



BOARD TRAINING

Your PTA's Name Here

Agenda

- Welcome
- PTA – Purpose and Structure
 - Bylaws
 - Calendar & Roster
- Executive Board & Meeting Information
 - Record Keeping
 - Money Matters
 - Legal Matters
 - Communications
 - Volunteers
 - Issues and Conflicts



**WELCOME
TO THE PTA**



PTA
PURPOSE AND STRUCTURE

PTA 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 bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.



PTA CORE VALUES

- **The California State PTA is a professional, non-profit volunteer organization committed to the well-being of all children.**
- **We believe every adult has a responsibility to ensure that all children develop to their full potential.**
- **We believe parents are children's first teachers and that parent involvement is essential throughout a child's educational experience.**
- **We believe that family is the basic unit of society responsible for the support and nurturing of all children, and recognize that family may be defined in many ways.**
- **We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education.**



PTA MISSION STATEMENT

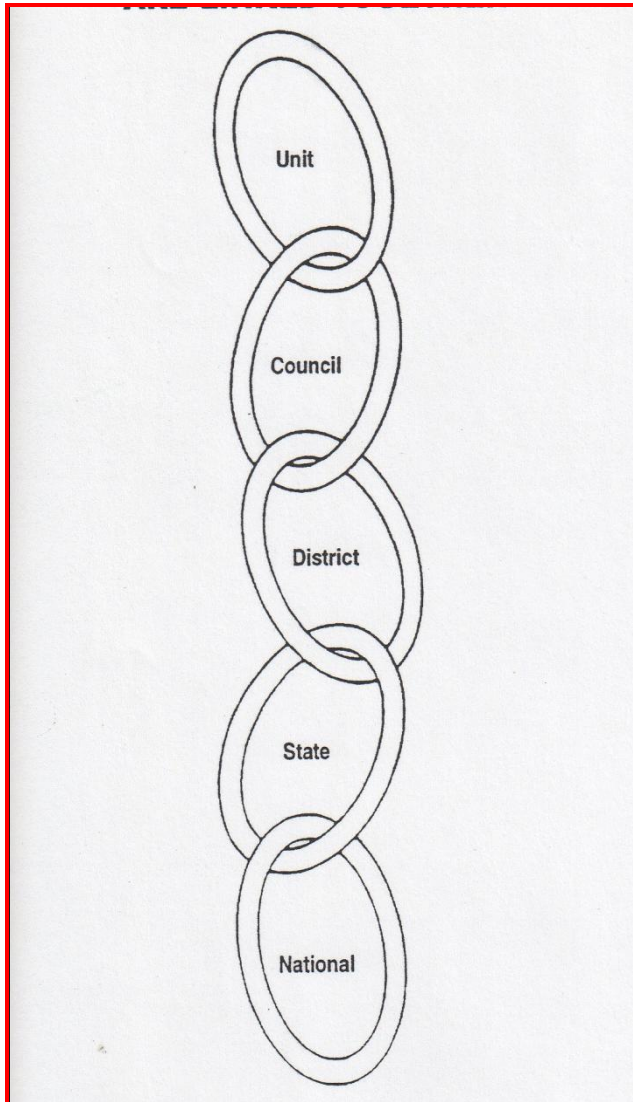
THE MISSION OF THE CALIFORNIA STATE PTA IS TO REPRESENT OUR MEMBERS AND TO EMPOWER AND SUPPORT THEM WITH SKILLS IN ADVOCACY, LEADERSHIP AND COMMUNICATION TO POSITIVELY IMPACT THE LIVES OF ALL CHILDREN.



