA difference is directly related to the quality of the association, its mission, its history, and its national network of resources. Local PTA leaders have access to ideas and help from other PTAs across the nation. Most PTAs are registered nonprofit 501(c)(3) nonprofit associations run by volunteers. PTAs receive benefits that include family, student, and school-focused programs; training; guidance in starting and running a nonprofit organization; and materials for use in local units and schools.

What Does It Mean to Be a PTA?

- PTAs benefit everyone. Strong schools mean stronger communities. PTA membership is open to anyone who wants to be involved and make a difference for the education, health, and welfare of children and youth.
- PTAs improve children's well-being. PTAs focus on what students need to be successful in their learning, including proper nutrition, safety, and healthy environments.
- PTAs keep parents informed. Involved parents can understand the challenges schools face and become part of the solution. PTAs support education through active participation and advocacy. PTAs help parents navigate the local educational system to become effective advocates for their children.
- PTAs help schools fulfill parent involvement requirements mandated by the Elementary and Secondary Education Act–No Child Left Behind Act (ESEA–NCLB). Why? Because PTA's definition of parent involvement is the definition used in ESEA–NCLB. Getting involved in PTA is the best way to utilize parent involvement. More than 85 rigorous research studies conducted over 40 years show that kids do better when parents are involved. Grades are higher. Test scores improve. Attendance increases.
- Every PTA unit selects its own programs and activities. While National PTA creates many successful programs for local units to use, there are no required programs.
- PTAs are independent of school systems yet collaborate in their local communities with administrators, lawmakers, and community-based organizations. They can make the decisions that will best serve their needs.

Basic Policies PTA

The following are basic policies of National PTA:

- The organization shall be noncommercial, nonsectarian, and nonpartisan.
- The organization shall work with the schools and community to provide quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- The organization shall work to promote the health and welfare of children and youth and shall seek to promote collaboration among parents, schools, and the community at large.
- No part of the net earnings of the organization shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers, or other private persons except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the purposes of PTA.
- Notwithstanding any other provision of these articles, the organization shall not carry on any other activities not permitted to be carried on (i) by an organization exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.
- Upon the dissolution of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of National PTA.
- The organization or members in their official capacities shall not, directly or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office, or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

Overview

The PTA local unit is connected to its state PTA and to National PTA, forming a nationwide network of members working on behalf of all children and youth. We are all one association—sharing and working in local communities, regionally, at the state level, and at the federal level—with the same overall goal of student success.

Local PTA/PTSA

At the local level, Parent Teacher Associations (PTAs) and Parent-Teacher-Student Associations (PTSAs) form a nationwide network of members striving to meet the needs of children and youth in their own communities.

Regional/Council/District PTA

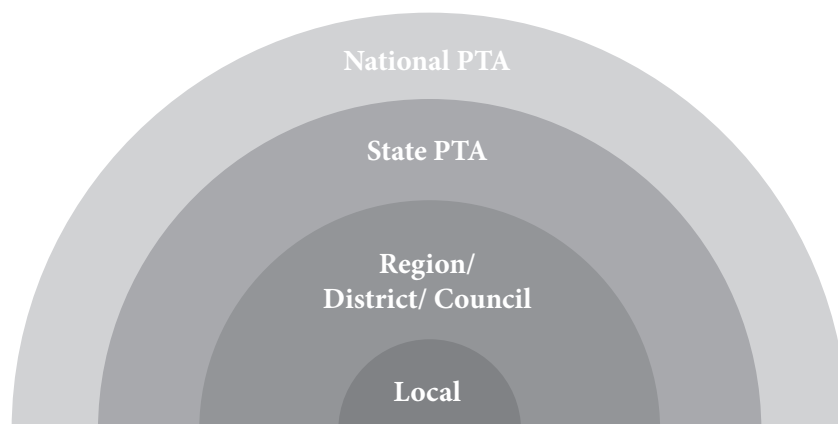
Nearly 1,000 council, district, and/or regional-level PTAs assist with efforts of local PTAs. Each state determines its own structure to best meet the needs of its units; therefore, states may have different council/district/ regional groupings.

State PTA

Local PTAs receive support and field service through 55 congresses representing all 50 states, the District of Columbia, the U.S. Virgin Islands, Puerto Rico, and Department of Defense Dependents Schools (DoDDS) in Europe and the Pacific.

National PTA

The national association is a powerful voice for all children, with members working on behalf of the nation's youth, schools, and communities through effective advocacy, strategic alliances, educational programs, support, and parent resources.

**Organizational Structure of PTA**

Running a PTA

Your Role as a PTA President

Overview

Whether you are leading a PTA, serving an individual school, a district, or a community, the role of PTA president is a very rewarding one. Your unit will look to you for guidance in creating partnerships within your school community and fostering an environment where parent involvement is encouraged and respected. You will learn a great deal and put your talents and knowledge to use as a leader in your school community.

You will play a lead role in:

- Unit organization
- Meetings
- Inclusiveness
- Elections
- Programs
- Member training
- Finances

You will use your skills to:

- Organize: plan and set priorities
- Recruit, manage, motivate and retain volunteers.
- Welcome a diverse and inclusive group of members, volunteers, and leaders
- Run effective programs
- Manage money, raise funds
- Run effective meetings
- Ensure all voices are heard through effective use of parliamentary procedure
- Advocate on behalf of students
- Transition to the next leadership team by nurturing potential leaders and preparing the incoming team

First steps as PTA President

As a new PTA president, you should immediately:

First, introduce yourself and set a tone of cordial collaboration:

- Contact your state PTA. They are there to help. Provide the State PTA the names and contact information for you and your officers.
 - Ask who you call if you have any questions.
 - Ask if any training is scheduled in the near future that can help get you and your board off to a good start.

- Talk to with the outgoing president and officers. What worked last year? What did not work last year? Thank them for their work.
- If yours is a school-based unit, introduce yourself to the school staff and principal. Ask about their plans for the year and tell them you are interested in helping them achieve their goals.
- If yours is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
- Next, review your files and determine what your next organizational steps will be:
- Review your “procedure 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 and what is expected of you.
- Read your unit’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 may be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA.
- Find 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. You will want to start afresh with a new set of books, so be sure the previous set is closed out and audited.
- If your unit is a 501(c)(3) nonprofit (and most are), find the most recent Form 990 filing. Again, your treasurer may be able to help. All nonprofits must file some type of Form 990 with the IRS each year. Be sure you know when a 990 was last filed and what you will be responsible to file in the coming months. 990s are due on the 15th day of the fifth month following the end of a fiscal year.
- If it has not yet been done, change the signatures on your PTA’s bank accounts. You will want to be sure previous officers no longer have access to your PTAs accounts.

Take a deep breath:

You are about to enter one of the most rewarding yet challenging times of your life. Remember to ask questions and use the support available from your state PTA and from National PTA. We are in this together. And, together we can make a difference for children and families.

General Board Information:

While presidents have specific powers delegated to them through bylaws and policies, your chief role is to help guide your board. The board of directors is the core team responsible for meeting your PTA’s goals and fulfilling PTA’s mission. A well-running, informed board makes a president’s job a lot easier.

Most boards have at least four officers: a president, a vice president, a treasurer and a secretary. Your board may also contain chairs of standing committees, such as a membership chair, Reflections Chair, Legislation Chair, etc. Check your unit’s bylaws to find out what structure you should have in place. Together the entire board works as a team to reach PTA’s goals.

TIP: For a smooth running board, be sure to share this board section with your PTA’s board members.

Running a PTA

Tips for a well-functioning board:

- Hold an orientation. Make sure all board members know their legal and ethical responsibilities and that each member has a job description.
- If you are a school-based unit, consider having a staff or teacher liaison position on your board.
- Plan for rotation and transition. Boards grow stronger when they consistently recruit new members and leaders. Make sure there are clear begin and end dates for all board positions. Start planning early in each term for a smooth transition at the end of the term—and that means saving reports, files, and notes.
- Set goals. The board should have overall goals for the year that are in line with PTA's mission. Each committee should also have a goal that fits into an overall PTA strategy.
- Evaluate the work of the board. Are you meeting the needs of your community? Consider doing a survey and asking for input.
- Boards should self-evaluate regularly. Are board members committed? Does your board have the information and experience it needs to get work done? A sample board assessment is included in this guide.
- Does your board communicate? The board governs as a team. If information isn't flowing among PTA leaders, the board is not effective. Good Presidents help facilitate communication.

Basic Board Responsibilities:

The fundamental role of the board is to govern. PTA is a member-driven association. Members delegate power through bylaws. Much of the day-to-day work of a PTA is done by its boards. Boards are entrusted with the PTA's work by the members.

