

# The PTA President's Survival Manual





## OH NO! WHAT HAVE I DONE??

As a PTA president you are a member of:

- National PTA
- New York State PTA
- Region PTA
- Your Local Council of PTAs
- All of your PTA Board committees (*except Audit and Nominating*)

You will also attend (or send a representative to) other meetings:

- PTA Council Meetings
- School Board Meetings
- New York State PTA Convention (once a year, in November)
- Region PTA Conferences and Leadership Workshops:
  - Officers' Training
  - Membership/Reflections/Treasury Workshop
  - Resolutions Workshop
  - Fall Conference
  - Presidents' Principals' Event
  - Legislation Forums
  - Reflections Reception
  - Region Spring Conference
- New York State PTA Legislation Summit
- New York State PTA Summer Experience

You will also meet regularly with:

- Your school principal
- Your PTA unit Executive Committee (Officers) (monthly)
- Your PTA executive Board (Officers and Committee Chairman) – as called for in your bylaws
- Your PTA general membership – as called for in your bylaws

As a PTA President, you have the responsibility to lead your school as well as to understand the entire district.

A PTA Council is responsible for a GLOBAL view of your school district. Each school is but a piece of the whole.

## HOW DO I FULFILL THIS?

**By staying informed, reading your mail, and attending leadership workshops!**

**Question: *Why did I say Yes?***

You said **yes** because you were nominated by a committee of your peers who expressed faith in your ability to lead the parents and teachers in your community. Of the hundreds of possible candidates for this position (and we know there were hundreds), they chose you.

You said **yes** because you are an active and involved citizen of your community who enjoys a challenge and because you are open-minded and ready to lead.

**Question: *What IS a PTA President?***

You are the Chief Executive Officer of a large organization with a small (?) budget whose product can make living in the community wonderful.

You are a cheerleader, a facilitator, a calming influence, an agent for communication and someone who promoted understanding: a LEADER.

You are a curious person who is genuinely interested in your school community, and you can see the “big picture”.

**Question: *Where do I go from here?***

Take a deep breath first. Exhale slowly. Meet with your predecessor. Begin to attend meetings. Check out old files. Read the manuals. Find the bylaws and read them. Plan a meeting with the new Executive Committee. Meet with your principal. Decide on your beginning goals for the coming year. Then, in collaboration with your team and you school principal, plan the PTA calendar for the next year.

**Read:** Your bylaws,  
PTA handbooks  
Your mail  
Old newsletters and reports

**Meet with:** Your predecessor  
Present committee chairs  
The school principal  
The school superintendent

**Plan:** Your goals as a PTA  
The calendar for the coming year  
Your budget  
Your meetings

## **PRESIDENTS SUCCEED BECAUSE THEY:**

- ✓ Make each member feel welcome
- ✓ Help each member understand the organization and its purpose
- ✓ Take the time to read all information received
- ✓ Take time for adequate preparation
- ✓ Arrange activities in which all members can participate
- ✓ Delegate the work
- ✓ Distribute materials to appropriate officers or chair people
- ✓ Always refer to the organization as “your PTA”
- ✓ Remember they are only the CHAIR, never the BOSS
- ✓ Never forget to praise
- ✓ Always remember to say, “Thank you, you did a great job!”

## **HOW TO FIND INFORMATION:**

**Ask Your Local Council President**

**Ask Region PTA Board Members**

**National PTA Annual Resources - (Go online to register for resources)**

**New York State PTA Resource Guide - (Available at [www.nyspta.org](http://www.nyspta.org))**

**NYS PTA Member Emails - (Sent regularly)**

**Region PTA workshops (which may include)** - Officers’ Training, Membership/Reflections/Treasury Workshops Resolutions Workshops, Fall Conference, Nominations & Elections Workshops, Legislation Forums, Arts-In-Ed Showcase, Reflections Receptions, and Spring Conferences

**National PTA Website - [www.pta.org](http://www.pta.org)**

**New York State PTA Website – [www.nyspta.org](http://www.nyspta.org)**

**Region PTA Website – (look for the link to your region PTA website through [www.nyspta.org](http://www.nyspta.org))**

# REMINDERS

Complete your unit's electronic "Annual Officers' Contact Information (Form A)" on the NYS PTA website. If the name of the president is not given each year, the unit will not receive information. Your name is NOT shared with any other organization.

