

**West Virginia**  
**PTA**<sup>®</sup>  
*everychild.one voice.*<sup>®</sup>

# Incoming Presidents' Guide

*“A Reference for Getting Started”*



*Adapted from Georgia PTA*

August 2016

Congratulations on your election as a local unit PTA president! You can be sure of its importance to every child in your school and community. Being a PTA president brings a great deal of responsibility as well as many rewards. You will learn that serving as PTA president is a wonderful experience—an enriching, time-consuming, fulfilling, sometimes frustrating, and priceless opportunity—for you as an individual, as a leader, and as a member of your community.

This guide for incoming presidents is written to give you some guidelines about how to get started. It is not comprehensive instructions on how to complete your term successfully. It is just a starting place. Be sure to use the National PTA Back to School Kit for additional information by visiting [www.ptakit.org](http://www.ptakit.org).

## **WHAT YOU SHOULD KNOW ABOUT PTA**

To lead the PTA with confidence, an officer or committee chair must first understand the PTA's purposes and policies. The PTA is a national nonprofit organization that has dedicated itself to advancing the well being of children, youth, and families for more than 100 years. PTA is an advocacy organization speaking for every child. The Purposes of the PTA give the organization its vitality and vision.

| <b>Purposes of the PTA</b>   |
|--|
| <ul style="list-style-type: none"><li>• To promote the welfare of children and youth in home, school, community, and place of worship.</li><li>• To raise the standards of home life.</li><li>• To secure adequate laws for the care and protection of children and youth.</li><li>• To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.</li><li>• To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.</li></ul> |



***PTA's are organized primarily at school sites, but remain independent of the school and the school system.***

Each PTA unit's work is determined by the needs of its community and the interests and concerns of its members. Responding to local conditions, PTA's across the country have made their voices heard at school board meetings and sessions of the legislature in favor of funding for purposes such as arts education, improved school libraries, and removal of asbestos from schools. PTA's have led community campaigns to build child abuse shelters, sponsored parent education programs, provided service learning opportunities, and involved parents of at-risk children in the PTA and the schools. The strength of the PTA lies in its advocacy and its ability to implement such programs and projects.

PTA's in good standing are granted non-profit, 501(c)3 status by the IRS and are non-partisan, non-sectarian, and non-commercial associations. In other words, PTA's don't

endorse political candidates or parties, are not religious nor do they endorse products, services, or companies.

By being a PTA, you are part of the National PTA and join 4 million members nationwide in working for the health, safety, welfare and education of all children. Each local unit is also part of the West Virginia PTA, which has over 5,500 members! The state and National PTA supply units with information and resources that help them contribute to the nationwide effort to improve the well-being and education of every child. PTA regions and councils within West Virginia further support local units to create a closer connection at the regional or local level.

## **NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS**

**Standard 1: Welcoming all families into the school community**—Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

**Standard 2: Communicating effectively**--Families and school staff engage in regular, meaningful communication about student learning.

**Standard 3: Supporting student success**—Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

**Standard 4: Speaking up for every child**—Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

**Standard 5: Sharing power**—Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.

**Standard 6: Collaborating with community**—Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

For more information about the National Standards and PTA programs that promote family-school partnerships, visit [www.pta.org](http://www.pta.org).

Your PTA and everyone in your school community can use the National Standards as a guideline to direct their work. This tool helps you assess parent involvement, set goals, develop action plans and evaluate progress. By working with administrators, staff and your community, your PTA and school can move from discussion to action in developing dynamic programs and a school environment that lead to improvement in student achievement through comprehensive parent involvement.

## **GETTING STARTED – What do I do first?**

Take a deep breath! Get a cup of coffee (or tea) and read this guide. Gather the materials listed herein and then bring your officers together to plan for the coming year.

Remember to take it one step at a time. It may seem like there is a lot to do – the first step is most often the hardest. Your council, region and state PTA are there to help you, too. Call them if you need their guidance, support, or reassurance.