Although some responsibility can be delegated to officers or committees, ultimately it is the board of directors that is responsible for the PTA. As stewards, the board has specific legal responsibilities. Those responsibilities fall on the board as a whole—as a team—although every individual board member is still responsible for ensuring the board fulfills its duties. Board duties include:

- The **Duty of Care** requires board members to be reasonably informed about what the PTA does, to participate in decision-making, and to act in good faith. Board members are expected to use good business judgment when making decisions and protecting PTA's assets. Your PTA's primary asset is its name and reputation. Do board members:
 - Read minutes and background materials to support their decisions?
 - Attend meetings, ask questions, and participate in discussions?
- The **Duty of Loyalty** requires board members to act in the best interest of the association. Board members should not make decisions based on whether or not they or their family will benefit but, instead, on what is best for the PTA. They should not share confidential information. All PTAs should have a Conflict of Interest Policy, and a sample of that policy follows. Do board members:
 - Disclose if they or their families stand to gain financially by a decision?
 - Abstain from voting and from sharing "insider information" if they have a close personal interest in the results of the decision?

- The ***Duty of Obedience*** requires board members to comply with all local, state, and federal laws. If your PTA is a 501(c)(3) nonprofit, your board must follow IRS regulations and file proper annual IRS reports. Board members' actions must also comply with PTA's mission and purpose, and board members must obey their PTA's bylaws. Do board members:
 - Ask how new projects and expenditures will fulfill PTA's mission? Ask if the project or expenditure is appropriate for a nonprofit?
 - Have a copy and refer to your unit's bylaws? When appropriate, move to revise those bylaws? Know the current state and national bylaw content?

Running a PTA

Basic Board Evaluation	Yes	No
I have the training, knowledge, and resources I need to be a board member and fulfill my responsibilities.	☐	☐
I regularly attend board meetings and participate in those meetings.	☐	☐
I have read and understand my PTA's bylaws.	☐	☐
I have a PTA job description.	☐	☐
I have signed a Conflict of Interest Policy.	☐	☐
I know and understand the PTA mission.	☐	☐
I effectively represent my PTA to the community.	☐	☐
I am an advocate for PTA and for the children and families of my community.	☐	☐
My board creates plans, then regularly monitors and evaluates progress toward meeting our goals.	☐	☐
My board sets fundraising goals to support our plan of work.	☐	☐
My board receives regular financial reports.	☐	☐
My board is welcoming to newcomers.	☐	☐
My board conducts and participates in regular training and skill-building.	☐	☐
My board regularly recruits and prepares new board members.	☐	☐
My board bases decisions on PTA's mission.	☐	☐
Board members are actively involved in decision-making and planning.	☐	☐
Board members are encouraged to participate in discussion during meetings.	☐	☐
Board members come to meetings prepared and on time.	☐	☐
Board members see themselves as part of a team.	☐	☐
Board members are respectful toward each other.	☐	☐
Board members act as advocates for their PTA.	☐	☐
Board meetings are effective and results-oriented.	☐	☐
Board meeting dates are regularly scheduled and planned in advance.	☐	☐
Board meetings are not dominated by one person.	☐	☐
Board meetings are orderly and are completed in a reasonable amount of time.	☐	☐

_____ % of the board know PTA's mission.
 _____ % of the board fulfill their commitments to PTA
 _____ % of the board attend meetings
 _____ % of the board are active on committees.
 _____ % of the board recruit new volunteers and leaders.
 _____ % of the board attend most PTA events.
 _____ % of the board are effective child and family advocates.

Basic Responsibilities of the Officers***Vice President***

The vice president may be called upon at any time to temporarily assume the place of the president; therefore, he or she should study the president's duties and responsibilities and be familiar with the work of the PTA. In the event of the president's resignation, the vice president assumes all duties until the president's position is filled in accordance with the bylaws.

The vice president is responsible for:

- Performing specific duties as provided for in the bylaws
- Assuming responsibility for duties designated by the president
- Representing the president in his or her absence or upon request

Secretary

The secretary is responsible for keeping an accurate record of the proceedings of association meetings. These records are the permanent history of the PTA. Promptness, accuracy, and knowledge of PTA policies are key to this job. The secretary should be committed to helping the president conduct a businesslike meeting.

- Recording minutes of PTA meetings, with special attention given to motions (recorded exactly as stated) and action taken
- Keeping secure official, permanent PTA records, including all originals of approved minutes
- Maintaining a copy of current bylaws and standing rules, as well as the membership list

The secretary should have these items on hand at all meetings:

- Minutes of the previous meeting
- Copies of the previous treasurer's report
- List of unfinished business to be discussed
- Agenda
- Current bylaws and standing rules
- Current membership list
- List of committee chairs
- Materials for note/minute taking

The secretary also may be given the responsibility of maintaining all PTA correspondence, including incoming and outgoing communications with members and notifications for all meetings. It is common for a local unit to designate these responsibilities to a corresponding secretary.

Running a PTA

Treasurer

The incoming treasurer should discuss with the former treasurer the status of current fundraising activities, what money is available to be spent versus what is owed, and the bylaws as they relate to the treasurer's responsibilities.

The treasurer is responsible for:

- Ensuring that the PTA's financial records are reviewed according to the bylaws before assuming duties
- Having three authorized signatures on file at the bank for financial transactions,
- including those of the president, treasurer, and one other officer as an alternate (no two check signers should be from the same household)
- Obtaining two authorized signatures on every check
- Collecting all money from persons delegated to collect or to raise funds during a local unit activity, and providing a written receipt for those funds
- Depositing all money in the name of the local unit in a bank account approved by the board
- Maintaining an accurate record of all receipts and disbursements
- Obtaining authorization from the board before writing a check or spending money
- Remitting, by check, all authorized bills and statements as prescribed in the bylaws
- Submitting a written financial statement at each board meeting and at each general membership meeting
- Chairing the Budget Committee and preparing the annual budget as prescribed in bylaws
- Reporting income and expenses as compared with the budget
- Preparing an annual report to be used to review PTA financial records
- If your unit is a 501(c)(3), ensure the filing of the PTA's 990 report to the IRS.

The PTA Money Matters Quick-Reference Guide, available at PTA.org/MoneyQRG, will help orient the treasurer to his or her main areas of responsibility.

PTA Committees***Types of Committees***

Presidents should never do it all. Committees are a way to share the work. Sometimes bylaws define committee structure, but your board may want to establish additional committees. Committees plan and promote the activities of the local unit. Committees are designated in two ways:

1. Standing committees are permanent. These committees conduct business year-round.
2. Special committees conduct specific business on an ad hoc (as-needed) basis. These committees dissolve when the business they were charged to do is complete.

A committee begins with a plan of work for the year that includes goals, action steps, timelines, and an evaluation for each activity. A plan of work form can be found on page 31.

A committee consists of three or more persons who have been appointed or elected on the basis of their qualifications. A definite purpose is established for each committee, and committee actions are subject to the control and direction of the association.

Since all committees have power to do only that which they are instructed to do, they should receive such instruction from the group by which they have been created (which is often the board of directors)

Committee Chairs

Committee chairs are responsible for the actions and activities of the PTA, including planning, communication, and receiving board or membership approval.

General committee chair responsibilities include:

- Providing notice of all meetings to all committee members, including the PTA president
- Working closely with other committee chairs (possibly combining efforts) so duplication will be avoided and programs and projects will be strengthened by new ideas and manpower
- Preparing committee reports for board meetings
- Seeking member and board approval before taking any action (including distribution of public notices)

Local PTA Goals for the Year

Overview

An effective PTA:

- Conducts at least one program or project that provides an opportunity for parents to be involved in the school.
- Conducts at least one program or project that increases awareness among parents about issues that affect student achievement or school success.
- Conducts at least one program or project to bring the school, parents, and the community into closer relationship.
- Attends the state PTA convention or other state PTA-sponsored events.
- Sustains and increases its membership.
- If a school-based PTA, conducts at least one planning meeting with teachers and principal.

Creating Goals Step by Step

1. Assess the needs of your school community by communicating with the principal and teachers. Conduct a survey of all parents to find out what they want and need, as well as who they are. If you are a community-based PTA, identify potential collaborators and conduct a survey of community needs. Invite all involved to join PTA. A sample needs assessment survey and scoring guide is available on the following pages.
2. Develop objectives for actions based on the results of your needs assessment.
3. Propose your plan for meeting the objectives at a PTA meeting. Invite all school staff, parents, and appropriate community members to attend.
4. Vote on the adoption of the plan and incorporate your PTA's goals into your annual calendar.
5. Create a plan to raise funds to support your plan of work and achieve your goals.

Review the free e-learning course [Running a Successful Program at PTA.org/e-learning](http://PTA.org/e-learning) to help you determine what programs will help you meet your objectives.

Local PTA Goals for the Year

Sample Needs Assessment Survey

ABC PTA needs your help. To provide you with the types of programs and services you need and want, ABC PTA asks you to complete the following survey. Your answers will help us help you and your child. Please fill in or circle your answers, as appropriate.

