



President Snapshot

2020-2021

President Training

Saddleback Valley Council

PTA[®]

everychild.one voice.[®]



Thank You

You are not alone, we are here to support you. You have many resources available to you. The answers to all of your questions can be found in the CAPTA Toolkit, your Bylaws and the President's Survival Guide. If you can't find the answer, we are your 'live-chat' support. When in doubt...reach out!

Thank you for giving your time and energy to help make the PTA the best it can possibly be.

We appreciate your dedication.



President's Role in Nuggets

- Build a team and DELEGATE
- Guide and Serve - not 'dictate'
- You are a facilitator and peacemaker
- Cast a vision, promote inclusion
- Abide by the board and general association votes, regardless of personal opinion
- THANK YOUR TEAM...you can never appreciate them enough!

The purpose of the PTA

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community
- To raise the standards of home life
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth
- To promote the collaboration and engagement of families and educators in the education of children and youth
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

Volunteerism

- All PTA Members are Volunteers.
- Not all members will choose to be actively involved.
- ***Welcome and be open to all members. Be grateful for anyone who wants to volunteer, find their strength & let them apply it.***
- Celebrate your success!
- PTA mission & purpose = work for children
- Have fun!
- Always be respectful of school staff and property.

PTA Structure

- ❖ Units - Schools
- ❖ Councils – Saddleback Valley Council
- ❖ District – Fourth District
- ❖ California State PTA
- ❖ National PTA

Basic policies of PTA

- Noncommercial
- Nonsectarian
- Nonpartisan

See Toolkit for details

Local PTA Leadership

- Executive Board – Consists of all officers and committee chairs as defined by current unit bylaws.
- Committee Chair – Committees are determined by the Executive Board and serve to meet the PTA goals. There are no Co-Chairs in PTA. Committee Chairs are required to attend Board meetings as needed.

President's Duties

- Coordinate work of the PTA
- Set agendas for Executive Board and Association Meetings (give proper notice per your bylaws)
- Preside at Executive Board and Association meetings
- Be an ex-officio member of all committees except the Nominating Committee and Audit Committee
- Appoint Parliamentarian, Corresponding Secretary (as relevant) and Committee Chairs and members (must be ratified by Executive Board)
- Sign all authorizations for payment and contracts (contracts must have 2 executive board signatures)
- Be familiar with financial procedures and requirements

President's Duties - cont.

- Official representative of the Association at Council and other meetings (if you can't attend have a representative from your unit attend)
- Responsible for ensuring the Unit Annual Report is completed
- Meet regularly with site Administrator and to discuss mutual goals for school.
- Ensure Unit compliance with all filing deadlines (check the yearly/monthly to do lists sent to you from Cindy/SVPTA VP)
- Review all flyers/communications prior to distribution. Ensure that principal also reviews and approves items.

Committees

- President is an ex-officio (voting) member of all committees (except Nom Com and Audit Committee) and should be notified of all meetings.
- Detailed planning of events and programs should occur at committee meetings - NOT at Executive Board or Association meetings.
- Committees should report plans to Executive Board before an Association meeting. Chairmen should discuss plans with President beforehand to avoid surprises during meetings
- Contracts need approval by the Association BEFORE they are signed by the president and one other elected officer
 - Sign with PTA name and title first, then name and signature

PTA Planning

- Survey members and analyze previous year's goals and budget. Members include our teachers, please make sure that teachers are asked about programs/especially ones that impact them directly. You want teacher & principal buy in
- The PTA program, budget, calendar, membership plan and fundraising plan must be approved by the association at the first meeting of the year and **before** any plans are implemented. ***These can be revised throughout the year, but must be presented at the board meeteing & approved at the preceeding general association.***

Bylaws...Bylaws...Bylaws...

- All Board Members - Officers and Chairs must read to understand the Bylaws that govern the PTA you serve.
- Elected board members retain a copy
- Bylaws are the general rules of operation for any PTA.
- Official Name
- Membership and dues
- Officers and Elections
- Duties of officers/chairmen
- Bylaws describe Requirements for:
 - Meetings/quorums
 - Being a PTA
 - Amending bylaws/standing rules

Roberts rules of order

Parliamentary Procedure- essential and valuable for the following reasons:

- ✓ PTA business must be handled efficiently and logically allowing for organized discussion and respectful debate.
- ✓ The majority wins but should be properly sought in open transparent discussion.
- ✓ The rights of the minority are protected and respected by allowing for open discussion and expression with respect and thoughtfulness to opposing views.
- ✓ President cannot vote (unless to break a tie)

Types of Meetings

- **Association:**

The association is the voting body for all action taken, including adopting bylaws, adopting the program and the budget for the year, electing the nominating committee, electing officers and approving all contracts to be signed and all expenditures.

