



2014-2015 National PTA Official Back-to-School Kit Every Child in Focus

PTA President's Quick Reference Guide





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Welcome & Introduction

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 a part of the rich history of PTA, an association with more than 117 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?

- 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!

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

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.

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. Please take full advantage of all of National PTA’s resources. PTA is one association—local, state and national. Be sure to let your members know the value of their PTA membership.

Be sure to read through all of the sections in the Back-to-School Kit.

Learn how and why PTA speaks for children. Review the Advocacy section of the Back-to-School Kit to learn more about policy, resources, and how you can help children and families. Get what you need to launch an advocacy program or campaign in your community. Effective presidents understand how to speak up for every child.

Grow and retain your membership and mobilize volunteers. Membership Tools are available to local unit presidents and membership chairs to aid and enhance membership recruitment and retention activities. Visit the membership section of this Back-to-School Kit to learn more.

National PTA programs help your school community increase family engagement and support the educational success, health and well-being of children. Learn more by visiting the Programs section of this Back-to-School Kit.

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.

PTAs and PTA leaders gain credibility when they partner with schools and community to increase student success. As a local unit president, it is important that you understand what research says are the most effective ways to involve families in education. To help you learn more and implement effective strategies in your community, PTA developed the National Standards for Family-School Partnerships and resources such as an implementation guide, Power Points, handouts and surveys. For more information,



visit the Programs section of the Back-to-School Kit.

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.

The PTA Mission and Purpose

PTA's mission guides its plans, goals and actions. As part of the PTA family, your PTA plays an important role in achieving the mission.

PTA Mission

The overall purpose of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA has been advocating for children and families for more than 117 years. Our work is centered on our historical purposes which have guided our association through the years.

Historical Purposes of PTA:

- 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, so that parents and teachers may cooperate intelligently in the education of children and youth
- To develop united efforts between educators and the general public that will 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 COMMITTED to the educational success of children and the promotion of family engagement in schools.

The PTA difference is directly related to the quality of the association, its mission, its history, historical purposes, 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) 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 by focusing 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 (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

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 (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.

National and State Contacts and Relationships

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

At the local level, Parent Teacher Associations (PTAs), Parent-Teacher-Student Associations (PTSAs) and SEPTAs (Special Education PTAs) form a nationwide network of members striving to meet the needs of children and youth in their own communities. PTAs can be found in pre-schools, elementary, middle and high schools and even in charter schools and private schools. Some PTAs are not associated with schools and are, instead, community-based and address the needs of the entire community.

Region/District/Council

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 54 congresses representing all 50 states, the District of Columbia, the US Virgin Islands, Puerto Rico and Department of Defense Schools (DoDS) in Europe.

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.

Structure of PTA

We are all in this together. Make sure you submit the names and contact info of your local officers and board to your state PTA. They will share this info with us. Over the course of the year, much information and assistance will be offered to you. However, no information can be shared if we do not know how to reach you.

Note: PTA does not share unit leaders' contact information with anyone outside of the association.

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, email, or in person. Just ask!

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 the proper response.

[Find a web directory of all PTA state offices.](#)

National PTA

1250 N. Pitt Street

Alexandria, VA 22314

Toll-Free: (800) 307-4PTA (4782) Email: info@pta.org

Website: PTA.org



You can connect with PTA and its leaders through:

[Facebook](#) - Become a fan” of the Parent Teacher Association on Facebook to get updates and connect with other fans.

[Twitter](#) - Follow @NationalPTA on Twitter for updates on education-related issues and PTA efforts.

National PTA messages—Hear more from National PTA through the PTA [One Voice Blog](#) and [YouTube](#) channel.

[Pinterest](#) - Follow National PTA on Pinterest for the latest ideas.

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

Running Your PTA

Roles and Responsibilities of a PTA President

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 and raise funds.
- Support membership growth and retention.
- 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.

As a new president, you should immediately 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 the outgoing president and officers. What worked last year? What did not? 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.
- 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 should be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA. Your state PTA can help.
- 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 fresh 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 IRS 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 for filing in the coming months. 990s are due on the 15th day of the fifth month



following the end of a fiscal year. If you believe your unit missed one or more filings in the past few years, contact your state PTA immediately for assistance.

- 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 PTA's accounts.
- Ask your state office if you are required to have insurance and when the payment is due. It is important to protect yourself and your board members by having insurance.

