

Help! I'm a New Unit President

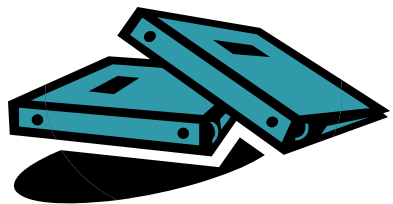
Workshop 403/503

2009 California State PTA Convention

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.





Creating and Keeping a Procedure Book



One of the most helpful tools for a PTA volunteer is the *Procedure Book*. Maintaining a procedure book will provide helpful and useful information for each officer and/or chairperson. This information can then be passed from volunteer to volunteer each year and provide an invaluable resource. If you are a new volunteer and there is not a procedure book for your position, now is the time to create one. The procedure book, which can be a three ring binder, should contain a record of work done and other helpful material that has been collected. Include the following:









- A copy of the local, state, and national bylaws and the National PTA handbook.
- Standing rules.
- The annual budget.
- Programs for the year.
- Materials from workshops and convention.
- Job descriptions that are updated regularly for easy reference.
- Agendas, minutes, financial reports, and all other reports.
- A list of the officers and chairpersons addresses, telephone numbers, and e-mail addresses.
- A list of resource people and organizations. Include addresses, phone numbers, and email addresses.
- Special information relating to officers or chairs including current work plans (including all flyers sent out for events).
- Back program correspondence and files for at least two years so that each administration can look back on their predecessors work as needed. (*Check legal requirements for some files which must be kept for seven years. Minutes must be kept forever.*)

Procedure books are created to help a PTA run smoothly and provide each chairman or officer with a record of what has been done in the past. Remember the procedure book, as with all PTA materials, belong to the organization. Once a chairperson or officer has moved out of a position, the procedure book should then be passed on to the next person filling the position.



SAMPLE

Camp California Elementary PTA 2009-2010 Calendar of Events and Deadlines

<p style="text-align: center;">June</p> <p>___ President-elect with Principal *Summer plans for PTA *Continue to build good relationship</p>  <p><i>Over summer.....</i></p> <p>*Attend all leadership training *Have casual committee meetings to get organized and plan early *Write your newsletter articles *Organize your file and papers</p> 	<p style="text-align: center;">July</p>  <p>1 Take office 1 Prepare audit - <i>outgoing auditor</i> 1 Change signature cards at bank ___ Executive board meeting- ___am/pm *Decide on goals & review draft calendar *Present budget to board for review *Copies of bylaws to board</p>	<p style="text-align: center;">September</p>  <p>___ First Day of School *Membership Kick-off ___ Executive board meeting-___am/pm *Appoint bylaws/standing rules review committee ___ Association Meeting *Adopt audit *Approve proposed programs/projects *Approve updated budget *Approve fundraisers *Submit membership dues weekly</p>
<p style="text-align: center;">October</p> <p>___ Deadline-1st remittance member dues *Minimum of 15 members- Early Bird ___ Kick-off Reflections ___ Executive board meeting - ___ am/pm</p>  <p>20-25 Red Ribbon Week </p> <p><i>Membership dues to council *Send weekly</i></p>	<p style="text-align: center;">November</p> <p>___ Deadline - 1st <i>required</i> remittance *50+ members- Chairman's Club ___ Executive board meeting - ___am/pm 15 Tax return deadline *Forward 2 copies ___ <u>Scholarship Deadline</u> *Teacher/Counselors, Nurses, PTA Volunteers ___ Association Meeting Reflection entries to council</p> 	<p style="text-align: center;">December</p> <p>___ Insurance due to council/district ___ Workers comp form due ___ Executive board meeting-___am/pm</p>  <p>Send membership dues monthly Prepare books for auditor <i>updated: 3/29/09</i></p>

Executive board meetings are held on: _____ [week and day in the month] (quorum= ___)