1. Please fill in the grade of each child you have in school. _____

2. Are you a member of ABC PTA?

A Yes B No

3. Please rank the following in order of importance to you: (1 = most important, 11 = least important)

___ Safety and security when my child is at school

___ Healthy food choices for my child at school

___ Resources on parenting

___ Physical education or activities for my child at school

___ Arts education for my child at school

___ Improving my child's academic success

___ Opportunities to be involved at school

___ Opportunities to interact with other parents and families

___ Effective parent-teacher communication

___ Adequate funds for my child's school

Local PTA Goals for the Year

____Other (please specify _____)

4. If ABC PTA announced it would act on the area of most importance to you, how likely would you be to get involved?

A Very likely

B Somewhat likely

C Somewhat unlikely

D Very unlikely

5. Overall, how satisfied are you with how ABC PTA serves your school?

A Very satisfied

B Somewhat satisfied

C Somewhat dissatisfied

D Very dissatisfied

6. In your opinion, what are the strengths of ABC PTA? What successful things can it build on?

7. In your opinion, what are the weaknesses of ABC PTA? What challenging things can it improve on?

8. Please add any other comments you might have on ABC PTA and your school.

Please complete and return this survey by (date), to (person's name) at (address or drop-off location).

Thank you for participating in this survey!

Local PTA Goals for the Year

How to Use your Needs Assessment Survey, Question 3

Survey Choices	Possible Program Choices(s)
Safety and security when my child is at school	Bullying prevention, PTA's Connect for Respect program (PTA.org/bullying)
Healthy food choices for my child at school	Nutrition and portion control, consider running a Healthy Lifestyles event (PTA.org/topic_nutrition.asp)
Resources on parenting	Talking to your child about tough subjects, program on PTA's Standards for Family Engagement resources. Consider creating a Parent Resource Center in your school.
Physical education or activities for my child at school	Obesity prevention, consider running a Healthy Lifestyles event (PTA.org/topic_health_and_wellness.asp)
Arts education for my child at school	Music , the arts, craft nights. Consider implementing a Reflections Program. (PTA.org/Reflections)
Improving my child's academic success	Helping children develop good study habits
Opportunities to be involved at school	Volunteer training and opportunities
Opportunities to interact with other parents and families	Pizza night, Bingo Night, Game Night, Movie Night, or other family night events
Effective parent-teacher communication	Parent / teacher/principal get-together, parent-teacher conference basics
Adequate funds for my child's school	Advocacy workshop on education budgets; fundraisers for PTA projects and activities

Partnering with Principals and Teachers

Overview

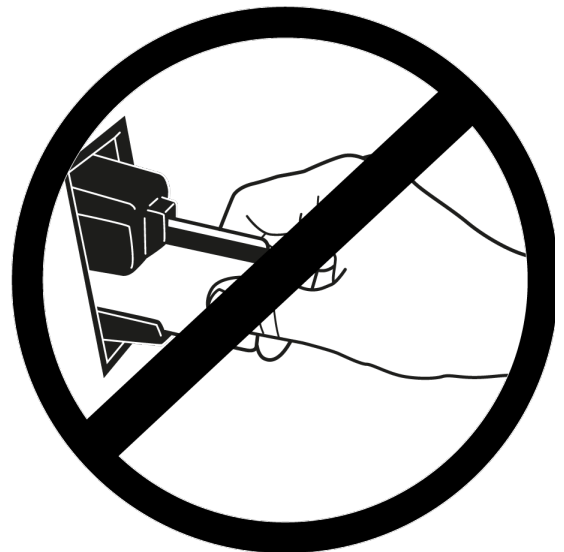
While PTA is an independent association and some PTAs exist outside of school buildings, the majority of PTAs serve one or more schools. However, the most effective school-based PTAs partner with teachers and administrators to accomplish their goals. A good working relationship between school staff and PTA leaders can lead to a great learning environment for students and families.

Suggestions for Partnering with Principals:

- Send a strong message of support. Ask principals what their overall goals are for the year. Ask how you can more effectively involve parents and community to support those goals.
- Connect your principal to state and National PTA resources. Help your principal understand that your local unit is a separate and independent child advocacy group, part of and supported by a large and experienced association. Ask your principal for suggestions on how to take advantage of PTA resources, programs, and grants.
- Arrange for regular meetings with your principal. PTA Presidents and school principals need to help each other achieve goals. Try a regular monthly coffee or lunch, or arrange a regular phone call.
- Ask your principal to provide a regular report at PTA meetings. You may want to plan the content together.
- Do not be adversarial. Try your best to work with your principal, even if he or she is difficult. Developing a working relationship is well worth the effort.

Suggestions for Partnering with Teachers:

- Ask to speak at a teachers meeting to introduce who you are and ask for input. Ask for permission to post PTA materials in the teachers' lounge. Provide a feedback box in the teachers' lounge.
- Approach all teachers in a spirit of cooperation. How can your PTA work with teachers to achieve common goals? How can you and your board support learning in the classroom and beyond? How can you get parents and the community involved in helping teachers reach their goals?
- Invite teachers to join your PTA. Ask them to attend meetings and provide input.
- Let teachers know your PTA values them. A good working relationship between home and school is essential to student success. Tell your teachers you are there to help build that relationship.



TIP: Your PTA is not an ATM. Develop relationships and partnerships with teachers and administrators. Work together to achieve goals, not buy items. PTAs can do more than just raise funds. Create powerful partnerships to support student success.

Partnering with Principals and Teachers

Key Terms: School Administration

Here are some key terms to know when speaking with principals and teachers about education policies:

- Elementary and Secondary Education Act–No Child Left Behind Act (ESEA–NCLB)— National legislation intended to raise the academic achievement level of all children.
- Adequate yearly progress (AYP) —An incremental measure of annual progress toward proficiency in grade levels.
- Performance standards— Progress a student is expected to make by the end of a particular grade.
- Highly qualified teacher—A teacher who has obtained full state teacher certification or has passed the state teacher licensing exam, holds a minimum of a bachelor's degree, and has a demonstrated subject-area competence.
- Disaggregated data—Test results sorted according to special student-population characteristics, including economic disadvantage, race, ethnic groups, physical disabilities, and limited English fluency.
- Local education agency (LEA)—A public board of education or other public authority within a state that maintains administrative control of public schools in a city, county, township, school district, or other political subdivision of a state.
- State education agency (SEA)—A public board of education or other public authority that is responsible primarily for the supervision of a state's public schools.
- Parental Information and Resource Centers (PIRCs)—Statewide centers that provide capacity-building to schools, LEAs, and SEAs to implement effective parent engagement policies, programs, and activities that raise student academic achievement and strengthen partnerships among families and schools.
- Supplemental services—Tutoring or academic assistance provided at school districts' expense to students from low-income families who have been identified as failing for two years.
- Proficiency—Mastery of an appropriate grade-level task.

Community Partnership Tips

It is crucial that you know the demographics of your community and its key decision makers so that you can target community needs and reach people who can make things happen. Also, get to know other community groups so that you can work together. Cooperation with the community will make your PTA a strong, key player inside and outside the school. PTAs are strongly encouraged to partner with other community groups. Consider a joint project or program that can benefit children and families.

State and National Contacts

Overview

As you begin your year as PTA president, you will encounter situations in which you feel unsure of the “right” answer. Remember that you are part of a national network, all members of which share the same mission. Someone will be available to help you by phone, e-mail, or in person. Just ask!

Contact Us

First, consider contacting your state PTA. People are available to guide you in matters that are unique to your area and can provide valuable resources to help you fulfill your responsibilities.

In addition, you are always encouraged to send comments or questions to National PTA. Information Center representatives will respond directly to your question or forward your inquiry to the appropriate person at the National PTA office or your state PTA for response.

Find a web directory of all PTA state offices at PTA.org/States

National PTA
1250 N. Pitt Street
Alexandria, VA 22314
Toll-Free: (800) 307-4PTA (4782) E-mail: info@PTA.org
Website: PTA.org

Additional Support Resources

You can connect with National PTA and other PTA leaders through:

- PTA Great Idea Bank (PTAgreatideabank.org)—Updated regularly with successful ideas used by some local units.
- Facebook (Facebook.com/ParentTeacherAssociation)—“Become a fan” of the Parent Teacher Association on Facebook to get updates and connect with other fans.
- Twitter (Twitter.com/NationalPTA)—Follow @NationalPTA on Twitter for updates on education-related issues and PTA efforts.
- National PTA messages—Hear more from National PTA through the PTA Blog (PTA.org/Blog), PTA Radio (PTA.org/PTAradio) and National PTA’s YouTube channel (YouTube.com/nationalpta).
- Fotki (Fotki.com/pta)—See pictures from PTA events nationwide.

Many state and local PTAs, and PTA members, can also be found on Facebook, Twitter, and other social media. Get connected.