- Talk with the outgoing president about the PTA’s status and seek his or her recommendations.
- Verify that the outgoing secretary has submitted a list of incoming officers to the state PTA immediately following the election. They can complete and return the “Local Unit Officer List Form” found in the Local Unit Packet or visit the State PTA website and complete on-line ([www.westvirginiapta.org](http://www.westvirginiapta.org))
- Meet with the principal to find areas of common interest and concern. Learn about the school’s goals and share your objectives for PTA. Establish a good working relationship right from the start by opening a channel of communication.
- Call a meeting of newly elected officers to approve the appointment of a parliamentarian, determine how planning will be conducted, identifying priorities and setting goals. Decide what committees you want to have in place for the coming year.
- Identify and elect committee chairmen.
- Make opportunities available to your officers and committee chairs to attend training and leadership development events offered by your council and state PTA. Stress the importance of attending convention next April. Check to insure that the current budget covers attending convention for at least your newly elected officers. If not, request that the budget be amended before school starts.
- Thank the outgoing officers and explain how their continued service would be of help as you plan for the coming year.
- Make sure that an audit of your PTA’s books will be properly conducted at the end of the outgoing officers’ term, that signature cards are changed at the bank, and that IRS reports are filed when due. (Don’t panic if you don’t understand what this means. See PTA Money Matters and Financial Management Section of this guide for more information.)

## **Seven Steps to Help You to COMMUNICATE**

1. Take the time to talk with your officers to ensure that they are clear on their responsibilities. Communication promotes teamwork, efficiency and reduces misunderstandings. (The duties of each officer are defined in your bylaws.)
2. Ask your officers to do the same upfront work of clarifying expectations and goals with board members/committee chairs with which they will be working.

3. Communicate with the membership throughout the coming year. The more members know about the PTA's goals and activities, the more involved they will be.
4. Don't ignore problems. It is easier to address a small issue, dealing with a few people, than it is to clean up a larger one that affects many.
5. Do not hesitate to ask questions. You are not expected to do the entire job alone. Your council, district and state PTA are here to help you.
6. It is your responsibility to keep your officers and principal informed. You should give copies of this guide, other mailings, and appropriate sections of The Local Unit Handbook to your officers, principal and committee chairmen.
7. Stay in touch with your principal.

Enjoy yourself! The year will go 100 percent better for you and everyone if you and your members have fun while you are working. The work is important, but that does not mean it should not be gratifying, and enjoyable. There are many rewards to PTA work, and pleasure in the efforts you are making on behalf of children should be one of them.

### **For Your (Required) Reading Pleasure**

The following is a list of the documents that are needed to run the PTA effectively. Make sure you have them when you and your board begin your planning for the coming year. If any of these important documents are missing, work with your predecessor and other members to replace or recreate them. If you need help, contact your council, region or the state office.

- List of local PTA board members, addresses, phone numbers and e-mail addresses
- Latest membership roster
- Set of newsletters for at least the past year
- Set of minutes for last two years' board and membership meetings
- Treasurer's reports for at least the past year
- Audit reports for at least the past year
- Set of correspondence from the past president
- List of community partners, projects, contact people
- Current local PTA bylaws
- Local PTA procedure book for the PTA president
- Last year's PTA reports and/or plans of work and results
- Last year's budget
- Last year's calendar of events/activities
- National PTA's Back-to-School Kit 2016-2017 ([www.ptakit.org](http://www.ptakit.org))
- National PTA's Standards for Family-School Partnerships
- West Virginia PTA Local Unit Handbook 2016-2017

## FREQUENTLY ASKED QUESTIONS

### What is the mission of PTA?

PTA is a strong advocate for public education, a relevant resource for parents and a powerful voice for children. The children are PTA's focus, and we speak for every child.

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

The Mission Statement and other resources are available in foreign languages on the National PTA website: [www.pta.org](http://www.pta.org).

### What is the PTA logo and tagline?

As part of an image campaign, National PTA adopted the tagline "*everychild, onevoice*" to create a stronger unity among constituent PTA units nationwide. This tagline should be used by all PTA's as frequently as possible on all materials. Refer to the National PTA website for instructions regarding the PTA logo.

### What is a local unit ID number? How can I find out what our Local Unit Number is?

National PTA assigns a Local Unit Number when a unit is chartered. This number is used for record keeping purposes by the state and National PTA and is listed on address labels on correspondence from National PTA. If you cannot find your Local Unit Number, contact the state office at [office@westvirginiapta.org](mailto:office@westvirginiapta.org).

### What is the difference between region, council and local unit PTA's?

- A **local unit** is a self-governing PTA unit that plans programs and activities to meet the needs of children and their specific school community.
- A **council** is a group of two or more local unit PTA's organized by the state PTA for the purposes of training and coordination of the efforts of local PTA's. Your PTA may or many not be part of a council; it will depend on where you are located.
- A **region** is a geographic division of the state PTA established for convenience in administering programs and projects, and providing representation on the state PTA board. There are seven regions in West Virginia

### What are bylaws?

The bylaws are the most important document of your PTA and contain the specific rules for governing the organization. They are adopted by a vote of the members at a general meeting.