THE 3 TO 1 RULE

- **When planning the year's activities, PTA's should use the 3 to 1 rule**
- **For every fund-raising activity, there should be at least three non fund-raising projects aimed at helping parents or children or advocating for school improvements.**

HOW PTA'S ARE LINKED TOGETHER



Unit – Your School

Council – Coordinates units in a specific area
Provides counseling to units

District – Serves geographical area
Channels information to Councils
Provides training to councils and units

State – Establishes policies at state level

National – Establishes policies
Advocates nationally



PTA

Bylaws

Each Board Member should have a copy of the bylaws
Think about scanning and sending an electronic copy for members



PTA

CALENDAR & ROSTER

Each Board Member should have a copy of your Unit's Calendar, Roster
As well as a copy of the Council Roster



PTA
EXECUTIVE BOARD INFO.

Top 10 reasons to be on the PTA Executive Board

1. Your family says you need to spend more time on the phone
2. Your calendar has some blanks
3. You crave more e-mail
4. You want more friends
5. You want to work with a budget bigger than your own
6. You do not like sleep
7. You want to learn to do 3 things at once instead of only 2
8. You do not like to cook
9. Paid vacation to Anaheim
10. The KIDS!!!



Executive Board Duties

Transact business between association meetings

Handle business as directed by association

Pay bills

Create Committees

Fill Vacancies

Present reports to Association

Receive Financial Reports



PTA Association

The only group authorized to:

- Elect nominating committee
- Elect officers
- Approve/Ratify all PTA expenditures
- Approve all contracts for PTA programs, events, and projects
- Adopt the budget
- Adopt the audit reports
- Elect convention delegates



PTA MEETINGS



COMMITTEE	WHO ATTENDS	ACTIONS
Appointed by President and ratified by Executive Board	Chair + members President Ex-Officio of all except nominating committee	Meets to handle preliminary work and recommends actions to executive board

EXECUTIVE BOARD	WHO ATTENDS	ACTIONS
Meets monthly	Officers, Principal, Teacher Representative, Chairmen	Review committee recommendations, handle assigned duties, recommend action to association

ASSOCIATION	WHO ATTENDS	ACTIONS
Meetings set in bylaws Check for quorum required for business to be conducted.	Members and guests	Approve expenditures, accept audits, adopt budge, elect officers.

TEAM BUILDING INGREDIENTS

- Create a sense of importance and belonging
- Learn and adjust your dominate leadership style
- Learn to listen and communicate effectively
- Share information and resources
- Learn to delegate
- Share responsibility and authority
- Allow everyone's ideas to be heard
- Stick to the issue and not the emotion
- Jointly set goals
- Believe that everyone has something to bring to the table
- Model the behavior you want



PTA

RECORD KEEPING

Procedure Books

PTA property...not personal property

- Title page with name of officer/chairman
- Name of association, council and district PTA
- Previous officers/chairmen and dates served
- Job description, including summary, located in *California State PTA Toolkit*
- Current bylaws and standing rules
- Finance section that includes budget, financial and audit reports
- Calendar of events and responsibilities for each month
- Reports from current and past officers/chairmen
- Info from appropriate conferences, workshops, trainings & correspondence
- Newsletters or other unit, council or district communication
- Executive board roster



RECORD KEEPING

permanently

- Annual audit reports
- Articles of Incorporation
- Canceled checks, for important transactions (e.g., taxes, contracts)
- Checks should be filed with papers pertaining to the transaction
- Corporation reports filed with the Secretary of State
- Legal correspondence
- Group exemption documents
- Insurance records:
 - Accident reports
 - Claims
- Policies
- Ledgers
- Minutes of executive board, association and committees (bound)
- PTA Charter
- Tax documents:
 - Exempt status
 - Group exemption
 - Letter assigning IRS Employer
 - Identification Number (EIN)
 - State and federal tax forms, as filed
 - Correspondence with state or federal agencies
- Trademark registration

RECORD KEEPING cont.