The Association must meet a minimum of 3 times a year or per your bylaws.

- **Executive Board:**

The PTA executive board consists of the elected and appointed officers, the principal, the teacher representative and the committee chairmen. The executive board meets monthly to handle the transaction of necessary and detailed business between meetings of the association. The executive board is responsible for accepting and studying recommendations to be presented to the association for approval. The bylaws provide details about the executive board's responsibilities.

Guests may be invited to attend an executive board meeting as well as a meeting of the Association. A courtesy seat is granted by the president to the guests present. A guest may bring information to be shared with the group. However, guests do not participate in discussion or voting and should leave after their information is relayed.

Meeting Agenda

- The agenda is the President's responsibility to create but all should review and approve as the work of the board. The President is required to distribute the agenda to members 10 days prior to the meeting.
- Official business can only be conducted for items on the agenda. Items not on the agenda, brought up during the meeting can be discussed under new business but not voted on.
- Start on time and end on time! This is the responsibility of the entire board all should stay on task and relevant to the work at hand.
- Leave your own personal agenda at the door.
- Review the agenda and all material pertinent to the work outlined on the agenda before you go to the meeting if they are available to you. This way the board can do the work without needing to review the material at the time of the meeting.
- All PTA meetings must have quorum as defined in the bylaws to conduct business. No action can occur without the appropriate number of voting members required

Financial Responsibilities

- This is the responsibility of all members of the executive board to protect the 501(C)3 non profit status of your PTA.
- A letter of determination regarding your units non profit status may be obtained from CAPTA.
- The PTA budget should support the PTA goals established.
- PTA fundraising should be done to meet the goals (3:1 general rule= 3 non-fundraising events for each fundraiser).
- All contracts must reviewed and signed by two board members one of whom must be the president.

PTA Financial Responsibilities cont.

- Never sign a blank check
- Forward per capita membership dues monthly
- All funds counted by two people (not related or residing in the same household)
- No Commingling of funds
- Complete Financial reporting
- Receipts offered for all cash transactions
- Never restrict form of payment to cash ONLY; checks and money orders should be accepted.
- Never take funds home.

How to Handle Funds.

- The Cash Verification Form is used to count and record all money collected for any event. Two people always count the money. One must be a PTA Executive Board Officer or Committee Chairman. The other person will be a PTA member, who is assisting.
- Make a copy of the completed cash verification form for each person who counted cash and one copy to accompany the money. Seal the money in an envelope to be presented to the Financial Secretary or Treasurer for deposit.
- A copy of the Cash Verification Form will be part of your Committee Report, for the event which has just taken place and you will report at the next Executive Board Meeting.



Membership Dues

- All membership dues (not belonging to the unit) collected shall be forwarded to the Council PTA monthly.
- Membership for the California State PTA starts July 1, so membership can be forwarded for the school year starting in July and August. Any time a member joins throughout the year, membership is forwarded to Council, even if it is just one member.

Procedure Books

- A procedure book should contain all materials needed to accomplish the work of the office or chairmanship, plus any additional information that a new volunteer would find helpful.
- Procedure books are created to help a PTA run smoothly and provide each chairman or officer with a record of what has been done in the past.
- Remember the procedure book, as with all PTA materials, belongs to the association. Once a chairman or officer has moved out of a position, the procedure book should then be passed on to the next person filling the position.

Procedure Books- cont.

It is recommended that the procedure book contents be placed in a loose-leaf binder, large enough to hold 8-1/2" x 11" paper.

- The annual budget.
- PTA Calendar for the year.
- Materials from workshops and convention.
- Job descriptions that are updated regularly for easy reference.
- A list of the officers and chairmen with contact information
- A list of resource people and organizations with contact information.
- Current work plans including all fliers sent out for events.
- Previous program correspondence and files so that all officers can look back on their predecessors' work as needed.

PTA Event Checklist

RIGHT AWAY:

Verify that activities comply with Insurance loss prevention guidelines as well as SVUSD restrictions.

- Check the calendar
- Get Principal OK (teachers too)
- Add to PTA Calendar, School Calendar
- Find out the budget for the event
- Program Approved at Association if New Program
- Get contract Signed
- Get Insurance/Hold Harmless signed (if applicable)
- Reserve the right space
- Meet with committee for input & ideas

COMMUNICATIONS:

- Let the teachers know the plan for the event
- Get flyer approval by president and principal
- Distribute flyer in plenty of time

PTA Event Checklist- cont.