### **What is in the bylaws?**

The name of the association, articles and purpose of the organization, basic policies, qualifications for membership, rules for officers, executive board, meetings, committees, and running the PTA. If you cannot find an answer in your bylaws, you should refer to Roberts Rules of Order.

### **How are changes made in the bylaws?**

- If changes to bylaws are to be considered, a committee should be appointed to study the proposed changes and to make recommendations to the board (e.g., What will be different if the proposed amendment is adopted?).
- Thirty days notice of the proposed changes must be given to all members.
- A two-thirds vote of the members present at the meeting is required to change the bylaws.

### **What is a quorum and how do I know what your unit's quorum is?**

A quorum for your unit is set by your bylaws and is the minimum number of members who must be present to conduct business at a meeting. If a quorum is not met at a meeting, then a vote cannot be taken.

### **What is a Parliamentarian and what do they do?**

The Parliamentarian is an individual whose primary duty is to advise the presiding officer on question of parliamentary procedure. The president should appoint a parliamentarian. It is recommended that the president select someone knowledgeable about the association and rules of order. The parliamentarian should sit near the presiding officer for convenient consultation. The presiding officer may call on the parliamentarian at any time for advice. The parliamentarian does not speak unless given permission by the presiding officer.

### **When can a parliamentarian vote?**

The parliamentarian does not vote on any question except in the case of a ballot (written or paper) vote.

### **What is a procedure book?**

A procedure book is a set of materials reflecting the work of a particular office or committee. The book is compiled by each officer and committee chair for their own use during their terms and passed on to their successors. Procedure books contain records of events, programs, and projects, and include details of arrangements, evaluations of results, and lists of available resources. They are a good way for each officer and committee chair to build upon the success of his or her predecessor.

### **What is a plan of work?**

The plan of work lists the goals of your PTA and the expected means by which those goals will be reached. They include a calendar of activities, budget, and membership plan. The plan of work guides the unit's activities for any given fiscal year. Committee chairmen also prepare a plan of work for their committees, which must be approved by the Executive Committee.

### **How is a plan of work put together?**

- The plan of work should be based on the needs of the school and the community's children as identified by the members. Members should be surveyed as to their perceptions of the children's and school's most urgent needs, and how the PTA can help them best meet those needs.
- These needs, once identified, should be grouped and prioritized. The highest priorities should provide guidance for setting the PTA goals for the year.
- The goals you set will help you decide on your projects, programs, meetings, and other activities, which in turn determine your calendar of activities.
- To make your plans a reality, estimate how much money your PTA will need to reach its goals. Working with these plans of work, identify sources of funds and create a budget. Don't worry. There's more information on budgets in the Financial Management section of this guide.

### **How do we know what officers our unit should have? What are their responsibilities?**

Check your bylaws. Certain elected officers are essential: president, vice-president, secretary, and treasurer. Your bylaws specify what their responsibilities are. You can refer to the PTA President's Guide for more guidance on what each officer is expected to do.

### **What is the officers' term of office?**

Check your bylaws for the length of the term. It will be one or two years. Officers assume their office at the end of the school year. In other words, they begin their term at the end of the last day of school in the spring or July 1—whichever is stated in your bylaws.

### **None of my officers have contacted me yet. What do I do?**

Call them!! Welcome them to the team. Make sure they know what is expected of them. Tell them the time, place, and date for your first meeting. It also can be helpful to meet with each person individually as soon as possible.

### **What is the difference between the executive committee and executive board?**

- The **executive committee** is composed of the elected officers of the PTA; the principal, or another administrator identified to represent the principal, and a member appointed to serve as parliamentarian.
- The **executive board** is composed of the officers, principal, and chairmen of the unit's standing committees.

### **Who schedules meetings for my local PTA? For my executive committee? For my executive board?**

As president, you do! However, you should consult with your principal, officers and your board to identify mutually convenient dates and times for meetings.



**How often should we meet?**

The PTA's board or executive committee may meet as often as once a month. On the other hand, the entire PTA membership may only meet a few times a year, to elect officers or adopt the budget. Consult your bylaws to find out if there is a specified schedule. If not, determine what works best for your PTA. Meetings can be an efficient way to get the word out about what is going on in your unit and what issues you face. Meetings also provide opportunities for advocacy, training, parent education, and family fun.