## MEMBERSHIP:

1. Utilize the online membership system and your own unit's portal which is made available to you from New York State PTA.
2. Make sure the first membership payment is sent by the October 31 deadline to:  
New York State PTA  
One Wembley Court, Albany, NY 12205-3830
3. Make sure that payments are sent periodically for memberships taken in person (perhaps monthly or bimonthly).
4. The combined membership dues for National PTA and New York State PTA are \$4.00 per member for 2017-2018, which are sent to New York State PTA. (This is the portion of the dues that your unit membership dues which is retained by or sent to the State PTA.) The State office then sends the appropriate amount forward to National PTA.
5. The final membership payment is due by May 31 to New York State PTA.
6. You will be billed for all unpaid online memberships.

*According to State bylaws, only members can vote at PTA meetings!!*

*Members who wish to attend Convention MUST show a membership card to register and vote.*

## BYLAWS:

1. Find the copy of the unit bylaws and read it.
2. A copy is also located on your unit's portal site.
3. Make sure your bylaws are up-to-date. Bylaws must be revised every three (3) years.
4. Give a copy to each member of the Executive Committee. Make sure that the secretary brings her copy to every meeting.
5. Be familiar with the bylaws. In particular, look for:
  - a. The Purposes of PTA
  - b. How often you hold elections and in what month
  - c. The composition of your Executive Committee and executive Board
  - d. The composition of your nominating committee
  - e. When general membership (association) meetings should be held.
  - f. What comprises the Association
  - g. How much you should charge for dues. This is written in the bylaws and cannot be changed without a membership vote and bylaws amendment.
  - h. When your audit should be done, and by whom.
  - i. What your fiscal year is.

*Your bylaws are your structure as it is governed by the section of the Internal Revenue Code under which non-profits fall – 501-c-(3), as well as by what National and New York State PTAs have found to be good, solid safe practices for PTAs. Following them protects you and your members and will keep your organization running smoothly.*

## PROCEDURES:

Procedures are a compilation of methods of operation. Not all units have Procedures, but if you do have them, they can be very helpful because they will cite successful ways to run unit events and committees. If you wish to write Procedures, guidelines are available in the Resource Guide of the New York State PTA. Procedures should contain job descriptions – very helpful to ensure that volunteers understand their roles and responsibilities.

## INSURANCE:

Units	2017-18 Rate	2018-19 Rate	Late Fee
SEPTAs	\$100	\$100	\$20
1 Building	\$290	\$300	\$20
2 Buildings	\$490	\$500	\$40
3 Buildings	\$690	\$700	\$60
4 Buildings	\$890	\$900	\$80
5 Buildings	\$1,090	\$1,100	\$100

1. Insurance is as per the schedule above and is due before June 1 of each year. Your officers, chairman, and members are covered, and excellent liability coverage is provided. It is intended to protect you.
2. Read the “Stop, Pause, Continue” insurance information carefully. Share its contents with your Executive Committee, Committee chairs, and Principal.
3. Your Insurance certificate is sent after payment has been received. If you have questions about insurance, contact:

**AIM Insurance Company**  
**Ph: 800-876-4044 or 214-360-0801**  
**Fax: 214-360-0802**  
**Email: [aim@aim-companies.com](mailto:aim@aim-companies.com)**

4. Plan wisely, so that the health and welfare of your membership and children are your first concern! “STOP” activities are listed because other PTAs have had serious problems as a result of that activity.