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.

Roles and Responsibilities of PTA Officers and Board

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. Information about the basic roles of each of these officers is in your bylaws and in the additional resource section of this guide. 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 your PTA's goals.

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

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. Remind them to review the Quick Reference Guides also.
- 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—that means saving reports, files and notes.
- Utilize your nominating committee to elect your officers each term. Information about your nominating committee can be found in your bylaws and/or standing rules.



- 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 of your members, the community, administrators and teachers 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 the additional resource section of this guide.
- Ensure communication channels are open. 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 board. Boards are entrusted with the PTA's work by the members. Important to note: The executive committee is *not* the board of directors. Your unit's board structure is defined in its bylaws.

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.

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.

Board members should:

- 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.

Board members should:

- 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.

Board members should:

- 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 of and refer to your unit’s bylaws. Follow those bylaws.
- Know the current state and national bylaw content.
- Understand his or her basic responsibilities.

Strong boards understand their responsibilities. Consider sharing the Board Responsibility Checklist (available in the additional resource section) with your board members and asking all board members to take the [boardsmanship e-learning workshop](#). You will need to log into the National PTA website using your membership card activation username and password in order to access e-learning.

Officers also have basic roles and responsibilities. For more information on the role of the vice president, treasurer and secretary, refer to the additional resource section of the online kit. A good working relationship with the other officers in your unit is essential for a successful PTA year. Be sure to communicate regularly.

Role and Responsibilities of Committees

Committees: How They Work and Their Relationship to the Board and President

Presidents and officers should never do it all. Committees are a way to share the work. Committees are also a vital part of a PTA and are a great way to develop new leadership. 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 are charged with a specific task and 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 with the additional resources.

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. Your local unit bylaws should provide guidance in how to form a committee.

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. Local unit bylaws will explain how committee chairs are named.

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; and
- Seeking member and board approval before taking any action (including distribution of public notices).

Nominating Committee and Elections:

A Nominating Committee is a PTA's most important committee as it helps ensure your unit's future. Your unit's bylaws will define how and when this committee is elected (*never* appointed) and when it reports the slate of candidates. Board service is not an entitlement. Who is on your board—and who serves as an officer—are very important. Nominating Committees must be deliberate and selective as they vet and choose candidates. If your PTA does not have a process in place for identifying, interviewing and selecting potential candidates, consider the Sample Interview Questions, Sample Application Form and Sample Board Checklist in this kit.

Elections are held as outlined in your unit's bylaws. If you have questions about elections, consult [Robert's Rules](#) or your state PTA for assistance. A well-run nomination and election process maintains your PTA's credibility in your community and assures members that their PTA is in capable hands.



President's Role in Managing 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 maintaining tax-exempt status and ensuring 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

Both of these areas require creating a good working relationship with the treasurer and a good working knowledge of finances and financial reporting.

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 about PTA finances. While it is a good idea to share these materials with your local unit treasurer, you should consider sharing the entire guide with your board. These materials are available online. The Finance Quick Reference Guide explains what a PTA leader needs to know about money management. Even if many financial assignments are delegated to the treasurer, 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 the Finance Quick Reference Guide is a good way to begin.

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.
- Help the treasurer get receipts for every expense and require receipts for reimbursement of expenses.
- Make sure that your insurance payments are paid in a timely manner.
- Make sure receipts are written by the treasurer when money is received by the PTA.
- Make sure your unit has a procedure for counting money (e.g., from a fundraiser) that includes two people and a signed receipt documenting the amount.
- See that 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).
- Ensure appropriate financial records are kept on file including receipts and invoices.
- Verify that minute reference expenditures are kept on file.
- Check to see that bank statements are reconciled monthly immediately upon receipt by the treasurer.
- See that dues are paid on time.
- Ensure books and records are reviewed annually.

Financial Management Tip:

For the position of treasurer, seek a volunteer who is a CPA, a bookkeeper, a tax preparer, or even 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. Be sure to direct the treasurer to the Finance Quick Reference Guide for support and guidance.

Partnering with Teachers and Administrators

While PTA is an independent association and some PTAs exist outside of school buildings, the majority of PTAs serve one or more schools. 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.

