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WELCOME

President's Workshop

2009 Jeffco Summer
Training

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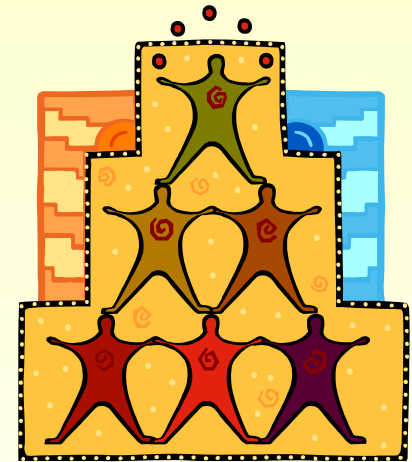
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at
www.jeffcopta.org

Building a Solid Foundation

- President = Team Leader
- Rules of the Game
- Leadership Team
- Planning
- Committees
- Principal and Staff
- Putting Goals into Action



Local PTA Unit

= Chartered legal entity granted non-profit status by IRS under umbrella of Colorado PTA

Members

= shareholders or owners

Mission

= Children

PTA President

= Team Leader and Manager

Protects Assets...

Volunteer, Financial and Good Name

Achieves Goals...

Benefit children and increase family engagement

Team Responsibilities

- = Board as a Whole
- = Individual by Office or Position

Core Requirements of PTA

- = “Unit in good standing”
- = IRS regulations and state laws
- = Insurance company

Leadership Team

Executive Committee

Officers

Principal

Parliamentarian



Board

Officers

Principal

Standing Committee Chairs

Parliamentarian

PTA Foundation

- Effective, cohesive leadership team
- Core mission and focused goals
- Maintain and grow membership
- Thriving, sustainable unit



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Getting Started

*If you don't know the rules,
it's hard to succeed at the game.*

Parliamentary Procedure (aka, Roberts Rules of Order)

= Insures order and respect for all

- Appoint Parliamentarian
- Vote (in tie and by ballot)
- Ex-officio

Parliamentary Procedure continued

Quorum =

Number of members required to be present to conduct business

Majority Vote =

More than one half the votes cast

Bylaws

= unit's governing rules



What do your bylaws say?

Who can see the bylaws?

What can you change in your bylaws?

Standing Rules

- **Outline procedures with specific details that are not included in the bylaws**
- **Must not conflict with bylaws**

For example:

- ★ Bylaws state when the meetings and executive board are held, and perhaps how many are required per year. Standing rules tell where and what time.
- ★ Bylaws give the primary responsibility of officers and chairmen. Standing rules give the specifics

Standing rules are the details of PTA work

Meetings

- Have a purpose. **Share it!**
- Utilize school groups
- Follow and distribute agenda

Conducting a Meeting

Agenda

Call to Order
Minutes
Treasurer's Report
Correspondence
EC or BOD Report
Standing Committees
Unfinished Business
New Business
News from Principal, NPTA,
COPTA and council
Program
Announcements
Adjournment

Hints

- Don't call unnecessary meetings
- Have a purpose and communicate it
- Provide printed agenda
- Keep time to a minimum
- Start and end on time
- Know which committees need to report

Management Style

Leadership Style

- Communicate regularly and listen
- Involve others
- Establish atmosphere of cooperation
- Build consensus
- Show respect and appreciation for ALL
- Ask for help
- You're a role model

You're the chair, not "your majesty."

Administrative Duties

- EXPEDITE WORK of PTA
 - Set goals and prioritize
 - Develop calendar
 - Review progress and evaluate
 - Make sure PTA is represented at
-
- Encourage advocacy

Vice President

- In absence of president
- Assists president
- Performs duties assigned by president
- Strengthens team to achieve goals
- Financial oversight

*What if you have **no or**
multiple vice presidents?*

Secretary

- Minutes at all meetings
- Send meeting notices
- Prepares agendas
- Submits contacts to COPTA
- Maintains membership lists
- Emergency check signer
- Custodian of records
- Copies bylaws for board
- Establishes quorum and counts rising vote
- Financial oversight



Protect your PTA Assets

*The team is in charge of
running a business.*



Financial Management

- Membership approved budget
- Appropriate uses of PTA funds
- Explain procedures to others
- Follow procedures yourself
- 2 signatures on checks, 3 signers on file at bank
- Don't sign blank checks

Financial Management

- No cash payments
- Secure cash and checks
- Accurate documentation
- Prior approval for all expenditures
- Only President signs contracts
- Prompt bank reconciliations, 1 sign-off
- Purchase insurance
- Maintain incorporation