10 YEARS

- Financial statements (year-end) and budgets
- Grant award letters of agreement

7 YEARS

- Payment authorization and expense forms (receipts attached) for payments to vendors or reimbursement to officers
- Cash receipt records
- Checks (other than those listed for permanent retention)
- Expired contracts and leases
- Insurance incident reports
- Invoices
- Purchase orders
- Sales records

3 YEARS

- General correspondence
- Employee records (post-termination)
- Employment applications

1 YEAR

- Bank reconciliations
- Correspondence with vendors if noncontested
- Duplicate deposit slips
- Current Bylaws, approved by state parliamentarian
- Standing Rules
- Certificates of Insurance
- Inventories of products and materials, updated yearly

Think about getting a file cabinet at your school site so that PTA officers don't misplace these items at home or move away with them



PTA

MONEY MATTERS

\$AFE

MONEY HANDELING PROCUDURE\$

- Assign at least two PTA board members to count cash. One should be a financial officer or a chairman.
- Insurance will cover any two board members.
- Do not publicize the place where money is to be counted.
- Have all those involved in counting money verify the total and sign the Cash Verification Form.
- If money is collected when the banks are not open:
- Contact your bank and arrange a night deposit where funds can be sealed in a cash bag, placed into a night drop receptacle, and retrieved for deposit the next business day, OR Make arrangements with the principal at the site to use the school safe that is bolted to the floor.



\$SAFE MONEY HANDLING PROCUDURE\$ CONT.

- Be sure that the amount is documented prior to depositing it in the school safe or lock box.
- The documented deposit should be placed in a sealed envelope signed by a school administrator and verified by two authorized PTA representatives.
- PTA can also purchase a safe and have it secured to floor.
- Bonding losses will not be paid unless documentation of loss is provided. Period.
- Using correct procedures and making sure there is a paper trail for documentation will help recover monies if there is loss/theft





PTA

LEGAL MATTERS

CONTRACTS, CONTRACTS, CONTRACTS

Before entering into a contract on behalf of PTA, consider the following:

- Has the membership approved the project?
- Does the president have authorization from the board/executive committee to negotiate a contract?
- Have all contracts been received in writing?
- Are the terms and conditions understood by and agreed to by the board/executive committee?
- Do you need review by legal representation?
- Is the length of the contract limited to the term of the participating officers, not to encumber future boards?



CONTRACTS, CONTRACTS, CONTRACTS

CONTINUED

When entering into a contract, the PTA president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and **not the president or second** elected officer as individuals.

The signatures on a written contract should read,

“ _____ PTA (unit, council or district PTA)
by: John Doe, president and Mary Smith, vice president.”



HOLD HARMLESS

**no not sign unless directed by insurance broker
form can be found in Toolkit**

California State PTA insurance does **NOT** cover vendors/concessionaires/service providers.

Consequently, all vendors/concessionaires/
service providers are required to provide

Evidence of Insurance to each PTA, unless annual Evidence of Insurance has been filed with the California State PTA Insurance Broker.

www.bbt-knight.com

PTA INSURANCE

www.bbt-knight.com

You will find all

RED light

YELLOW light

GREEN Light

activities



PTA

COMMUNICATIONS

APPROVAL PROCESS

- The Principal and PTA President **MUST** approve all notes or fliers before copying or going home with students.
- Provide enough time for each to review and changes to be made



FLYER CONTENT CHECKLIST

- ✓ What
- ✓ When
- ✓ Where
- ✓ Purpose – why is action important
- ✓ Admission Fee
- ✓ Contact person
- ✓ Attention Grabber



PRESENTATION TIPS

- Keep language brief and simple
- Use a nice, large, readable font
- Use one large graphic with one or two smaller elements



SOCIAL MEDIA

Facebook pages and other social networks offer an interactive way to offer information like a web page, provide updates like a newsletter and send messages like an e-mail account.

In setting up the page, give careful thought to the amount of information you wish the public to see, and how much freedom others will have to post information on your site.

Part of that decision is how much time the communications team will have to monitor the site in case of controversy.

PTA policies apply to social media use.