## THE FIDELITY BOND:

Part of the coverage you pay for in your insurance payment is the FIDELITY BOND. Read the insurance packet! In order to be covered, you must:

- ✓ Have two signatures on all checks.
- ✓ Never pre-sign checks
- ✓ Doing a monthly reconciliation of the bank account by an unrelated officer with no check signing privileges is highly recommended.

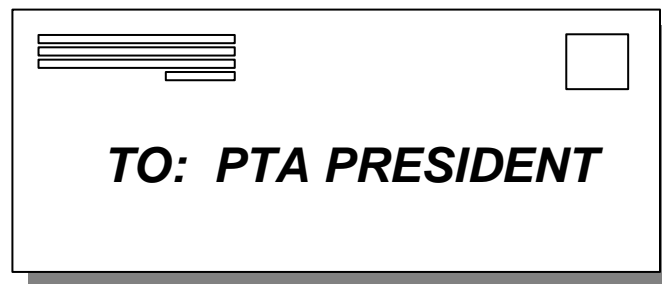
Directors and Officers insurance coverage extends to committee chairs as well as elected officers.

## BEING A UNIT IN GOOD STANDING:

A unit in good standing is one that:

1. Has made a membership payment before October 31.
2. Has paid the insurance premium
3. Has 25 members or more
4. Has bylaws that are up-to-date

If your unit is NOT in good standing, it cannot participate in awards or vote at events of National, New York State PTA, Region PTA or Council PTA. PTA units are self-governing and their tax exempt status is protected under IRS Section 501(c) (3) if they are in GOOD STANDING. The unit may face disaffiliation from PTA if the outstanding items are not resolved. Following the four simple steps listed above protects your “good standing” and allows you to operate as a PTA.



**Question:** How is the mailing list for National PTA, NYS PTA, and your Region PTA compiled?

**Answer:** By completing the Annual Officers' Contact Information (Form A) on the NYS PTA website your information will be secured.

### TIPS:

- **Open mail immediately. Read it at least once a week – (maybe while the kids are doing their homework!)**
- **Have your file system at the ready, including a three hole punch. A carry-all file box containing file folders for each officer and committee chairman makes the perfect, portable file cabinet for current information. Bring it to meetings so you can take it home empty!!**
- **READ, DISTRIBUTE, FILE - - Enjoy the extra counter space!**
- **Most mail is for committee chairmen – DISTRIBUTE IT! Membership and bylaws guides are available in the NYS PTA Resource Guide – direct your board members to the Resource Guide for valuable information. All mail is sent to you because as President you need to receive the information. But if you don't pass it on, the chairman who needs it may never see that same information.**
- **Remember, all PTA literature can be reproduced for your members.**