**What is the difference between standing committees and special committees?**

Standing committees are permanent committees created to perform continuing functions. Special committees are appointed as the need arises to perform a specific task (i.e. nominating committee).

**What committees should our PTA have?**

Standing committee chairmen necessary to carry out the work of PTA include membership, parent involvement, publicity/communications, budget and finance, legislation, and Reflections/Arts in Education. Other committees are determined by the needs and plans of the local unit. The names of committees may vary slightly from unit to unit. Chairmen of these and other committees are appointed by the president or executive committee or elected as provided in your local bylaws. Check out the Local Unit Handbook for some ideas.

**How do I get ideas for programs and projects?**

One of the advantages of PTA is the many "idea" resources that are available to your unit. Check out the National PTA website. Read editions of National PTA's *Our Children* magazine. Call your council and network with PTA's in your area. Attend West Virginia PTA Convention and regional trainings. The great thing about PTA is you don't have to "reinvent the wheel".

**What are the keys to a successful membership campaign?**

An enthusiastic, organized membership committee with a comprehensive plan for an ongoing membership drive that clearly communicates the value of someone's investment in PTA membership is the critical factor. Membership is not about the "stuff". It is about making a difference in the lives of all children. Clearly, your membership committee chairman is one of the most important people on your board, and one of the first positions you should fill.

**Who can attend the West Virginia PTA Annual Convention in the spring of every year?**

Any member is welcome to register. Outgoing and incoming officers, as well as your principal, are encouraged to be part of this annual meeting by attending the general sessions, workshops, and celebratory events throughout the weekend. Registration forms are mailed to unit presidents in January or 60 days prior to the beginning of convention.

### **Is attending training and conventions a “legitimate” PTA expense?**

YES!! Attending training is an appropriate PTA budget expense. Verify that your budget allocates sufficient funds for training and attending important PTA events. (e.g. convention).

### **Fiscal Year. Budget Year. School Year. Calendar Year. What is the difference?**

It is easy to get confused with all of these different “year” ends.

- **Fiscal Year** is determined by your bylaws for IRS reporting purposes.
- **Budget Year** is determined by when the annual budget is approved, and is in force for twelve months from that date. Budgets should be approved at the first general meeting of the PTA when school begins in the fall.
- **School Year** runs from the first day of school in August through the last day of school in the spring. New officers officially begin their term according to the bylaws.
- **Calendar Year** is January through December, of course.

### **What is *Reflections*?**

It is an arts recognition program of the National PTA that begins at the local unit level and progresses through councils and state PTA then on to National PTA. *Reflections* provides children in preschool through grade 12 with an opportunity to express themselves in four areas: visual arts, musical composition, photography, and literature. The 2016-2017 theme, suggested by students in an annual theme search is “What is Your Story...”

## **FINANCIAL MANAGEMENT & FUNDRAISING**

### **Introduction**

PTA’s are private, not-for-profit organizations separate and apart from schools, school districts, or school systems. The PTA plays many roles in most communities. While the official mission of the PTA bears no mention of fundraising, increasingly PTA’s are engaged in fund raising. Understanding how these activities should be viewed in relation to PTA’s non profit (501c3) status with the IRS is critical.

### **Understanding the PTA Focus**

The trend in school funding causes a major challenge for PTA’s because schools find it necessary to be creative in order to fill budget gaps or in many cases cut programs. PTA’s have by default become fundraising agents for schools. While many PTA’s work hard every year developing activities and programs in classrooms and throughout their communities that help children and families, their role as fundraisers can threaten to overshadow all other good works. While appropriate fundraising is a legitimate activity for PTA’s it should never be a primary focus. The next century of PTA’s work will be as arduous and important as its first. PTA leaders will be called upon to assert their role as advocates to raise awareness that the education of children is a community’s number one priority. Parents are drawn to the PTA for its demonstrated leadership. A PTA could just as easily work on a project advocating for school funding as running a school fundraiser.

The challenge for PTA members is to work with fellow members, school administrators, and teachers to find ways to improve school funding. Those efforts will yield results far more profound and lasting than any piecemeal fundraising effort.