Local Contacts

Complete the grid on the following page and share it with your PTA board and the school staff. Do not forget to write the name of your PTA at the top of the grid before making copies.

Local PTA Contacts

Contact list for _____

Your Board	Name	Phone	E-Mail	Address
PTA President				
PTA Vice President				
PTA Secretary				
PTA Treasurer				
PTA Membership Chair				
_____ Chair				
_____ Chair				
_____ Chair				
Your Local PTA Unit ID Number*: _____				
Your Unit EIN*: _____				
*Check "Find Your PTA" at PTA.org for this number.				
**Check with the state PTA office or the unit's treasurer for this number.				

Leadership Transition

LEADERSHIP DEVELOPMENT

Overview

As you begin your journey as PTA President, you should also be thinking about your final day in that role. Smooth transition ensures the work you do now is part of a series of PTA successes. Few will remember the great things you do if your PTA falls apart at the end of your term. Start planning now to leave behind a legacy of success.

Successful transition has two components: Leadership development and communication. You play a vital role in both.

Smooth transition through leadership development:

Assess the strengths and weaknesses of current board members. Provide board members with opportunity to grow new skills. While you cannot “crown” your successor, you can know you were successful if your PTA’s Nominating Committee has a hard time choosing a candidate for president because there are so many qualified and capable potential candidates to choose from. Consider providing opportunities for board members to become potential next presidents by:

- Assigning them to attend a meeting on your PTA’s behalf.
- Asking them to join you in a meeting with teachers or the principal or the superintendent.
- Giving them an opportunity to take the lead on building a relationship with a new partner or sponsor.
- Allowing them to attend state leadership conferences.
- Making them part of your PTA’s delegation to the state or National PTA convention.
- Nominating them to chair a special committee.

Smooth transition through communication:

An incumbent president should:

- Meet with incoming leadership. Discuss what worked and what did not. Help incoming leaders get to know the community, its people, and its goals.
- Arrange meetings with contacts. Introduce the new leadership to teachers, administrators, community partners, and community leaders.
- Hand over the records and materials. PTA records and materials belong to the unit, not to any one individual. Make sure the incoming officers have the passwords, documents, account information, etc., they need.
- Hand over the “board book.” Make sure the incoming president has bylaws, policies, financial reports, 990s, minutes, and anything else he or she needs to start their year. Answer questions, calm nerves, and assure people you are willing to help in the coming year.
- Introduce the new team to the membership. It is important that members see a smooth succession and know that the PTA and their children are in good hands. Encourage incoming leaders to attend PTA meetings. Encourage your members to welcome the new leaders.
- Change contact information. Make sure the state PTA knows who is coming. Make sure the new person receives the PTA Back to School Kit. Update your database, official records and website.

Planning the PTA Year

Overview

One major role of a board is to develop short- and long-term goals and create plans to achieve those goals. A plan, including goals and objectives, for the year should be written, each board member should have a copy, and you might consider sharing it with school staff and the principal if you are a school-based unit. School-based unit leaders should also consult with school staff so that PTA and school are working in partnership to create and achieve goals.

The written plan of overall goals and specific objectives should be used by the finance committee in developing the budget. Planning also should include an evaluation mechanism for ongoing measurement of your PTA's progress and successes.

Revisit your goals throughout the year and check to see if you have attained them, or what has changed. Plans, like budgets, are living documents. They need attention in order to thrive. Your PTA may need to make changes as the year progresses. The best plans are always in evaluation and adjustment so that goals can be achieved.

Goal Planning Step by Step

Determine the purpose of PTA in your school (remember to use the PTA mission as a guide: Be a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child).

- Review past and current activities of the PTA (did past activities meet the needs and goals of the association?).
- List all available resources for the PTA (funding, membership, local assistance from other organizations and agencies, facilities, National PTA grants and awards, etc.).
- Gather input from parents, teachers, and administrators on school and community needs through surveys and discussions.
- List the types of activities for consideration.
- Prioritize ideas and select the two or three that best meet the board's goals.
- Plan fundraising to support the goals.
- Develop a calendar for activities and assign committee responsibilities.
- Evaluate the activities using measurable outcomes.
- Report your success to your PTA members and to your community.

Planning the PTA Year

Objectives Checklist

Your plan objectives should follow **S.M.A.R.T.** guidelines (Specific, Measurable, Attainable, Relevant, Time-bound).

Specific

- ☐ Is the main intent stated?
- ☐ Is the main intent specific?

For example: The XYZ PTA will work with staff to increase reading scores. In addition to our other work, we will include at least one reading readiness assembly, at least one book fair, and create a community read-a-thon.

Measurable

- ☐ Is the outcome measurable?
- ☐ Are you able to determine if the outcome can be achieved?

Attainable

- ☐ Is the goal achievable during the time period established?
- ☐ Is the goal satisfying, or agreeable, for all people involved? Is the goal in line with the mission and purpose of PTA?

Relevant

- ☐ Is the main intent relevant to the objectives of the group?
- ☐ Is the goal applicable to the unit?

Time-bound

- ☐ Is there a time frame within which the goal must be met?
- ☐ When will the goal be met?

Planning the PTA Year

Goal Planning Guide

Objective	Plan for meeting this objective	Time frame
Encourage parents to be involved in the school.		
Inform parents about issues that affect student success.		
Participate in the state PTA convention or other state PTA- sponsored events.		
Increase membership by 5 percent.		

Planning the PTA Year

Frequently Asked Questions About Planning and Goal Setting

What is a plan of work?

A plan of work lists the goals of your PTA and the expected means by which those goals will be reached. The plan of work guides the unit's activities for any given fiscal year. Committee chairs also prepare a plan of work (which must be approved by the executive committee or board) for their committees.

How is a plan of work put together?

Survey your PTA members on their perceptions of the school's most urgent needs. Once identified, these needs should be grouped and prioritized. The highest priorities should guide you in setting the PTA goals for the year. Establish ways the PTA can best help meet those needs, and estimate how much money your PTA will need to reach its goals; then identify sources of funds and create a budget.

On the following page is an example of a committee plan of work template recommended by Texas PTA.

Planning Resources

Take the Planning and Goal Setting e-learning course at PTA.org/e-learning.

Plan of Work

Officer/Chair Name: _____
(Nombre de Oficial/Presidente de Junta)

Position: _____ Year: _____
(Posición) (Año)

Responsibilities/Duties: (Responsabilidades)			
Goal: (Meta)			
Specific Action Steps (Proceso Especifico de Acción)	Start Date (Fecha de Empezio)	Completion Date (Fecha de Terminación)	
Budget: (Presupuesto)			
Resources: (Recursos)			
Evaluation Process: (Proceso de Evaluación)			
Committee Members: (Miembros del Comité)			

Effective Meetings

Overview

PTA meetings may be board meetings, executive committee meetings, committee meetings or general meetings. Check your unit's bylaws to determine how many of each type of meeting is necessary. In general, only those individuals who belong to the group (board, committee, general membership) need to be at that meeting.

No matter what the type, meetings should provide information, inspiration, and instruction for local members. General meetings are open to all PTA members. The privileges of introducing motions and voting are limited to members. To ensure that you are covering everything in your meetings, take the PTA Basics course at PTA.org/e-learning.

For best results, schedule meetings that are convenient for your membership, stay on task, and start (and end) on time. If attendees feel something significant was accomplished, they will come back. Ask your members in a poll or survey the best time to hold a meeting.

If you chair the meeting, you are the leader. First, confirm that the meeting was called for a specific purpose. Then, direct all conversation at the meeting to address this purpose.

Conducting Meetings

The president's primary role is as facilitator. The role of the president during meetings is to organize and conduct the business of the PTA.

- Recognize members to speak. Make sure people speak to the chair, not each other. This helps avoid sidetracked conversations or one or more people dominating the conversation.
- Remain neutral on questions and presentation of information. Take no part in any discussion while presiding. Call upon the vice president to preside if you wish to speak to a motion; the president then has all the privileges of a member. The president returns to the position of meeting chair only after the vote has been announced.
- Use your voting option rarely, if ever. Presidents are most effective when they remain neutral facilitators of discussion.
- State each motion clearly after it has been seconded before allowing discussion.
- Vote, but only when voting is by ballot. In all other cases, the president may not cast a vote unless it is to break a tie on an issue critical to the unit.
- Declare the result of every vote taken so that it can be recorded in the minutes.

Meeting Agenda Checklist

The PTA meeting agenda should include:

- Approval of the minutes, a written document recording the events of the previous meeting
- Report of officers, standing committees, and special committees (as needed, if written reports are not available)
- Special orders (mostly business that comes up once a year; nominations/elections)
- Unfinished business (motion that was under discussion and postponed at the last meeting)
- New business

- Announcements
- Adjournment

Frequently Asked Questions About Meetings

Do we have to meet? How often?

If you do not have a reason to meet, do not set up a meeting! However, be sure to check your bylaws for a minimum number of meetings that must be held.