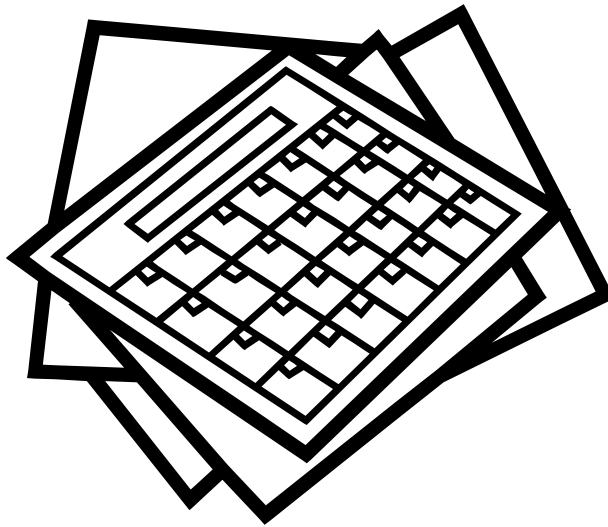


## THE TELEPHONE

### IT LOOMS LARGE, BUT DO NOT FEAR!!

#### YOU HAVE OPTIONS:

- You don't have to answer it right now – let the answering machine get it.
- Answer it, but if the caller has a difficult question or it's a bad time, you can say "Let me find out and I'll call you back". If you use this option – CALL BACK!
- Answer it and be a good listener. You don't have to have all the answers. If the person is angry most likely they only need to 'vent'. Let them know you hear their concerns.
- PUT YOUR FAMILY BEFORE THE PTA. Dinnertime should be **protected time**. Use the answering machine. Set a time for the first call in the morning and the last call at night and stick to it. USE THE ANSWERING MACHINE!
- Don't go into panic mode if what you hear is alarming. Remain calm and listen. As questions such as: how many people did you speak with, details about the problem, etc. Don't commit yourself until you have had time to think and make a few strategic calls yourself to follow up on the information. Listen and GET BACK to the caller.
- Return all phone calls within a reasonable period of time.
- Keep a log of all calls. A notebook by the phone, labeled "PTA", can serve nicely.



## **YOUR CALENDAR IS YOUR LIFELINE!**

If you have not yet learned to live by your calendar, **now** is the time! If you prefer to use a hard copy calendar rather than that on your phone, here are some ideas:

It is suggested that you have **two calendars – one which you carry with you AT ALL TIMES and one LARGE calendar for your kitchen.**

**ALL TIMES** means: to work, to the hairdresser, the doctor, the orthodontist and dentist, to all meeting, to school board meetings, at the telephone and to school.

**A LARGE KITCHEN CALENDAR** is handy so you can plan your entire month AND so that everyone in the family knows where you are at any given time. It's handy for the family to use as well for their dates (which you will then transfer to your ALL TIMES calendar).

Put ALL dates on both calendars. That way you won't schedule a doctor's appointment when you have a meeting or a conference when you have an important soccer game to attend.

Also, schedule in TIME FOR YOURSELF! A trip to the mall, a manicure, some time to sit down and read a book or take a long walk. **STICK TO IT!** The dates should be no more flexible than meetings. You need time for yourself and your family. If you don't take the time you will resent the job.

If you follow this advice, you will have time for everything:

- Making dinner
- Spending time with your kids and husband
- Calling your best friend
- Going to meetings

You will be rewarded with an organized life and maybe even the kids will catch on that planning ahead actually works.

# How to Lead the Perfect PTA Meeting!!

Good meetings don't just happen. They are the result of carefully:

- Planning ahead by
  - Rereading the minutes of the last meeting. What was decided? Is there unfinished business?
  - Reviewing the calendar to remind yourself of past and upcoming events. Do the chairmen have reports? ASK them before you schedule them to report.
  - If committees have reports, finding out how much time they need.
  - Making sure that the facility is secured, any props (podium, microphone, tables, chairs, hospitality, etc) are reserved. This could (and probably should) be done by a vice president, secretary or even the hospitality chair.
  
- Writing an agenda
  - List the quorum needed (found in your bylaws) if anything will be voted on.
  - Craft a simple agenda, easy to read, follow and make notes on. This will help both you and your members.
  - List committees, chairs or others with specific reports. If a chair does not have a report, the do not need to be listed on the agenda.
  - Make sure that the recording secretary has a copy of the agenda before the meeting opens.
  - Make sure that you have an adequate number of copies of the agenda for your members.
  
- Start the meeting ON TIME!
- Have a copy of Robert's Rules of Order, Newly Revised, at hand. Using parliamentary procedure, however simplified you make it; will ensure that the rights of the members are protected.
- Stand when presiding, except during the reports of others.
- Make sure that the recording secretary has a copy of the bylaws in her book of minutes.
- Have a gavel or something you can use to bring attention back to you.
- As chair, you are the leader, the facilitator of the meeting. The chair does not express a personal opinion during debate. The chair does not vote except in the event of a tie, and then voting should be done by ballot to preserve impartiality.
- Make sure that all members have an opportunity to express opinion, but ensure that no one monopolizes the discussion. Set a time limit. Use the gavel to call for order (rap it once, loudly).
- If an issue cannot be easily decided in a simple discussion, establish a committee to study it at length and specify the date at which this committee should report back to the membership.