PTA leaders are responsible for running their PTA as well as oversight of PTA's programs and resources, administrators are responsible for the school site and oversight of education, and teachers are responsible for individual classrooms and curriculum delivery. Together these groups make a powerful team. As with all teams, relationships are the key. Collaborating and working with administrators and



teachers takes thought and time. Consult the resources available in this kit for the “Dos and Don’ts” of working with teachers and administrators.

A good way to work collaboratively with teachers and administrators is through PTA’s [Schools of Excellence program](#). Consider registering for this program, identifying a goal, forming a team, and improving school climate in partnership with the community and the school.

Remember: 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—they can raise awareness and raise voices. Create powerful partnerships to support student success.

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 (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.
- 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.
- 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.
- Common Core State Standards – This initiative is a state-led effort that established a single set of clear educational standards for kindergarten through 12th grade in English language arts and mathematics that states voluntarily adopt. PTA has many Common Core resources for [parents](#).
- Title 1 – Provides federal funding for high poverty schools to help students who are behind academically or at risk of falling behind.



Partnering with Your Community 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:

- Creating a joint project with a local hospital, health care provider or health club to increase physical activity and wellness for children and families, develop healthier eating or exercise habits, or increase awareness of obesity-related issues.
- Partnering with a community group to apply for a grant to further mutual goals around family engagement or health and wellness issues.
- Including a community partner in your plans as you apply for one of [PTA's grants or awards](#). Collaborating with the local faith community to get out word on the importance of family engagement in student success.
- Cooperating with local businesses to create internships or to identify resources for families.
- Collaborating with community-based agencies or associations to identify service opportunities for students and families.

Planning Your PTA Year

Leadership Development and Transition

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. Start planning now for your own smooth transition out of office. 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. As the president, you play a vital role in both areas.

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.



Consider providing opportunities for board members to become potential next presidents by:

- Asking them to join you in a meeting with teachers, the principal or the superintendent.
- Assigning them to attend a meeting on your PTA's behalf.
- Giving them an opportunity to take the lead on building a relationship with a new partner or sponsor.
- Allowing them to attend state or council leadership conferences and trainings.
- Encouraging them to take one or more National PTA [e-learning courses](#) to develop and reinforce skills.
- 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/outgoing 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. that 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 that 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.



Goal Planning

One major role of a board is to develop short- and long-term goals and create plans to achieve those goals. The local unit president plays a key role in ensuring planning occurs. 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. 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 with this guide.
- List the types of activities for consideration.
- Develop objectives for actions based on the results of your needs assessment. Prioritize ideas and select the two or three that best meet the board's goals.



- Develop a calendar for activities and assign committee responsibilities.
- Propose your plan for meeting the objectives at a PTA meeting. Invite all school staff, parents, and appropriate community members to attend.
- Vote on the adoption of the plan and incorporate your PTA's goals into your annual calendar.
- Create a plan to raise funds to support your plan of work and achieve your goals.
- Evaluate the activities using measurable outcomes.
- Report your success to your PTA members and to your community.

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.

Objectives Checklist

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

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 by June 2014.

Specific

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

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?

Use the sample Goal Planning Guide to help you develop your goals for the upcoming year.

Plan of Work

What is a plan of work?

A plan of work contains the action steps necessary to achieve the goals of a PTA. The plan of work guides the unit's activities for any given fiscal year. Committee chairs also prepare a plan of work (which may need approval of the executive committee or board, so check your bylaws) for their committees. All plans of work should align with PTA's mission and help PTA achieve its goals for the year.

How is a plan of work put together?

Using your PTA's goals, identify specific strategies your PTA or committee will use to achieve a goal and then create a step-by-step plan for each strategy. Ensure that someone is responsible for each step of the process and that a reasonable timeline is created. For example, if your PTA's goal is to increase literacy, one strategy may be to start a parent-child book club. The steps may include identifying a chair, creating a reading list, identifying community partners, planning a year end celebration, etc. Another literacy strategy in the plan of work may be to advocate for a full-time school librarian and steps may include a letter writing campaign, school board meeting attendance, research of staffing and impact on literacy, planning a rally, etc. Further in this section you will find an example of a committee plan of work template recommended by Texas PTA, available in the additional resource section.



Effective Meetings and Important Rules

Effective Meetings

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 or committee or 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 and they have the privilege of introducing motions and voting. These privileges are limited to members of your PTA. To ensure that you are covering everything in your meetings, take the [PTA Basics course](#).