Financial Management

- Remit dues monthly
- Audit Report to COPTA
- Timely IRS filings for ALL units (990)
- No debit or credit cards
- Treasurer's Reports at every meeting
- Years (Fiscal, school, term)
- Fundraising: Follow 3:1 Rule

FUNDRAISING

3-to-1 Rule



For every one (1) fundraiser, at least three (3) non-fundraising projects, programs, advocacy work

Membership

- Membership is everyone's job all year
- Value of membership
- Card = Member benefits
- Budget
- Reach out, diversify
- Reward and thank members
- Remit dues by Oct 15 and Feb 1

Promote PTA

- Use logo
- Brand everything
- Give credit to your PTA
 - Thanks to the PTA
 - Hosted by the PTA
 - Provided by the PTA

PTA is more than a meeting....

Logo and Tagline

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Give yourselves credit!

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Setting Goals & Making Plans



- Up to 3 focused, reasonable goals
- Driven by core mission
- Use *Standards for Family-School Partnerships*
- Motivated by high positive return for children
- Weave goals into everything!
- Communicate them often and loudly
- Share progress

Standards for Family-School Partnerships

= HOW to increase parent involvement

- Welcoming all families into school community
- Communicating effectively
- Supporting student success
- Speaking up for every child
- Sharing power
- Collaborating with community

Committees

- How many do you need?
- Is the work a priority?
- Do you have the capacity?
- Standing vs Special Committees

Types of Committees

Standing Committee

Works in a certain area

Continuous Service

e.g. Membership, Legislation,
Bylaws

Special Committee

Formed for a specific
purpose

When work is done,
automatically goes out
of existence

e.g. Nominating, 10th Anniversary

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What would you want to know?

- List of responsibilities – What?
- Key dates – When?
- Procedures, policies – Do's and Don'ts
- Available resources – Help?
- Budget – How much?
- Expectations – attendance, status reports, chain of command, plan of work – How?

Now What?

- Committees draft "Plan of Work"
- EC reviews
- Determine committee budgets
- EC and committee chairs agree
- Explain "Procedure Book"
- Review and modify as needed

Working Relationships

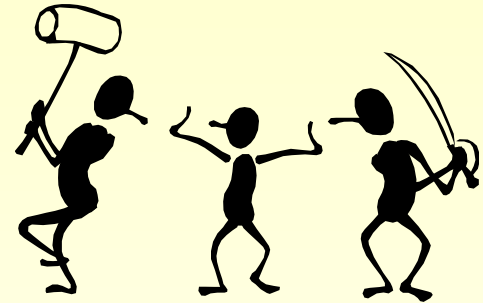
Good = everyone on same page

Bad = sometimes the same book,
different chapters

Ugly = not speaking the same
language

Conflict

- Lose your focus
- Time is wasted
- Feelings are hurt
- Perceptions are negative
- Resources are spent unnecessarily
- Opportunities are missed
- Children pay the price for childish behavior



Principal

Has...

- huge job over entire school
- lives in a fish bowl

Does not...

- run PTA
- manage PTA funds

PTA ≠ manager of school funds

Find Common Ground



- Clarify ground rules
- Know Principal's vision, goals and priorities – not “wish list” of stuff
- Form mutual goals
- Agree on action plan
- Revolve PTA work around goals

Put Goals into Action

- Use *Standards of Family-School Partnerships*
- Weave goals into everything
- Don't reinvent the wheel
- Don't overextend yourselves
- Evaluate and modify

Programs – the Easy Way

2010

Reflections Theme:

Beauty is....

- Reflections
- Healthy Lifestyles
- Take Your Family to School Week
- Let's Fight Flu Together
- School Year's Eve
- PTA More

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Advocacy Always

Colorado PTA

= Collective PTA voice at state level

Jeffco PTA

= Collective PTA voice at county level

Advocacy

- Respond to action alerts
- Publish legislative articles in your newsletter
- Know what you can and cannot do in an election year about ballot issues and candidates
- Recap critical legislative issues for your PTA community

Leadership “Must-Do’s”

- Attend training
- Connect with council
- Use and share resources regularly
- Follow policies, procedures, and the law
- Be fiscally responsible
- Focus on the Mission and your goals
- Be team leaders and role models
- Evaluate

Be patient
Be determined
Set an example

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**“Don’t let the fear of striking out
hold you back.”**

Babe Ruth