*Remember – Only PTA members may vote!!!*

# A SAMPLE AGENDA

**Call to Order** – opening ceremony, inspiration (optional)

Establish a quorum (in the bylaws). Begin the meeting if a quorum is not present; people may arrive late. You can conduct a meeting without a quorum but cannot take a vote until a quorum is established. *However*, in the event of an important issue, a vote may be taken that then must be ratified at the next meeting where a quorum is present.

**Approval of the Minutes.** Don't read minutes out loud. Copy and distribute minutes prior to the meeting or as people arrive. Ask for any corrections, etc. Minutes stand as read or corrected.

**Treasurer's Report** This report is filed for audit. A monthly reconciliation must be performed by a non-check signing board member. Results of reconciliation should be announced – i.e. "the statement is in good order".

**Correspondence/Announcements**

**Executive Report**

**Principals Report** (Where you place the principal's report on your agenda is your choice.)

**Committee Reports**

**Unfinished Business** (not "old business" anymore)

**New Business**

**Announcement of Date of Next Meeting and Adjournment**

## PROGRAM

***A few reminders.....***

- ✓ Respect the work of your committees. Do not allow their work to be debated on the floor of the meeting. If the committee is making a recommendation, it should be voted on. A committee report does not require a "second". If the work is incomplete, it continues to be handled *in the committee*.
- ✓ Don't be afraid to lead at the meeting. Call for order and/or adjourn if the meeting is out of control.

PTA is non-partisan, non-commercial and non-sectarian and is about issues, not fundraising.

## AT MEETINGS.....

The organization is the most important. All members are equal.

Sometime, in the discussion about issues, people will have differing opinions.

Respect everyone and demand respect as chair.

Use of Parliamentary Procedure will ensure protection of the rights of everyone. Use motions and votes to decide issues, or refer to committee.

Parliamentary law ensures

Courtesy to all

That one item is discussed at a time

Majority rule

Respect for the rights of the minority

Partiality for none.

A motion has basic steps:

The speaker is recognized by the chair.

The motion is stated. "I move that....."

It is seconded. If there is no second, the motion is defeated.

The chair restates the motion, so that everyone in the room has heard it.

Chair calls for discussion or debate. Time can be limited.

Put the question – the chair takes a vote.

The chair announces the results of the vote. Most items win by majority.

Anything that affects the rights of members (such as bylaws) require a 2/3 vote of the members present (understanding that a quorum is present).

### Responding to Opposition at Meetings

It is the responsibility of everyone present to ensure that the meeting is a good one. As chair, you should:

Remain impartial and stay calm.

Address the question, not the questioner.

Treat the speaker with respect. It diffuses most anger.

Ask for clarity if the speaker is rambling – "Mr. Smith, what is your exact question?" Then try to answer the question or ask for help from your officers, chairs, etc.

Use humor respectfully.

Avoid being forced into a trapped choice. Refer to committee to study a complex issue, for example.

Or you can rule the topic out of order if it is not on the agenda, is not an appropriate PTA issue, or is of a personal nature not suited for a public meeting. When all else fails – adjourn!

# GUIDELINES FOR REACHING OUT

## Ideas To Help PTAs Involve All Parents

### OUTREACH

Establish an outreach committee of interested and dedicated PTA members, including teachers and administrators, to become knowledgeable about cultural diversity within the community.

Translate notices, newsletters, etc., to communicate with parents in their language.

Provide translation at all meetings and advise parents in advance that this service will be available.

Contact leaders of specific cultural groups and ask their assistance in inviting the parents to PTA meetings. Invite the leaders to attend at least one meeting with the parents.



Hold meetings in community centers, if necessary, to overcome reticence to attend meetings at school.