What do I do if there is a heated debate?

Maintain your impartiality; a chair is like a judge in a court. Ensure that all participants have a fair opportunity to express their points of view. Robert's Rules are designed to assist you—the rules allow all sides to be heard and the majority to rule. Then take control so that the meeting can continue to be productive.

What if someone is dominating the meeting?

Be assertive and use phrases such as, "I think we should hear from some other attendees," or, "Can we have some comments from the rest of the group on this?" You may want to ask your secretary or VP to list names of individuals as they raise their hands to speak so that you can call on them in order. A good ground rule is that everyone who wants to speak gets a chance to speak once before someone gets a second turn.

What if the meeting starts off well but gets stuck on a particular topic?

Take control and suggest another meeting to discuss the issue at a later date, or suggest that the concerned parties continue the discussion at the end of the meeting. Sometimes it will be necessary to call for a decision and then move on to the next topic.

What can I do to ensure that everyone is clear on what took place and what action is required?

Summarize the meeting; state concisely, and in an impartial way, what was said. End with a clear statement about what is expected to happen next. A nice touch is to thank all who attended the meeting, tell them what got accomplished thanks to them, and thank them for taking time to help the PTA make a difference.

What if I feel like I am being the "bad guy"?

Remember that it is your role and responsibility to be fair and efficient and to keep the meeting on target; at times, this requires that you be firm.

Effective Meetings

Meeting Agenda Example

Sample Agenda from a General PTA Meeting:

ABC Middle School PTA General PTA Business Meeting
September 6, 20_____ 7:00 p.m.–8:00 p.m.

- I. Call Meeting to Order
- II. Approval of the Minutes
- III. Reports of Officers (try to limit to 2-3 minutes of highlights, put the rest in writing for all to see)
 - Treasurer's Report
 - President's Report
 - Membership Report
 - Principal's Report
- IV. Reports of Committees (same—2-3 minutes, in writing if more complicated)
 - Back-to-School Picnic Chairperson
 - Family Swim Night Chairperson
 - Fundraising Chairperson
 - Apparel Chairperson
- V. Unfinished Business
 - Dads and Donuts—Postponed this item at the last meeting. Discussion tonight regarding whether to have a Dads and Donuts morning this school year. Approximate cost is \$200, unless we can get business sponsors to donate donuts, juice, and paper products. Budget adjustment may be necessary.
- VI. New Business
 - Math Club (\$100 donation for supplies)—The Math Club requests six new calculators for an upcoming competition. The club has grown by 10 new students this year. Budget adjustment may be necessary.
 - Ink cartridge recycling program—Smith Recycling has a program to recycle empty printer ink cartridges. We can earn money and/or choose items from their catalog to benefit the school. Do we want to add this fundraiser?
 - Summer Leadership—We budgeted for 4 members to attend Summer Leadership this year. Selection is via nomination. 8 people have applied. Do we choose four, or do we adjust budget to accommodate more and then choose that number?
- VII. Announcements
 - September 15—Swim Night
 - September 18—Apparel Sales Begin
 - September 21—Fundraiser Kick-Off
 - October 2—Breakfast with the Principal
 - October 4—PTA Meeting

Effective Meetings

Meeting Tips

Effective meetings require preparation, facilitation, inspiration, and results.

Preparation means you come to the meeting ready to state the purpose and agenda.

Facilitation means the leader (or chair) keeps the meeting on time and on track, allowing input from the group appropriately.

Inspiration means you incorporate activities that engage participants and generate discussion, and you use visual aids to grab attention.

Results mean that the meeting achieves one or more outcomes.

Share the results to keep participants connected to the work of your PTA.

Be sure to take the Conflict Management and Parliamentary Procedure courses available at PTA.org/e-learning.

The president controls whether a meeting gets side tracked, are dominated by one individual, loses focus, and starts and ends on time. A meeting that is well-run, starts and ends on time, stays focused and gets things done is desired by all who attend. Want meeting attendance to grow? Run an effective meeting.

PTA surveys tell us that members want to know why they are meeting, feel like their time was used well making decisions and feel like they accomplished something with the time they spent at the meeting. Consider adding social time before or after the meeting so that those on busy schedules feel their time is well-used, and those who want to socialize have time to network.

Key Term: Minutes

The official record of a meeting is referred to as the minutes. According to the IRS, minutes need to be treated as a permanent file and kept forever. All officers should have copies of the minutes in their procedure books. The originals and a copy should be kept in a secure file at the school, if possible. Minutes **MUST** be in order to prove that action has been taken; for example, to prove that funds were expended in accordance with the bylaws and approved budget. A printed treasurer's report should be attached to the minutes. The minutes also should include a sign-in sheet to record attendance. Remember, if it is not in the minutes, it did not happen.

Effective Meetings

Sample Meeting Minutes

Minutes of
The ABC Middle School PTA
General Membership Meeting

September 2010

PTA President Richard Roe called the meeting to order at 7:00 p.m. A quorum was established with more than 60 PTA members in attendance.

PTA Treasurer Betsy Bow reviewed the budget. There was a motion to approve the budget. The budget was approved by the majority.

Membership Chair Lois Lane reviewed the results of the Back-to-School membership drive. She reported that 30 new members joined during the drive, many of whom were parents bringing their children to start their very first day of school.

President Roe called for volunteers to help plan and run the winter holiday fundraiser. He introduced June Jones, the chair of the winter fundraiser. June Jones said the theme for this year's fundraiser would be "Tech the Halls" and would have electronic and futuristic decorations and activities. Jones named the various tasks that were available for volunteering and explained the process for signing up to volunteer. She mentioned that the fundraising goal was \$5,000. Reflections Committee Chair Donna Doe talked about the Reflections contest, explaining the theme and how to get involved.

Health and Wellness Chair, Jim Halloway, moved on behalf of the Health and Wellness Committee to contract with "Mr. Body" to provide an assembly this Spring. Jim said the assembly focused on healthy eating and lots of physical activity, it met the parameters in the Committee's work plan, and it falls within the budget approved by the board for the committee. Motion did not need a second as it came from committee. Motion carried.

Principal Sandi Silo thanked everyone for coming and invited people to join her for her monthly coffees.

President Roe thanked all for coming and invited everyone to the upcoming Family Swim Night. The meeting adjourned at 7:45 p.m.

Prepared by,
Jane Johnson
Recording Secretary

Parliamentary Procedure

Overview

Parliamentary procedure is a set of rules for conducting orderly meetings that accomplish goals fairly. Benefits of parliamentary procedure include the following:

- Justice and courtesy for all
- Maintenance of order
- Consideration of one item at a time
- All sides get heard
- Ability for each member to provide input
- Majority rule
- Maintenance of the rights of the minority

Basics for Presidents

- One motion on the floor at a time. People must speak to the motion on the floor—do not lose control of the meeting by letting the conversation get sidetracked.
- Ask for a motion. It is easier to focus conversation if your PTA starts with a motion. Then discussion can be channeled around pros and cons as the group explores one idea at a time. Motions make people focus on an issue. Making a motion forces people to get the crux of the issue early.
- Do not be afraid of parliamentary procedure, but do not use it as a weapon. Your role is to facilitate discussion and help people participate in discussion. Use parliamentary procedure to make sure everyone gets heard, no one dominates, and ideas are fully explored before majority rules through voting.

Parliamentary Procedure Resources

Take the Parliamentary Procedure e-learning course at PTA.org/e-learning.

Visit the Robert's Rules of Order website, robertsrules.com.

Keep a copy of Robert's Rules of Order Newly Revised (designated in the bylaws as the form of parliamentary procedure followed by PTA).

Bylaws and Standing Rules

Overview

Bylaws are the rules the local unit must follow. They are adopted and amended by a vote of your unit's members at a general meeting. PTA bylaws may not conflict with the bylaws of National PTA or the state PTA and they cannot conflict with state or federal law. If your unit is a 501(c)(3), bylaws are required for nonprofit status. If you cannot find a copy of your unit's bylaws, contact the state PTA office to obtain one. All officers and board members should be familiar with their local unit bylaws.

Any member has a right to view them.

Bylaws do not have to be complicated. However, they should provide the following important information:

- The structure of the local unit board
- Information on required meeting dates (may include how meeting notification is given)
- Requirements for a nominating committee
- How and when to conduct elections
- Dates for the fiscal year
- Requirements of a quorum for conducting business

TIP: Your unit must comply with its bylaws. If your unit is having trouble staying within bylaws, consider amending the bylaws to meet your current needs. Be sure to follow your bylaws when you revise or amend the document.