**The 3-to-1 Rule: (A rule that I've always found extremely helpful!)**

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

**Basic Principles of PTA Financial Management**

- Always operate under a budget approved by the general membership.
- Budget amendments are approved by the general membership.
- Never sign a blank check.
- Never sign a check payable to cash.
- All checks must have two (2) signatures.
- The books are audited annually or upon the change of treasurer.
- Use check request and money received (receipts) forms for every transaction.
- Submit the state and national portion of membership dues to West Virginia PTA on a monthly basis.
- Pay bills promptly upon submission of receipts.
- Never pay bills with cash.
- Deposit funds received immediately to the PTA's account, never into personal accounts or the school's account.
- Never leave money in the school, trunk of your car, or home overnight. You may want to use the bank's night depository—however, don't go to the bank at night alone.
- Two (2) people count money. The treasurer is the third (3d) counter.
- Reconcile the monthly bank statement upon receipt. The treasurer and president should review the bank statement together every month.
- File a 990 and Schedule A with the IRS if gross receipts exceed \$25,000 during the fiscal year.
- Purchase insurance (bonding, liability and officer's insurance).
- Make sure your PTA pays membership fees to the state PTA.

## **FREQUENTLY ASKED QUESTIONS ABOUT FINANCIAL MANAGEMENT**

### **Where do I find the budget and financial records?**

You and the incoming treasurer should obtain the budget and financial records from the outgoing treasurer. Review those records with your officers and make note of the things that must be done to start the coming school year.

### **What is a budget?**

The budget is an outline of estimated income and expenses for a twelve month period. It should be based upon the local PTA's plan of work for that twelve month period. The budget does not end at the end of the school year, nor upon the election of new officers.

### **Who prepares the budget?**

A budget committee is appointed and it prepares the budget. It is composed of the treasurer (who serves as chair), the president (past and present, if possible), committee chairmen responsible for sources of funds or revenue, and other interested board members (especially those with experience in financial matters).

### **How and when is the budget adopted?**

A new budget is adopted annually at the first general meeting of the school year. The treasurer, who serves as the budget committee chair, presents the budget to the board and executive committee for consideration. It must be presented to the PTA membership for approval at the first general meeting of the year. A majority vote of the members present is required for adoption.

### **How are changes made in the budget?**

- Since the budget is only an estimate of the planned expenditures for the year, it may be necessary to amend it during the year. Amendments require a vote of the members at any regular meeting or at a special meeting called for that purpose.
- To amend something previously adopted requires prior notice and a majority vote, or a two-thirds vote without prior notice.

### **What is a fiscal year?**

The fiscal year is the twelve month period used for reporting to the IRS. It determines when your Form 990 should be filed with the IRS if your PTA received gross receipts in excess of \$25,000 during the preceding fiscal year.

### **How much money do we need to run our PTA?**

It is the responsibility of your PTA to raise the amount of money needed to meet its proposed budget. The PTA is an educational organization, not a fundraising organization. Choose wisely the fundraising activities that best meet your PTA's needs. Start by identifying what programs and projects in your plan of work need to be funded. **Don't raise money first and then decide how to spend it.**

**Is it ever okay for PTA's to pay salaries of school personnel?**

ABSOLUTELY NOT!! This is a school system responsibility under all circumstances. Please refer to PTA Money Matters for more information.

**What is an audit, and how often does one have to be done?**

An audit is a financial review of the PTA's books. It must be conducted annually at the end of the officer's term of office and whenever the treasurer leaves office by an independent party—someone who was not a check signer, or related to a check signer on the account.

**Whose responsibility is it to see that an audit is conducted?**

The outgoing treasurer, as reminded if necessary by the outgoing president, should make arrangements for an audit to be done as soon as, and as expeditiously as, possible after they leave office. The incoming president should coordinate with the outgoing treasurer and president to insure this happens.

**Who can audit the books?**

Your unit does not have to hire a CPA to do the audit and generally speaking should not have to pay for an audit. It can be performed by an individual, or committee of no fewer than three people (see your bylaws for clarification). They can be PTA members from another school or someone in the community familiar with bookkeeping. The key is to have an independent review of the books conducted by someone who is familiar with proper PTA financial management. Under no circumstances can the auditor be one of the signers on the bank account, or related to one of the signers. You may contact your council, region or the state office for further guidance.

**What do we do with unspent funds when school ends? Do we have to turn them over to the principal?**

All funds can only be spent as approved in the budget. If they are not spent, then they should be carried over to the following year's budget. The officers cannot just decide how to spend or use up funds at the end of the school year. Also, you should never turn PTA funds over to the school.