General (the "association") meetings on: _____ [week and day in the month] (quorum= ___) *Months listed in your bylaw:

2 Copies of all reports due annually (1-President & 1-Procedure Book)

Add council and district association meetings to calendar

Camp California Elementary PTA

2009-1010 Calendar of Events and Deadlines



January

- Executive board meeting-__am/pm
- Association Meeting
- *Elect nominating committee (__+_ alternates)
- *Read prior committee - not eligible
- *Elect convention delegates
- *Adopt bylaws (returned signed by State)
- Scholarships/Apps to State (Due 2/1)
- Graduating Senior Scholarships
- My PTA/PTSA Award Application
- To National: Phoebe Apperson Hearst
- Excellence in Education Partnership
- Complete mid-year audit

February

- Register for Convention
- Executive B\board meeting - __am/pm
- *Present audit to board
- *Review mid-year budget
- *Review goals
- *Procedure books-up to date?
- 17** Founder's Day
- Mid-year membership drive
- Notify members of slate of officers
- *30 day deadline before election
- Forward Founder's Day Freewill Offering



March

- Executive board meeting - __am/pm
- Final membership dues to council
- Association Meeting
- *Adopt audit- 2 copies to council
- *Elections for 08-09 school year
- *Bring membership list & ballots
- Honorary Service Awards



April

- Executive board meeting - __am/pm
- President-elect Meeting
- with officers-elect and principal
- *Ratify parliamentarian & committee chairmen
- *Discuss future goals, plans, school calendar
- *Copies of bylaws for board-elect
- *School yr theme? Core subject focus-programs?
- Budget meeting -
- *Chairman - incoming treasurer
- *Committee - listed in Standing Rules



May

- List of officers & required chairmen
- *List due to council/district
- Executive board meeting - 7pm
- Annual Report due to council
- Association Meeting
- *Membership to approve proposed budget
- *Approve all routine summer expenditures in budget



June

- Executive board meeting - __am/pm
- *Incoming/Outgoing boards invited
- *Bring procedure books to pass on
- *Copies of bylaws for incoming chairmen
- 15** Free Will Offering
- *Final remittance date to council



**Loop back to June.....*

30 111th State Convention - Sacramento (4/29-5/2)

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.

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.

Executive Board:

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

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.

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.

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. Have a membership drive. Increasing parent participation is one of the primary goals of PTA. Keep an up-to-date membership list.
2. Submit dues, insurance payment, workers' comp form, financial reports, and annual report of volunteer hours to council PTA by the due dates.
3. Have at least 3 officers – president, treasurer and secretary.
4. Have at least 3 general meetings per year: September – approve the budget; January – elect nominating committee; March – elect officers.
5. Have a budget approved by the membership at the first meeting. Only spend money (any and all money) as approved by the membership at a general meeting and properly recorded in minutes of the PTA.
6. Have two valid signatures on all checks and have receipts for EVERY payment of any kind.
7. Only undertake activities as approved by the membership at a general meeting and properly recorded in minutes of the PTA.
8. Follow PTA insurance guidelines for appropriate PTA activities (summarized in the red/yellow/green light section of the Insurance Loss and Prevention Guide).
9. Review the bylaws at least once per year.
10. Do audits twice a year, January and July, or according to the bylaws.
11. Attend council PTA meetings – the council is there to assist you.
12. Work together - parents, principals, teachers, and staff are all one team!

Annual Checklist

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
- Check with council/district for meeting schedules and training opportunities

September/October

- Prepare for the Back to School 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

November/December

- Forward proposed resolutions in time for action by council/district
- Remind treasurer to remit per capita, insurance and Workers Comp forms
- 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

March/April

- Conduct the election of officers at the annual meeting
- Work with the historian on the Annual Report
- Begin transition with president-elect
- COMPLETE THE JOB

May/June

- Prepare for the final association meeting
 - Motions for executive board to pay summer bills and 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**