Suggested Bylaws Checklist

Article I	— Name
Article II	— Purposes
Article III	— Basic Policies
Article IV	— Relationship with National PTA and [State] PTA
Article V	— Membership and Dues
Article VI	— Officers
Article VII	— Duties of Officers
Article VIII	— Board of Directors/Managers
Article IX	— Executive Committee
Article X	— Committees
Article XI	— General Membership Meetings
Article XII	— Council Membership
Article XIII	— [State] PTA Annual Meeting
Article XIV	— Fiscal Year (if required by state PTA)
Article XV	— Parliamentary Authority
Article XVI	— Amendments

Bylaws and Standing Rules

Bylaws Resources

You can review the wording of bylaws and standing rules from other local units by:

- Asking for examples from your state PTA
- Taking the Parliamentary Procedure e-learning course at PTA.org/e-learning
- Searching online using the keywords “PTA bylaws” or “PTA standing rules” to see bylaws that other local PTAs have put on their websites

Key Term: Standing Rules

Standing rules outline the procedures of the association with specific details that are not included in the bylaws and that must not conflict with the bylaws. Standing Rules are a board document. Unlike bylaws which can be changed only by membership, standing rules can be changed more easily, usually by a majority of the board at a regularly scheduled board meeting.

Some examples of the differences between bylaws and standing rules are:

- Bylaws state when the meetings of the association and executive board are held, and perhaps how many meetings are required per year. Standing rules tell where and what time these meetings are held.
- Bylaws give the primary responsibilities of officers and chairs. Standing rules give the specifics.
- If the bylaws state that the first vice president is responsible for a program, the standing rules would list the various chairs who work with the vice president under the first vice president’s title.
- Standing rules are the details of PTA work. They may be changed from administration to administration or from meeting to meeting.

Frequently Asked Questions About Bylaws

How are changes made to the bylaws?

To consider changes to the bylaws, a small committee should be appointed to study the proposed changes and to make recommendations to the board for their approval. Your bylaws will tell you how much notice is necessary. This is usually 30 days. A bylaws change typically requires a two-thirds majority vote of the members present at the general meeting if 30-days’ notice of the change was not given, and a majority vote if 30-days’ notice was given unless otherwise stated in your bylaws.

Who should have copies of the bylaws?

The entire board should have a copy of your current bylaws. Upon request, copies should be made available to all members.

What is a quorum, and how do I know what our unit’s quorum is?

The quorum is the minimum number of members who must be present to conduct business at a PTA or board meeting. The number for your unit is set by your bylaws. If a quorum is not met at a meeting, then a vote cannot be taken. You may hold a PTA meeting without a quorum, but a vote cannot be taken. Check with your state PTA to determine the minimum quorum allowed by state law.

Finance

Managing PTA Money

Managing the finances of a PTA is crucial to everything else you do. Not only is it essential for reasons relating to the funding of programs or events, but there are federal requirements that all not-for-profit organizations must follow, or else risk losing their tax-exempt status. Abiding by federal guidelines is extremely important to maintain tax-exempt status and ensure that your PTA is financially sound. Seek out qualified persons who would like to volunteer in this role of managing money.

As the local president, there are two major areas you need to oversee:

- Creating and managing a budget according to bylaws
- Filing IRS, federal, state, and local reports appropriately

Ultimately, you are the leader and you are responsible for making sure that the treasurer conducts himself or herself in accordance with PTA bylaws.

National PTA produces another Quick Reference Guide called, Money Matters. While it is a good idea to hand Money Matters to your local unit treasurer, you should consider sharing the entire document with your board. Money Matters explains what a PTA leader needs to know about money management. Just because it falls under the treasurer's job description, the board does not get to ignore finances. Ultimately, it is the board's job to manage the PTA's money and to provide fiscal oversight. Make sure your board has the knowledge to do this—sharing Money Matters is a good way to begin.

You can find an electronic version of Money Matters at PTA.org/MoneyQRG

Financial Management Checklist

As PTA president, you must work with your treasurer to:

- File a new signature card with the bank immediately (a transition letter from the outgoing treasurer to the bank may be necessary to enact the change)
- Know the PTA's bank balance
- Make sure the treasurer has viewed the books before accepting them from the outgoing treasurer
- Ensure the budget is approved by general membership if bylaws mandate before funds are spent.
- See that the treasurer gives a written financial report at all PTA meetings (board and general membership)
- See that the treasurer has the unit's federal Employer Identification Number (EIN)
- Ensure that two signatures are on all checks
- Make sure the treasurer pays, as authorized, all expenses by check (never cash), and never uses signed blank checks.
- Helps the treasurer get receipts for every expense and requires receipts for reimbursement of expenses
- The president must also work with the treasurer to make sure:
 - Receipts are written by the treasurer when money is received by the PTA.
- Your unit has a procedure for counting money (e.g., from a fundraiser) that includes two people and a signed receipt documenting the amount
- Deposits are made in a timely fashion into an authorized PTA bank account (never into a personal account, into a school building account, or into the account of another organization)

- Appropriate financial records are kept on file including receipts and invoices
- Minutes reference expenditures and those minutes are kept on file
- Bank statements are reconciled monthly immediately upon receipt by the treasurer
- Dues are paid on time
- Books and records are reviewed annually

Financial Management Tip

For the position of treasurer, seek a volunteer from the community who is a CPA, a bookkeeper, a tax preparer, or a mathematics tutor. Provide him or her with any software package or spreadsheets that the outgoing treasurer used in the previous year and an accounting of recent transactions that may not have cleared the bank.

For detailed information about the financial management of your PTA, please refer to the PTA Money Matters Quick-Reference Guide at PTA.org/MoneyQRG.

Membership

Overview

PTA is a membership organization. We rely on our members to contribute their time and skills to school communities from coast to coast and overseas, and where U.S. military families are stationed.

Every individual who joins PTA is giving something not only to his or her child but also to every child. Imagine how strong your community could be if every parent, community member, and business leader got involved in PTA!

Attracting new members and retaining existing members are among the most important duties of a PTA board. A strong membership is essential for PTA to be a force in decisions involving the welfare and education of children. Your active leadership will help create strong programs in your school community and strong commitment among your members.

Tracking Member Data

As PTA president, you must make sure your membership chair:

- Creates and maintains a membership database. This is a crucial tool for your membership recruitment and retention efforts. It will help you keep track of members, dues payments, and mailings/e-mails.
- Signs up your PTA unit for Just Between Friends (JustBetweenFriends.com/PTAquickstart). Just Between Friends is an easy-to-use tool that allows your unit to manage your members, communicate with your entire school, create directories, and manage volunteers.
- Uses e-mail. E-mail allows you to communicate with members who are not able to attend meetings. Collect e-mail addresses on your membership form. As new member benefits become available, National PTA will e-mail unit presidents. These messages will be written in a newsletter format that you can use in your PTA newsletter or forward to your membership via e-mail. Occasionally, PTA member benefit e-mails will be sent directly to PTA members.

Just Between Friends

Just Between Friends is the PTA management and communications system. It is offered free to local PTAs to strengthen your PTA and simplify the lives of leaders and members.

Use Just Between Friends for member management (including membership card printing), communications (e-mails with attachments and automatic reminders), print and online directories, and volunteer management (a module that includes participant management suitable for PTA Reflections and Three For Me). Learn more at LearnJBF.com. Sign your unit up at JustBetweenFriends.com/PTAquickstart.

Membership

Membership Resources

Check out Just Between Friends for local unit leaders at LearnJBF.com.

Membership cards are available through state PTA offices.

Use the Membership Marketing Templates and Tools available online at PTA.org/marketing. These are ready-to-print posters, fliers, and ads for you to customize for your PTA. There is also a Membership Recruitment and Retention Manual.

Discuss best practices with the PTA Membership group in the PTA Great Idea Bank, at

PTAgreatideabank.org.

Find programs and resources to promote the involvement of dads and other male role models through the PTA MORE (Men Organized to Raise Engagement) alliance. Go to PTA.org/MORE.

Inform your members about special offers from PTA National Member Benefits Providers. Details can be found at PTA.org/Benefits.

To learn more about recruiting and retaining members, refer to the PTA Membership Quick-Reference Guide at PTA.org/MembershipQRG.

Volunteer Management

Valuing Your Volunteers

Establish and maintain a good relationship with all volunteers. Some volunteers may participate on a regular basis, some for short periods of time, and some only for special events, but all of them are vital to the success of your PTA! If you want their help, make sure they know that they are welcome and valued.

Volunteer Chair Checklist

Assign a volunteer chairperson to oversee volunteer management and to work in partnership with your membership chair. A volunteer chair does the following:

- Contacts every person who offers to volunteer. The fastest way to lose a volunteer is not to contact them. Make sure every offer of help is acknowledged, even if you have more volunteers than you can handle for a specific event. Surveys potential volunteers to determine their skills and areas of interest
- Matches volunteers to potential jobs
- Arranges for general orientation of all volunteers, as well as volunteer workshops or training sessions
- Helps volunteers become familiar with school policies, people, programs, and the school building itself
- Explains the volunteer program to teachers, and surveys teachers to determine their needs for volunteer help
- Matches the needs of teachers with the interests and abilities of volunteers in making assignments
- Provides a variety of experiences for volunteers
- Tracks what projects volunteers worked on and time spent
- Keeps volunteer files current and in order
- Seeks feedback. Did the volunteer have what he or she needed to do their job? If not, what was missing?
- Recognizes volunteers. PTAs cannot function without volunteers. A good PTA regularly recognizes volunteers, no matter how many hours were donated. Time is a precious commodity. Good PTAs appreciate all efforts.