**Is there a limit on the amount of funds that can be carried over from year to year?**

There is no limitation on amounts carried over from year to year; however, it is recommended that you limit fundraising to levels required for budgeted expenses to avoid substantial carry-over amounts.

**What does the PTA do for money during the summer?**

The budget that is in place for that time period will dictate what is approved and what can be paid. If expenses fall under an approved line item in the budget, they should be paid or reimbursed. If they are not covered by the budget, then they cannot be paid or reimbursed. If your bylaws state that the new officers' term of office began at the end of the school year, then the new officers' are responsible for making such decisions during the summer relative to the budget in place at that time.

**Can the outgoing officers commit how funds will be spent in the next budget year?**

No. A new budget is approved every twelve months based on the recommendations of the budget committee. Future boards are not obligated to use funds as designated by the previous administration.

**Can the principal tell the PTA how to spend the PTA's funds?**

No. Only the PTA decides how PTA funds will be raised and spent.

**With the reduction in the state's funding for education and local school system budget challenges, should not PTA's offer to fill the gaps by buying books, desks, equipment, and even paying salaries?**

Absolutely NOT!! More now than ever PTA's need to advocate securing adequate funding for education and for all children. PTA is not there to buy the basics, nor create inequities from one school to another.

**Does our PTA need insurance, and if so, what kind?**

YES! West Virginia PTA strongly encourages each PTA to have **fidelity bonding** insurance to cover all individuals handling funds and PTA assets. **General liability** coverage is also recommended to protect PTA members in case they are held legally liable for bodily injury or property damage resulting from a covered event. For example, if someone gets hurt at your fall festival and sues. Similarly, **directors and officers insurance** provides protection if an officer/director is sued for failure or alleged failure to live up to their responsibilities and duties assumed in their PTA position.

**AN OVERVIEW OF THE DUTIES OF THE PRESIDENT**

- One of the president's primary duties is to participate in leadership training programs offered by the state region and council PTAs.
- Next, the president prepares for the coming year by studying the PTA and how it operates. You will find a list of responsibilities for your officers in your local unit bylaws. You should review them right away.
- One of the most important aspects of being president is to help build an effective PTA team, one that can get things done. The president leads not by dictating, but by working together with members, officers, chairmen, the principal, staff and community leaders.

**To Be Successful, a President Should:**

- **Make** every effort to ensure that your board is representative of the whole community. Work to retain experienced board members and to include individuals who may not have served on the board previously.
- **Distribute** materials promptly to the board and principal. By channeling information received from the state and National PTA, the president ensures that the membership is well informed and clearly focused on the PTA mission.
- **Meet** early and regularly with the executive board to plan and set goals for the coming year. Choose goals that are within reach. Keep in mind that people are

- happier working toward goals they can identify, have planned themselves, and that are measurable.
- **Create** a climate of support and mutual respect where people feel they can contribute and grow. At meetings and in contact with volunteers, try to understand your fellow PTA members' opinions. Use their suggestions. Identify and make use of members' special interests and abilities. Find out who has expertise in programs, public relations, and other useful areas. Do they work for any other organizations? What special talent do they bring to the PTA?
  - **Delegate** responsibility by letting others shoulder responsibility and asking current officers and committee chairmen to train and encourage the leaders who will succeed them.
  - **Network** with other community leaders, groups, and agencies that share the goals of the PTA.

### **Reach Out.**

- The PTA team becomes stronger and is of greater service when it actively welcomes all groups in the community---young and old, single parents, dual-income families, families with diverse cultural and ethnic backgrounds, families with special needs children and area businesses.
- **Choose** the time and location of PTA meetings to suit the schedules of all families.
- **Invite** retired citizens and newlyweds to contribute their talents and skills to the PTA. There is no age limit on concern for children's well being. You don't have to be a parent of a K-12 student to become a PTA member.
- **Bridge** the language barrier. Find ways to reach out to people in their native language. One great place to start is the National PTA website where a wealth of materials have been translated for you
- **Communicate** with everyone regularly and often. And don't forget that communication is a two way street. Listen to what people are saying, both verbally and non verbally. Pay attention to their actions and inactions.
- **Delegate** to others. You should provide clear instructions and clarify your expectations. Ask yourself, "Has adequate training and support been given to insure success of the board member or volunteer?" It also is helpful to follow up on what has been delegated on a regular basis to avoid surprises and disappointments.