For best results, schedule meetings that are convenient for your membership, stay on task, and start (and end) on time. If the attendees feel something significant was accomplished and their time was valued, they will come back. Poll members to find out when is the best time to hold a meeting. You will increase your members' participation if the meetings are held at a time that is convenient for the majority of members. If yours is a school-based unit, consider meeting outside the school building in order to attract parents who might not be comfortable in a school setting.

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 primary role of the president during meetings is to act as facilitator, to organize and conduct the business of the PTA. Good meetings stay on track, follow an agenda, and run smoothly so that all members feel welcome and able to participate. Effective facilitators are viewed as fair and unbiased. Build your [parliamentary skills](#) and learn more about effective meeting facilitation.

A sample meeting agenda and guidelines for facilitation are provided in this guide.

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.

The president controls whether a meeting gets side-tracked, is dominated by one individual, loses focus, or 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.

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, 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 treasurer's report should be attached to the minutes. The minutes also should include a sign-in sheet or other record of attendance. Remember, if it is not in the minutes, it did not happen. Minutes do not include opinion, lengthy descriptions of discussions, or detailed quotes from speakers. To ensure proper minutes are kept, you and your PTA's secretary should consider taking the [Secretary's e-learning course](#).

A minutes sample is included in this guide.

Frequently Asked Questions about Meetings

Do we have to meet? How often?

Check your bylaws for a minimum number of meetings that must be held each year. If you have no reason to meet and bylaws allow you to skip the meeting, do not set up the meeting.



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 vice president 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. If the topic is one that requires more time and thought, perhaps appoint a special committee or task force to research the topic and recommend a course of action for the next 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?

Clearly state each motion before voting on each item, and clearly state the result of the vote. 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.

Parliamentary Procedure

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
- Attention given to all perspectives
- Ability for each member to provide input
- Majority rule
- Maintenance of the rights of the minority

Basics for Presidents

There should only be 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.

To help you and your board feel comfortable with Parliamentary Procedure and use it effectively, consider taking the [Parliamentary Procedure](#) e-learning course.

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

Bylaws

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 your bylaws. Your entire board should have their own copy.

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
- Directions for making, amending or revising the bylaws

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.

Your state PTA will provide bylaws assistance, so ask for help if you have questions about updating or revising your current bylaws. Most state PTAs provide fillable electronic forms or electronic templates to make revision easier. For a suggested bylaws checklist, see the additional resources section.

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. Standing rules may be changed from administration to administration or from meeting to meeting. Some state PTAs



require units to have standing rules or may have standing rule templates, so check with your state PTA office.

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

- Bylaws usually state the number of meetings an association must hold or the group responsible for setting the meeting calendar. 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.

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. Bylaws changes—both revisions and amendments—usually require both notice and a two-thirds majority vote. Comply with the specific requirements of your current local unit bylaws. If you have any doubts, contact your State PTA for assistance.

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. This number should be noted in your unit's bylaws. If a quorum is not met at a meeting, then business cannot be transacted. 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.



President's Role in Growing Membership, Volunteerism and Advocacy

PTA is a membership association. 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 PTA officers and 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.

As PTA president, you should:

- Talk to your state PTA about how and when your unit receives its membership cards.
- Identify state and national programs and resources that will help grow membership.
- Tap into ready-made resources available through organizations in the PTA MORE (Men Organized to Raise Engagement) alliance. All are dedicated to raising the level of involvement between children and the important men in their lives.
- Educate yourself about special offers and member benefits provided through PTA National Member Benefits Providers. Look for more information in the Fundraising Section of the Back-to-School Kit.
- Review the Membership Quick Reference Guide and share it with your board.
- With the Membership Chair, lead membership recruitment activities and challenge your board to be fully involved in recruitment as well. If you show you care, others will follow.

Attracting and Keeping Volunteers

As the local unit president, it is important that you 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! You can find ways to recruit and reward volunteers, through PTA's [Three for Me program](#). This program encourages parents to volunteer just three hours a school year.