SOCIAL MEDIA

CONTINUED

- ❖ Foremost, remember the simple rule: do no harm.
- ❖ Plan on keeping it lively
- ❖ Give updates on school activities and classroom honors
- ❖ List great plays of sports teams or recess games
- ❖ Ask for ideas
- ❖ Post contact information if people are interested in helping on a school project
- ❖ Provide PTA meeting reminders



ELECTRONIC NEWSLETTERS

- Many PTAs are now using electronic newsletters, e-mailed as PDF documents, or using an e-messaging service as the primary way to reach their members. PTAs transmit these weekly, every two weeks, monthly or quarterly.
- Every PTA has members who do not have computer or e-mail access. PTA should try to identify these members and assure that they are receiving the communications by print or perhaps a telephone call.
- Use the newsletter to drive individuals to your website for more information.





PTA

VOLUNTEERS

TRACKING YOUR HOURS

WHY?

As a record of how much PTA members contribute to school and community

WHAT HOURS SHOULD BE COUNTED?

- Time spent writing PTA agendas, minutes, correspondence, etc.
- Time spent on PTA-related activities at school or within community
- Telephone time regarding PTA business
- Travel time to and from PTA business
- Attendance at meetings, workshops, & other PTA functions
- Convention attendance, except time spend eating and sleeping



THE VALUE OF SAYING “THANK YOU”

- Make recognition a part of your scheduled meeting
- Personal touch is often the best approach
- Handwritten notes are always great
- Acknowledge volunteers in the PTA newsletter
- Plan a recognition event
- Small inexpensive tokens of appreciation can be given (example: candy hugs/kisses...not a PTA expense)





PTA
ISSUES AND CONFLICTS

AVOIDING CONFLICT WITHIN PTA

- Be knowledgeable about PTA
- Be familiar with Bylaws
- Follow the policies of PTA
- Be informed about the issues
- Do not violate the rights of members
- Avoid personality clashes
- Cooperate and communicate with the Principal



IMPORTANT WORDS FOR LEADERS

- I admit I made a mistake.
- You did a great job!
- What is your opinion?
- If you please...
- Thank You!
- We



DEALING WITH DIFFICULT PEOPLE

DO NOT...

- ❖ INTERRUPT
- ❖ BLAME
- ❖ THANK OF WHAT YOU ARE GOING TO SAY WHILE THE OTHER IS TALKING
- ❖ CHANGE THE SUBJECT
- ❖ MINIMIZE THE SITUATION
- ❖ IGNORE
- ❖ JUMP TO CONCLUSIONS



PROBLEM SOLVING AND CONFLICT RESOLUTION

- ❖ Understand the main issues from other person's perspective
- ❖ Understand their perceptions are "their reality"
- ❖ Determine what the other person assumes to be true and valid
- ❖ Identify feeling, not simply to provide venting, but to ensure an opportunity to acknowledge the specific feelings that have prevented the conflict from being resolved.
- ❖ Ask questions and provide opportunities that allow parties to present and clarify their intentions.
- ❖ Understand that when discussing issues, they are describing their needs.



CODE OF ETHICS FOR VOLUNTEERS

- ❖ I will keep confidential matters confidential
- ❖ I interpret “volunteer” to mean that I have agreed to work without compensation in money but expect to do my work according to standards as the paid staff expects to do their work.
- ❖ I promise to take to my work an attitude of open-mindedness; to be willing to be trained for it; to bring to it interest and attention.
- ❖ I realize that I may have assets that my co-volunteers may not have and will use them to enrich the project.
- ❖ I realize also that I may lack assets that my co-volunteers have, but I will not let this make me feel inadequate.
- ❖ I plan to find out how I can best serve the activity for which I have volunteers and to offer as much as I am sure I can give.
- ❖ I realize that I must live up to my promise and be careful that my agreement is clear and simple.
- ❖ I believe that my attitude toward volunteer work should be professional. I believe that I have an obligation to my work, to those who direct it, to my colleagues, to those for whom it is done and to the public.

Name: _____

Signature: _____



Author Unknown

Better Safe Than Sorry...

Please contact your SVPTA Buddy,
Corresponding Board Member, or SVPTA
President **BEFORE** things get too far along.

We are here to HELP...use us!