**PTA PRESIDENT CHECKLIST:** Here are some important items to have on your "to do" list.

- **March**
  - ✓ Make sure your unit is represented at West Virginia PTA Convention.
  - ✓ Attend all trainings and meetings hosted by your council or region.
  - ✓ Review bylaws and records of your PTA as well as resources of West Virginia and National PTAs.
  - ✓ Meet with your principal and officers.

- ✓ Appoint a parliamentarian and standing committee chairmen. Build a board that reflects your community.
  - ✓ Discuss goals and develop plans of work for your PTA and committees
  - ✓ Begin planning your membership campaign.
  - ✓ Make sure that arrangements are being made by the outgoing officers to have the books audited.
  - ✓ Find out when your fiscal year and budget year ends. They may not be the same.
  - ✓ Verify that a Local Unit Officers List is submitted to West Virginia PTA by July 1.
  - ✓ Consider attending National PTA convention.
  - ✓ Publicize the 2016-2017 National PTA *Reflections* theme, “What is Your Story” before school ends.
  - ✓ Express appreciation to the outgoing board for their efforts on behalf of children.
- **June**
    - ✓ Begin developing your calendar of PTA events and activities for the coming school year, including newsletter deadlines. Review last year’s calendar – analyzing what worked well and what you might want to change. Be aware of dates for feeder schools, council, region, and state PTA and school district/community events.
    - ✓ Instruct the budget committee to begin work on a budget for the coming year
    - ✓ Plan back to school activities and communications.
- **July**
    - ✓ Consider sending information home to families about back to school activities and joining PTA.
    - ✓ Review the completed audit and finalize your budget for presentation to the executive committee and board.
    - ✓ Continue planning with officers, committees and the principal.
    - ✓ Schedule and make plans for board meetings and general meetings.
    - ✓ Make ready to launch National PTA’s *Reflections* program in your unit when school begins.
    - ✓ Make arrangements for insurance and incorporation for your unit.
    - ✓ Review and revise your volunteer recruitment plans and forms.
    - ✓ Plan training and orientation for your board.
- **August/September**
    - ✓ Attend the West Virginia PTA Regional Training.
    - ✓ Conduct a friendly, highly visible membership drive, focusing on the value of PTA. Target parents, students, staff, neighbors, businesses and community organizations.
    - ✓ Prepare agendas for board and general meetings and articles for newsletters.
    - ✓ Conduct orientation and/or training for your board and volunteers



- ✓ Conduct the first general meeting of the year at which you approve the budget and auditor's report.
- ✓ Share important dates with your school community. Remind everyone regularly
- ✓ Promote *Reflections* participation. Communicate deadlines for entries.
- ✓ Publish a newsletter
- ✓ Remind the treasurer to remit the state and national portion of dues to the state office on a monthly basis.

## **LEADERSHIP AT MEETINGS**

PTA meetings are held to allow members to set goals, choose programs, and decide how to make their voice heard in the community. The president who learns how to manage meetings well will improve the PTAs ability to achieve its mission.

### **How to Conduct Meetings**

The President chairs all meetings of the executive committee, executive board and general membership. The key to conducting productive meetings is to be well prepared. Before the meeting, the president should set the stage by writing the agenda, contacting everyone who has a report to give such as committee chairs, officers, student members, or school staff and making sure that materials and arrangements are complete for each item on the agenda.

Chairing a meeting requires skill in relating to people with various backgrounds and different points of view. Here are some suggestions for working effectively with others.

- Encourage all members to enter into the discussion. Listen respectfully and ask clarifying questions.
- Point out areas of agreement between speakers. Help the group to see issues in terms of what is best for children and will help accomplish the goals of PTA.
- Encourage positive action. Urge members to learn the facts and decide what can be done.
- Recognize that no one can please everyone all of the time. Keep a sense of humor and friendly attitude.

### **The Agenda**

Just as no two PTA meetings are alike, no two agendas are alike. The president tailors the agenda to achieve the goals of each meeting. Once the agenda is set and the meeting has begun, the chair can help the meeting run smoothly by remembering to follow the agenda and make sure a motion is on the floor before discussion begins. Finish one item of business before moving on to the next. **WATCH THE CLOCK!** Always start and end on time.

### **Parliamentary Procedure**

PTA meetings are conducted according to parliamentary procedure. Though it can seem "fancy" or cumbersome at first, parliamentary procedure is simply a set of rules for conducting organized meetings. Following parliamentary procedures lets the PTA

accomplish its goals fairly while protecting all members' rights. This is democracy in action.