Volunteer recruitment should be a carefully planned activity. Assign a volunteer chairperson to oversee volunteer management and to work in partnership with your membership chair. If your PTA does not



have a volunteer chair, ensure the following things happen in order to maintain a steady stream of volunteers and potential leaders for your PTA:

- Make contact with every person who offers to volunteer, even if you have more volunteers than you need for any given event. The fastest way to lose a volunteer is to ignore their offer of time.
- Match volunteers to potential jobs based on their skills.
- Arrange for general orientation of all volunteers, and ensure that training and mentoring is available for those who need support.
- Help volunteers become familiar with school policies, people, programs, and the school building itself.
- Provide a variety of experiences for volunteers, and provide opportunities that appeal to all types of volunteers including those that involve families or can be done outside of school hours.
- Track what projects volunteers worked on and time spent.
- Seek feedback. Did the volunteer have what he or she needed to do their job? If not, what was missing?
- . 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

Remember: Your board members are volunteers. Your committees run on volunteer power. It's easy to forget that some of your PTA's hardest working volunteers serve with you on your board. Show that you value their efforts. Maintaining a current volunteer is easier than finding a new one. Happy board members will help recruit new board members.

- All volunteers need: Encouragement.
- Respect.
- To feel wanted and needed.
- Help and direction.
- Praise.
- Meaningful and manageable assignments.
- Recognition and appreciation for their efforts.

Visit the [PTA Store](#) at for recognition gifts. Make sure volunteers are contacted throughout the year.



Frequently Asked Questions about PTA Volunteers

Who can be a volunteer?

Anyone. A volunteer does not have to have a child in school to volunteer. (If a volunteer steps forward to assist as an officer of your PTA, check your bylaws for any experience criteria necessary to hold an office.) But remember that the safety and security of all students should be a priority for PTA.

If yours is a school-based unit, follow school policy about volunteers and background checks. 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?

You and your board are PTA ambassadors. Be a spokesperson for your PTA. Tell others what a great PTA you have, your goals and your achievements. Ask people to volunteer and help your PTA achieve more for all children and families. PTA volunteers can be found anywhere:

- At work
- At senior centers or retirement communities
- At the student union building of a local college
- At fraternal organizations, civic groups and women's clubs
- At a chamber of commerce luncheon
- In a high school class, club, or organization

Tip: Ask for volunteers at the close of a successful PTA event. Introduce yourself, thank everyone for attending this PTA event, and say something like, "If you enjoyed tonight's Ice Cream Social, please consider volunteering two hours next month so we can do it again."

Tip: Be specific. If you need two hours, say it. If the job can be done at home or with family, say it. 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. Federal (and some state) law provide some protections. However, if someone was injured because of a volunteer's willful and wanton misconduct, including the influence of drugs or alcohol, this protection does not apply. Insurance policies may provide additional protection. Local unit



presidents should understand all state laws applying to volunteers and, if your unit carries insurance, check with your state PTA or insurance carrier for liability limitations.

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

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

While federal policy may seem far removed from your day-to-day role as local unit president, what happens in our nation's capital has a profound impact on states, districts and local schools and all children and families. PTA's legacy of more than one hundred years includes the creation of universal kindergarten classes, child labor laws, school lunch programs, a juvenile justice system, and local school wellness policies.

Familiarize yourself with National PTA's [public policy agenda](#) and the tools available to you to learn more. Consult the Advocacy section of the Back-to-School Kit to learn more about PTA's resources, information streams, tools, and training so you can lead your PTA through federal issues.

Take advantage of the knowledge and experience of your state PTA's Federal Legislative Chair (FLC). FLCs have regular conference calls and work with the state PTA to ensure that all units know what is going on in D. C. Along with national leaders and state board members, FLCs develop relationships with federal legislators and can be a good resource for your PTA.

Local unit presidents can influence federal policy by:

- Encouraging your 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. Your State PTA can help.
- Inviting Members of Congress and/or their staff to site visits or host training on federal policy, utilizing the FLC as a resource.
- Writing a letter to the editor of your local newspaper related to federal policy.



- Attending the National PTA Legislative Conference.
- Considering naming a Federal Legislative Chair for your local unit.

Advocating for State and Local Policy

State legislation impacts your community's families and schools. Often state-level advocacy is necessary to secure adequate funding for education. Local school boards and committees make policies that impact every child.

Local unit presidents can influence state and local policy by:

- Working with state legislators to influence legislation.
- Attending school board meetings.
- 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.
- Writing a letter to the editor about the importance of family engagement in education.
- Attending your state PTA's Legislative Conference.
- Naming a state legislative chair for your local unit.
- Naming a school board liaison for your local unit.

Thank you for all you do for PTA. Your community benefits from your willingness to volunteer and lead. Children and families everywhere are better off because you do what you do.