Volunteer Tips

Volunteers are diverse, and so are the factors that motivate them; find out what they want to accomplish and experience through volunteering.

- Volunteers need encouragement.
- Volunteers need to be treated with respect.
- Volunteers need to feel wanted and needed.
- Volunteers need help and direction.
- Volunteers need praise.
- Volunteers need meaningful assignments.
- Volunteers need recognition and appreciation for their efforts.

Visit the PTA store at totalpromote.com/pta for recognition gifts. Make sure volunteers are contacted throughout the year.

Respect volunteers' time and give them as much notice as possible as to when you will need them.

Volunteer Management

A Successful School-based Volunteer Program Step by Step

1. Assess the need for volunteers at school. Volunteer coordinators should:
 - Discuss the merits of volunteers and address concerns among school staff, teachers, and volunteers.
 - Survey/interview teachers, principals, and other school staff to determine all areas where volunteers could work.
 - Survey parents to learn about their talents, interests, and skills.
2. Work with principals, teachers, and school staff on effectively using and supervising volunteers. The principal can serve as the overall supervisor of a school's volunteer program. PTAs can encourage principals to do the following:
 - Inform school staff about the mission of the volunteer program and enlist support.
 - Make some space available to volunteers to use, such as a workroom or even a desk. This is to show that volunteers are a part of the school and can keep their materials handy.
 - Hold meetings with volunteers and school staff to create team spirit.
 - Assist in providing training to staff regarding working with volunteers.
3. Set goals and objectives for volunteer assignments. To ensure a successful volunteer program and long term involvement, it is important that assignments be selected carefully and be productive, meaningful, and closely matched to volunteers' interests, skills, and motivation for volunteering. No one wants to waste their time or energy.
4. Recruit volunteers. Recruitment should take place throughout the year to replace volunteers and enlist assistance for new programs.
 - Schools might overlook the large population of adults who work second and third shifts, weekends, or flexible schedules. Fit people in on their time! What projects can be completed at home?
 - Senior citizens are a highly talented pool of knowledgeable adults with unlimited skills that can be adapted easily to school curriculum and programs. Ask senior groups about volunteering, and invite them to join your PTA.
5. Train and orient volunteers. Orientation and training should be welcoming, relevant, hands-on, and geared toward the specific skills and responsibilities of each volunteer. Appropriate teachers or school staff should give input into or be part of the training session.
6. Recognize volunteers. To create and sustain a feeling of belonging and satisfaction among volunteers:
 - Provide ongoing training to develop new skills.
 - Treat volunteers like colleagues.
 - Recognize volunteers for their work.
7. Evaluate volunteer performance and program success. Use surveys, general observations, and interviews to assess whether the volunteer program goals are being met.

More About PTA Volunteers

Frequently Asked Questions About PTA Volunteers

Who can be a volunteer?

Anyone who supports the mission and goals of PTA.

It is strongly suggested that all volunteers who will work in a school building or directly with children are cleared through a background check for the safety and security of all students. If your volunteer program is coordinated at the district level, work with the personnel department to establish procedures and release forms for clearing volunteers, especially if they will interact with children.

How can we recruit volunteers?

Be creative in arranging your recruitment meetings. At these meetings, volunteer coordinators can talk about the importance of, as well as the need for, involvement in the school. Consider holding recruitment meetings:

- At local work sites
- At senior centers or retirement communities
- In community rooms at apartment complexes
- At the student union building of a local college
- At the retired teachers association meeting
- At fraternal organizations, civic groups, and women's clubs
- At a chamber of commerce luncheon
- In a high school class, club, or organization

Tip: Consider asking for volunteers after a successful PTA event. "If you enjoyed tonight's Ice Cream Social, please consider volunteering 2 hours next month so we can do it again."

Tip: Make the ask specific. If you need two hours, say it. If the job can be done at home or with family, say it. When does the job need to be done? Can someone give you the two hours in 30 minute increments? Be sensitive to the fact that many members need to know the commitment before they are willing to volunteer.

Are volunteers protected from liability?

Yes, to an extent. Because the federal government realizes the importance of and need for volunteers, it passed the Volunteer Protection Act of 1997. Under the law, volunteers (but not the organizations they serve) cannot be held liable for negligent acts or omissions that occur during the course of their duties. However, if someone was injured because of a volunteer's willful and wanton misconduct, including the influence of drugs or alcohol, this protection would not apply.

PTA: Your Source for Program Ideas

The great thing about PTA is that you do not have to reinvent the wheel. You have so many resources and so much support available. Visit PTA.org and your state PTA website. Read articles from PTA's *Our Children* magazine. Call your council and network with PTAs in your area. Attend PTA conventions and leadership conferences.

National PTA Programs**Parent Involvement and Family Engagement****Family-School Partnerships****PTA Take Your Family to School Week****PTA Teacher Appreciation Week****Urban Family Engagement Initiative*****Health and Safety***

- PTA Healthy Lifestyles
- Connect for Respect Bullying Prevention Program

Student Success and Enrichment

- PTA Reflections (an arts competition)

For more information on planning programs, refer to the PTA Programs Quick-Reference Guide at PTA.org/ProgramsQRG.

National PTA Awards and Grants

Local PTAs in good standing are encouraged to apply for awards and grants from National PTA, many of which offer PTAs funding. The awards and grants offered include:

- Phoebe Apperson Hearst Family-School Partnership Awards
- Mary Lou Anderson Reflections Arts Enhancement Grants
- PTA Outstanding Advocacy Award
- Shirley Igo Advocate of the Year Award
- Jan Harp Domene Diversity and Inclusion Award

PTAs can also purchase the National PTA Life Achievement Award, PTA's highest honor, to present to individuals who daily live out their commitment to children.

More details on these awards can be found in the PTA Programs Quick-Reference Guide; you can also find application information online at PTA.org/nationalawards, and, for the advocacy awards, PTA.org/LegCon.

Program

Recommendations for Program Success

Program Planning Tips

In program planning, your PTA's relationships with school staff, families, and community stakeholders are essential. Work together to make programs meaningful and effective.

FIND OUT about each partner's interests and needs.

REACH OUT to these partners on their own turf with specific offers of assistance.

SPELL OUT the purpose and terms of joint efforts, including what will be done by whom.

WORK OUT the kinks as they arise and change your approach when necessary.

BUILD OUT from success by sharing positive results and encouraging expanded efforts.

Family Engagement Tips

A family engagement program can serve as a forum for discussion and a conduit for change. It is important to keep in mind the following points:

- All parents want what is best for their children. Do not assume that a child's parent "just doesn't care" because you do not see him or her at school. Find ways to include all families in your programs.
- There is no "one size fits all" answer to partnerships. Identify the strengths, interests, and needs of families, students, and school staff, and work from there. Set clear and measurable goals based on family and community input.
- Use a variety of communication mechanisms to inform families, businesses, and the community about family involvement policies and programs. These mechanisms can include phone calls, e-mail, newsletters, fliers, public service announcements in local newspapers and on cable TV, websites, social media, and public forums.
- Provide a varied menu of opportunities for participation geared to the diverse needs of families, including working families. Schedule programs and activities flexibly. Recognize that effective family involvement takes many forms that may not necessarily require parents' presence at a workshop, meeting, or school.
- Ensure that families and students have complete information about the standards students are expected to meet, examples of student work that meets these standards, and understanding of how students will be assessed. For example, hold curriculum nights to feature the standards and exhibit student work. Provide workshops on state testing.
- Ensure that families and students have access to information about nutrition and health care, after-school programs, and community service agencies.
- Recognize how a community's historic, ethnic, linguistic, and cultural resources can generate interest in family and community participation.
- Arrange opportunities for families to discuss their children's progress, raise concerns, and work as partners with school staff to solve problems that arise.

- Make sure that family members acting as volunteers in the school have opportunities to help teachers in meaningful ways, such as assisting with instructional tasks and administrative functions. In addition to being tutors and classroom aides, family members might speak to students about their careers, explain customs from their cultural traditions, or demonstrate special skills.
- Involve families in evaluating the effectiveness of family engagement programs on a regular basis and use this information to strengthen the programs.

Program Planning Step by Step

Work with the PTA programs chair to develop and implement programs that will meet your PTA goals and address school and community needs.