The basic principles of parliamentary procedure are:

- Consider one thing at a time
- Follow the rule of the majority.
- Ensure justice and courtesy for all and partiality for none.
- Preserve the right of the minority to be heard.

The parliamentary authority for PTA is Robert's Rules of Order Newly Revised. Have a current edition. The president should keep a copy of the current edition handy at all meetings. Asking for help is not only allowed, but it is expected and encouraged. No one is perfect the first time or the second either. The president who asks for help when necessary sets a congenial tone that helps everyone adapt more easily to parliamentary procedure. With practice, parliamentary procedure helps PTA members make tough decisions together and remain friends in the process.

**Eight Steps to a Motion** – Only members are legally qualified to make motions, discuss, and vote.

1. **Obtain the floor.** Member rises and addresses the chair, "Madam/Mister President".
2. **Assign the floor.** The chair recognizes the member by nodding or stating their name.
3. **Make the motion.** "I move that..."
4. **The motion is seconded** "I second the motion." **If there is no second after the chair asks for one, the chair says, "Motion fails for lack of a second."**
5. **Chair states the motion.** "It has been moved and seconded that..."
6. **Debate or discussion.** "Is there any discussion?"
7. **Vote.** "All in favor say 'aye'". "All those opposed say 'nay'."
8. **Chair announces result.** "The 'ayes' have it and the motion is carried, and we will..." or "The 'nays' have it and the motion is lost."

**Sample Agenda** – Prior to each meeting, prepare an agenda and **FOLLOW IT**. You can use this guide to help you.

1. **Call to Order** – 7:00 p.m. The president stands, raps the gavel once, and calls the meeting to order. "*The meeting will please come to order.*"
2. **Opening Ceremonies** (optional) – The Pledge of Allegiance, flag ceremony, poem, song, or inspirational message may be included.
3. **Reading and Approval of Minutes** – The secretary stands, addresses the president, and reads the minutes, unless they have been posted, distributed, or audited by an appointed committee. "*The secretary will read the minutes of the previous meeting.*" "*Are there any corrections?*" "*The minutes stand approved*", or "*The minutes stand approved as corrected.*"
4. **Report of the Treasurer** – No motion is needed for adoption unless it is the report of the completed audit. "*We will have the treasurer's report.*" "*Are there any questions?*" "*The report will be filed for audit.*"

5. **Letters or Communications** – Communications are read by the secretary and are acted on as they are read if action is required. *“Are there any communications?”*
6. **Report of Executive Board** – A summary report, (NOT THE MINUTES), is read for the information of the members. Recommendations should be voted upon one at a time with the secretary moving the adoption of each one. *“We will hear the report of the executive board by the secretary.” “You have heard the recommendation. Is there discussion?”* Follow the steps of a motion.
7. **Reports of Standing Committees** – Before the meeting, the president consults with chairs and officers to find out which committees have reports to give. At the meeting, the president calls for the committee’s report (NOT CHAIRMAN’S REPORT). If the committee has made a recommendation, the person making the report moves its adoption. No second is required since the motion is made on behalf of the committee. The chair calls for discussion and/or follows steps of a motion. *We will hear the report of the \_\_\_\_\_ committee given by \_\_\_\_\_ chair (or other title).” “Are there any questions regarding the report? If not, the report will be filed.”*
8. **Reports of Special Committees** – These can be a progress or final reports. Upon completion of its specified duties, the committee ceases to exist. Reports are handled in the same manner as those of standing committees.
9. **Additional Reports** – These can be reports from staff, students, principal, senior citizen, or another volunteer.
10. **Unfinished Business** – Minutes of the previous meeting will indicate any unfinished business. Note that unfinished business is not called “old” business.
11. **New Business** – The chair or members may bring new business before the association. A motion is necessary before discussion and vote.
12. **Program (a program is NOT required at every meeting)** – The president introduces the program chair who presents the program. The meeting is not “turned over” to the program chair nor does the program chair “turn the meeting back” to the president. *The program will be presented by \_\_\_\_\_, program chair.” “Mister/Madam President, this concludes the program,”*
13. **Announcements** – The date of the next meeting and important activities should be announced. If there is a social time following the meeting, this should be announced. *“Are there any announcements?”*
14. **Adjournment** – 8:30 p.m. No motion is necessary to adjourn. Rap the gavel once. *“Is there any further business to come before the meeting?” “The meeting is adjourned”.*