1-2 MONTH PRIOR:

- Release funds for the event

ABOUT 1 MONTH PRIOR:

- Submit article for the newsletter
- Present committee ideas to executive board

WEEK OR TWO PRIOR TO EVENT:

- Contact volunteers
- Let custodian know what set up is needed

AFTER EVENT:

- Thank all volunteers
- Complete the event evaluation
- Put together the procedure book
- Submit all receipts to get reimbursed

PTA Communications

- Follow approval process at your unit.
- President and Principal must approve all notes and flyers BEFORE copying or going home.
- Content checklist: What, When, Where, Purpose, Admission free or fee?
- Incorporate the current statewide membership theme and PTA logo in PTA communications
- Do not publish, without written permission, personal information about students or adults. This includes: Photographs, home addresses and/or telephone numbers, email addresses.
- Date all materials.
- Always make it easy for the reader to identify and find the PTA.
- Contact information (units should use school address)
- Most important, include an email address and phone number, so that a member can be reached for more information about the organization and event.
- <http://toolkit.capta.org/running-your-pta/communications/>

Effective Board Characteristics

- ✓ The leadership is appropriate
- ✓ Members have confidence in their leader
- ✓ Growth and welfare of all members are considered
- ✓ Goals are clear and shared by all
- ✓ Group goals are compatible with individual goals
- ✓ Communication is open, frank and non-threatening



Effective Board Characteristics Continued

- ✓ There is a sense of agreed priorities
- ✓ Resources of members are used satisfactorily
- ✓ Goals are high but achievable
- ✓ Decision-making procedures and authority are appropriate
- ✓ Conflict is dealt with openly

Executive Board Must Be Team Players

- Come prepared
- Arrive on time and stay till the end of the meeting
- Be attentive
- Be perceptive
- Help facilitate the discussion by taking an appropriate role in it.
- Be a contributor by:
 - Offer relevant discussion at the appropriate time.
 - Make your point in a clear and concise manner
 - Open to evaluation and constructive criticism
 - Be informative and proactive
- Don't be afraid to disagree
- Don't be afraid to be creative or innovative
- Give other board members the same respect you expect

Closing Thoughts

- You are not the team! You are the leader.
- You don't & can't do everything. If you don't have volunteers for certain roles...reevaluate the program/event.
- Your job is to empower the team and to build future leaders.
 - Set ground rules and follow them
 - Get buy in, build consensus
 - Understand that diversity & inclusion is strength
 - Delegate!!!
 - Ask for help when you need it - don't wait
 - HAVE FUN!
- Remember - We are in it for the kids!! It's all about them, not about us.
- Have an attitude of gratitude!!!!

Time to THINK outside the BOX!

- **Information Highway!** You are a direct line of communication between your school(s) and parents. Strengthen and nurture the bond you have with your school site administration! Let your Principal know you are available to help bridge the communication with your members and the school site.
- **Programs!** Virtual programs still exist! Digital Speakers, Digital Bookfairs and other on-line fundraisers are at your fingertips! Utilize your PTA website or the school website to share those programs and information. Offer educational resources to your members to keep them engaged in PTA!
- **On-Line Subscriptions and Teaching Tools!** There are so many resources for our students, parents, and educators on the Web. Your PTA could help with annual subscriptions or at the very least provide easily accessible links on your website. Curriculum modules are also available and a possibility for educators.
- **Teacher Supplies!** Just because our educators are doing their job digitally does not mean they don't still need supplies! If you have a budget line for teacher supplies.... use it! Ask the teachers what they need to be prepared and successful to teach our students in the virtual realm. Trust us...they still need HELP!

- **Technology!** Unfortunately, not all school districts have the budgets or funds to fully equip our educators with all the technology needed to distance teach. Ask your administration if your PTA can help with the little things...speakers, headphones, wireless mice.... the list is endless! Think accessories and anything else that could help the process run smoothly.
- **Student Supplies!** Not everyone has a school supply cabinet at home! Many of our parents are having to supply their students with additional items to learn from home. That can be expensive! Ask your admin if you could SAFELY support your students with “Supply Goodie Bags”. Prepackaged and ready to drive by pick up! The smallest items make a HUGE Difference!
- **Membership & Advocacy!** Why you ask? Our local district level, but many decisions are made at the county, state, and federal levels. It is vital that we stay connected to decisions made at each of these levels. School funding and school reopening restrictions depend upon decisions made. Some decisions for schools happen at by the governor and state legislature. ***PTA has a LOUD voice due to our membership and reputation to implement policy change!***

Question, Answers & IDEAS

Ideas for 2020/2021:

- Red Ribbon week is Oct 23-31st
 - <https://www.redribbon.org/virtual-activities>
- Virtual Bookfairs
- Pledge Drives
 - make sure & define what your school needs are with teachers/principal
 - remember that you have time, let families/teachers/admin get settled into this new normal that keeps changing
- Read-A-Thon's
- Online Bingo night/after school online bingo
- Not so social ice cream social

.....keep the ideas coming