

## Be a Good President from the Start

- Start by acknowledging the good work that's already been done.
- Figure out how things work before you start implementing change.
- Ask other officers and volunteers what they think—the team is better if all members have been a part of the decision-making.
- Communicate your expectations by letting others know what you want from them and listening to what expectations they have.
- Motivate other team members to do the best job possible.
- Be a leader and let others on the board handle their own duties and responsibilities. If someone seems to be struggling with a position, meet and discuss what can be done to help.
- Walk the Walk—do what you say you'll do, respect the opinions of others, be honest, show gratitude, and recognize good work.
- Take responsibility—acknowledge if an error has been made. Make certain that responsibilities are clearly outlined and that each person is doing his/her share.
- Keep the communication channels open at all times and in all directions (among administrators, teachers and staff, parents and volunteers, and PTA officers). A strong team is an informed team.



## Responsibilities of Officers/Chairmen

All board members and chairmen are expected to:

- Accept office or position only when willing to uphold the policies and procedures of the State and National PTA;
- Accept office only when willing to prepare oneself to fulfill the responsibilities of the office;
- Study and follow unit bylaws and standing rules;
- Attend and participate in meetings;
- Review and maintain the procedure book and files for the position;
- Abide by the will of the majority;
- Respect the privacy of the business of the executive board;
- Protect the privacy of all members by not allowing distribution of membership lists to outside interests;
- Meet deadlines and fulfill assignments promptly;
- Give accurate and detailed account of all monies entrusted to them;
- Delegate instead of doing it all yourself;
- Develop and strengthen leadership;
- Attend conferences, workshops and conventions;
- Ensure a good transition by passing on all resources and records; and
- Resign if unable to perform the required duties of the office.

### **The California State PTA does not recognize co-officers.**

“Co-officer” implies two people of equal rank sharing one position. In PTA, only one name may be listed for each office, and only one individual may vote. Bylaws may be amended to include additional officers to share the workload.

**The bylaws provide the month for the annual election and the date when the term begins.** All officers and chairmen are obligated to study and follow PTA bylaws and standing rules. They are also responsible for reviewing, as well as maintaining while they are in office, the procedure book (Procedure Book 2.3.4, 38) specific to their office.

## TYPES OF PTA MEETINGS

For each PTA, various groups are assigned specific functions and each group has particular authority to act and fulfill the assigned obligations.

***PTA bylaws specify the frequency of executive board and association meetings, how special meetings may be called, and the quorum requirements.***

### **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. PTA members vote at an association meeting.

### **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 every month 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 membership. 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.***

### **COMMITTEES:**

A committee may be a standing committee with regular, ongoing responsibilities during the PTA year or it may be a committee organized for a short-term activity only. Committees meet to make recommendations to the executive board concerning the assigned activity. A guest may be invited to a committee meeting to present information.

### **MINUTES:**

***The meetings of each PTA group should be preserved through the recording of minutes. Each group's meeting is different and different minutes are required. The board meeting cannot be combined with the association meeting.***

## Twelve Things TO KNOW OR DO

1. Every PTA must submit membership dues through channels for at least the required minimum number of members. Dues must be received in the state PTA office by the December deadline.
2. Every PTA must submit through channels a yearly insurance premium, a workers' comp form, financial reports, and annual report of volunteer hours by the due dates.
3. Every PTA must now file annually with the IRS and the State of California. If your PTA's fiscal year ended on June 30th, the due date for filing is November 15th.
4. Have at least the minimum number of officers as required by the IRS (president, treasurer and secretary), and make sure that their contact information has been forwarded through channels so that they receive the support, resources and information to which they are entitled.
5. Convene at least 3 general meetings per year: early in the PTA year to adopt the budget, annual financial report, year end audit, program(s) for the current year; mid-PTA year to elect a nominating committee and adopt the mid-year audit; early spring to elect officers for the next year.
6. Present a budget for adoption by the membership at the first general/association meeting. Spend money only as approved by the membership at a general meeting and properly recorded in minutes of the PTA.
7. Obtain two authorized signatures on all checks and have receipts for every payment of any kind. Never pay bills or reimburse with cash.
8. Undertake activities only as approved by the membership at a general meeting and after properly recorded in minutes of the PTA.
9. Follow PTA insurance guidelines for appropriate PTA activities as summarized in the red/yellow/green light section of the *Insurance Loss and Prevention Guide*.
10. Review the bylaws at least once per year. Having the executive board review them together is a great way to orient everyone to the requirements and timelines of their positions. Update at least every third year.
11. Perform audits twice a year, January and July, or according to the bylaws, and submit copies of your adopted financial reports (audit reports including audit checklist and recommendations, year end financial report, budget) through channels.
12. Work together - parents, principals, teachers, and staff are all one team!

## **President**

### **Doing the job - month by month**

#### **Upon Election/Summer**

Officers/Chairmen attend training opportunities provided by state, district and council PTA.

Work with predecessor to understand job responsibilities.

Preliminary budget prepared, get authorization for summer expenditures

Distribute PTA materials to the appropriate officer/chairman

Be sure officers/chairmen receive procedure books

Prepare for back to school activities

Prepare for budget meeting

Check with council/district for meeting schedules and training opportunities

Forward board list with full address and contact information of president through channels

Work with outgoing board to ensure smooth transition

Set goals

Board-elect develops and adopts preliminary budget for the upcoming year.

Present budget to the membership for preliminary approval at last association meeting of the year

Review bylaws with new board

Check with council/district for meeting schedules and training opportunities

Verify how to receive the summer mailing from National PTA

Read State PTA service mailing and share with board

#### **September/October**

Prepare for the first association meeting; remind officers of their roles in the meeting.

Secretary needs to have minutes from prior association meeting for approval,

Treasurer needs to present budget and treasurer report,

Auditor needs to present audit of the preceding fiscal year.

Remind treasurer to remit per capita monthly with proper paperwork

Re-present budget, final financial report for preceding year and audit to association

Forward through channels

#### **November/December**

Forward proposed resolutions in time for action by council/district

Remind treasurer to remit per capita, insurance and Workers Comp forms

File tax return by November 15 (depending on fiscal year)

Financial officers should be preparing for the audit

## **January/February**

Conduct election of nominating committee at an association meeting  
Prepare for Founders Day program; may include Honorary Service Award presentations  
Remind treasurer to remit final per capita through channels to meet the membership year-end  
Begin planning for convention representation; delegates are elected by the association.

## **March/April**

Conduct the election of officers at the annual meeting  
Work with the historian on the Annual Historian's Report  
Begin transition with president-elect

## **May/June**

Remind treasurer to remit final per capita through channels to meet the membership year-end  
Prepare for the final association meeting  
    Motions for executive board to pay summer bills  
    Appoint committee to read and approve minutes of last meeting  
Present procedure book to president-elect; follow up with officers/chairmen for same  
Work with the president-elect to plan an installation.  
Be available for advice - when asked