1. Identify needs and select a program. Contact parents, teachers, and school leaders and ask what specific needs the PTA could address through a program. Report your findings at a PTA meeting and discuss your options. By the end of the meeting, decide what direction your PTA should take, as well as what issues interest PTA members most.
2. Plan the program. Determine the scope and goals of the project; prepare the plan of work, timeline, and budget. Consider working with other groups or organizations to expand the project's impact.
3. Raise funds. Traditional fundraisers (such as auctions, contests, dinners, festivals, and lectures) can often provide enough funding for a program, although not all programs should require a fundraiser. Depending on the amount of support required, you also may choose to directly contact businesses and individuals and ask them to donate funds, supplies, or services. Also consider contacting local foundations that support your cause.
4. Promote the program. Send out notices to local media about your program and let the public know what you are doing at your school. Consider asking for donations of radio air time, newspaper ads, printing, billboard postings, etc., as needed.
5. Deliver the program. Remember to make your program accessible to the needs of your diverse school community.
6. Evaluate your success. After your project is complete, conduct a simple evaluation. Ask everyone involved (including volunteers and the program audience) about their experiences. Try to get specifics: What changed for the better, by how much, and how many people were involved? Share your accomplishments with all who worked on or donated to the project.

For more details on implementing PTA programs, refer to the PTA Programs Quick-Reference Guide at PTA.org/ProgramsQRG

Advocacy

Advocating for the Education, Health, and Well-Being of All Children

PTA defines advocacy as supporting and speaking up for children—in schools, in communities, and before government bodies and other organizations that make decisions affecting children. Child advocates work with policy makers at the federal, state, and local levels to ensure sound policies that promote the interests of all children. For more than a century, PTA has provided families and child advocates with the support, information, and resources needed to focus on the health and education of America's youth.

Advocating for Federal Policy

As the oldest and largest volunteer child advocacy association in the United States, PTA has had an indelible impact on the lives of millions of children and families. PTA's legacy includes the creation of universal kindergarten classes, child labor laws, school lunch programs, a juvenile justice system, and local school wellness policies. Each year,

National PTA develops a federal public policy agenda that sets forth the association's recommendations on key legislations and policies up for consideration by Congress and the administration. These priorities are selected based on:

- Timeliness of issue (is it being considered before Congress and the administration)

- Opportunities for PTA to provide leadership and expertise

- Alignment with PTA's mission and resolutions

- Ability to achieve a meaningful policy change that will produce positive results for children and their families

Federal Legislative Chairs

Each state PTA appoints or elects a federal legislative chair (FLC) to serve as the federal policy expert for their state. FLCs are essential to PTA's advocacy efforts, serving as liaisons between National PTA and state PTAs on federal policy matters. FLCs are responsible for communicating PTA's federal public policy priorities to PTA members in their states, identifying and mobilizing PTA members to advocate on behalf of PTA, and building their states' advocacy capacity by providing training and opportunities for federal advocacy.

Along with state and local PTA presidents, FLCs build and maintain relationships with federal policy makers.

Here are some examples of how local PTA leaders can influence federal level policy:

- Encouraging PTA members to sign up for the PTA Takes Action Network and respond to action alerts
- Highlighting federal policy priorities and updates at local PTA meetings
- Scheduling meetings with Members of Congress and/or their staff in local Congressional offices to advocate for PTA's federal public policy priorities
- Inviting Members of Congress and/or their staff to site visits
- Hosting a training on federal policy, utilizing the FLC as a resource
- Writing a letter to the editor related to federal policy
- Attending the National PTA Legislative Conference

Advocating for State Policy

State laws can have a major impact on the health and education of our children. Involving PTA members in state and local advocacy is an important part of securing adequate state laws, funding, and policy for the care and protection of our children.

Here are several examples of how local leaders can influence local and state policy:

- Working with state legislators to influence legislation
- Serving on school boards or attending school board meetings. Volunteering on Parental Information and Resource Center (PIRC) boards to help guide and build relationships between PIRCs and state PTAs
- Attending school district meetings on such topics as state and local budget cuts
- Participating in the school district's Local Wellness Policy
- Working with school leaders and state education officials to implement PTA's National Standards for Family-School Partnerships (PTA.org/Standards)
- Writing a letter to the editor about the importance of family engagement in education

Advocacy Resources

PTA has developed a wealth of resources to help you make a difference in the lives of children. The following—and more—can be found at PTA.org/advocacy.

PTA Public Policy Agenda and Executive Summary—This resource presents National PTA's federal public policy priorities and its recommendations on key legislation and policies up for consideration by Congress and the administration. The Executive Summary provides an abbreviated version of the full Public Policy Agenda. The Executive Summary is also available in Spanish online.

PTA Takes Action Network—Become part of this network to receive:

- **Federal Policy Updates**—A monthly e-newsletter that keeps you informed on federal legislation affecting families, schools, and communities.
- **Action Alerts**—Advocacy alerts that connect you to your members of Congress and highlight actions you can take to influence important legislation.

Advocacy

Online Advocacy Toolkit—This toolkit offers how-to's for building relationships with members of Congress, working with the media, and understanding the legislative process.

State Laws on Family Engagement in Education—This reference guide is intended to help families better advocate for their children at the school and district level, to guide development of legislative reform initiatives by policy makers and advocates, and to support efforts to monitor the implementation of laws already in place.

Common Core State Standards Initiative (CCSSI)—CCSSI is a voluntary, state-led effort to develop clear, consistent academic standards in English language arts and mathematics. National PTA offers resources to support the adoption of common core state standards.

PTA Advocacy: A Legacy in Leadership - *This short video can be used by state, council, and local PTAs to educate and recruit potential PTA members, increase the advocacy capacity of current PTA members, and increase sponsorship dollars.*

Advice from Past Presidents

Advice from Past Presidents

Words of Wisdom

On Getting Your Year Started...

Leadership transition is an important part of beginning (and ending) every school year. The outgoing executive team and committee chairs should share ideas for the future, turn over all important documents, and make any necessary introductions in the school and community. Check your bylaws to determine exactly when each officer assumes his or her duties.

On Planning and Goal Setting...

The old adage “fail to plan, plan to fail” is true! Make sure everybody understands what they are supposed to be doing and when they are supposed to be doing it. Always have a backup plan to respond to unforeseen situations. Take small steps toward reaching big goals, and remember to have fun!

On Effective Meetings...

Ask one or two of your officers or committee chairs to stand at the door to greet every person who attends your meeting. Give everyone a copy of the agenda and direct them to refreshments (always a good idea!) and a seat. Thank them for coming! Give a printed explanation of how to make a motion to everyone attending. Start and end the meeting on time.

On Bylaws...

Be sure to review your PTA's bylaws annually, with an update to the most current edition of standard bylaws (those required or recommended by your state PTA) at least every two years. When in doubt, contact your state PTA for assistance!

On Finance (Budgeting and Fundraising)...

You must understand your PTA's finances from the perspective of the past, the present, and the future. You need to know what happened the year before you got there, what your plan is for the current year, and how you plan to transition your finance responsibilities to the next incoming president in an orderly way.

On Membership...

The best way to boost membership is to let potential members know WIIFM (What's In It For Me?).

So, WIIFM? Student success through family involvement. You can bet that families want their children to succeed. PTA is the best way to ensure this success. PTAs also have access to member benefits, such as e-learning courses, informative e-newsletters, special discounts and offers from national and local member benefits providers, and more.

Advice from Past Presidents

Remember that membership is everyone's business!

On Volunteer Management...

Treat volunteers with respect and consideration. They are not paid for their work; they are donating their time and talents because they want to help children succeed. You also must be very flexible. Understand your school community. If your PTA serves a lot of single families, you may have to divide responsibilities among several people. You may even have to consider changing your bylaws to create "co-" positions for committee chairs to split up the workload. Bottom line—thank ALL of your volunteers every chance that you get!

On Programs...

Make sure the PTA programs you run are the programs your school community actually needs! Also, strive to produce events and programs in which you partner with local businesses or organizations, recruiting past event attendees as volunteers.

On Advocacy...

What is one of the most widely read portions of the newspaper? Letters to the Editor. Get in there!

Just like a chorus singing a song in harmony, your PTA can unite with other advocates and give a strong, clear message about issues that affect children and families. Write in to tell everyone how PTA teaches, inspires, and strengthens your school and the parents of your community.

Awaken the public to advocacy efforts and you can achieve new and exciting advances for children!

On Diversity and Inclusiveness...

We are building an organization that is diverse in terms of race, culture, age, and socioeconomic status—a mix of all people. We are more powerful this way. We are trying to offer a model of how society should look now and for future generations. Look at the people who make up your school community. Your PTA membership and board should reflect your community.

On Delegating...

When you delegate a task:

- Ensure that the person to whom you are assigning the task has all of the needed information to act upon that task.
- Expect responsibility to be taken gradually, with a few glitches along the way.
- Build the person's confidence to carry out the job. Offer constructive advice and give positive reinforcement, but do not take over.

Notes

Notes