Include the entire family in the invitation, particularly the father, and provide babysitting and child care if necessary.

### PROGRAM

Conduct a face-to-face survey, telephone survey, or send printed questionnaires asking parents what they want or need to know about the school and their children's education. **Plan meetings to address those concerns.**

Use resources provided by your school, school district, county schools, local colleges and universities, and any/all local ethnic/cultural groups to help plan your activities and programs.

Work with the school district (or other appropriate resource) to plan classes for non-English speaking parents desiring to learn to communicate in English (ESL classes). English-speaking parents may want to learn a foreign language. Ask them.





## The Budget, etc.

*All members of the Executive Board – officers, chairs and others listed in the bylaws – bear fiduciary responsibility to the membership. This means that each assumes the responsibility to act in a prudent manner and to exercise reasonable care and diligence to assure that the best interests of the PTA and its members are protected and preserved.* NYSPTA Resource Guide

As president, your job includes demonstrating leadership about the fiscal affairs of your PTA. This means you should:

- 👉 Review the budget with your predecessor.
- 👉 Speak to outgoing chairs about their budget line.
- 👉 Meet with the outgoing and incoming treasurer before school closes.
- 👉 Hold an annual audit, and audit the books at any time that the treasurer changes.
- 👉 Plan a proposed budget for the coming year with the Executive Committee and others as appropriate by perhaps creating a budget committee.
- 👉 Present the budget at the (first) general meeting for approval (vote).
- 👉 Be sure that everyone understands that budget and those committees understand their budget lines.
- 👉 Adapt the budget to reality. Budgets can be amended (by vote).
- 👉 Establish a voucher system for reimbursements to members, including presentation of receipts or other verifying information.
- 👉 Establish procedures for the handling of receipts at fundraisers.
  - Ensure that money is counted by two or more people at all times
  - Ensure that deposit slips are written out at the time of the count and co-signed
  - If checks are deposited, keep a record of the deposits
  - Use a cash box that can be kept in a safe location
  - Ask committees to report on the success of the event, including report on the finance of the event, at the next PTA meeting.
- 👉 Make sure that all PTA checks have two signatures.
- 👉 Pay all bills by check.
- 👉 Never deposit PTA monies into a personal account.
- 👉 Appropriate PTA expenses include sending members to leadership training workshops, to attend Region PTA events, to attend NYSPTA events, and National PTA events. Investing in the on-going training of your current and future leaders is the BEST way to ensure the on-going success of your PTA.

# TREASURER'S and PRESIDENT'S CALENDAR

*Following are important dates for Treasurers and Presidents. Check the Bylaws and your unit calendar for other dates concerning your unit or council.*

## **AUGUST**

- Attend Region Membership, Reflections, and Treasury workshops

## **SEPTEMBER**

- Start your membership campaign.
- Register for Fall Leadership Workshops
- Submit budget to membership for approval

## **OCTOBER**

- Attend Region Fall Conference
- Register for PTA Convention
- October 31: First membership payment due (followed by continuous payments throughout year)

## **NOVEMBER**

- Form 990 due to IRS by 11/15 (4 months & 15 days from end of fiscal year)
- November, 3-5, 2017 - NYS PTA Convention – Niagara Falls, NY

## **JANUARY**

- Register for Legislation Summit
- Register for Region Nominations & Elections Workshops

## **FEBRUARY**

- Attend Legislation Forums

## **MARCH**

- Participate in Lobby Day

## **APRIL/MAY**

- Register for Region Spring Conference, National PTA Convention and Summer Leadership Conference
- Attend Spring Conference
- Final membership dues payment due to NYS PTA by May 31

## **JUNE**

- June 1: PTA insurance payment due to insurance company
- Attend Officers Training
- Arrange for Audit of PTA books
- End of your financial reports due
- Carryover of reserves OK up to half of annual expenditures.



**ALWAYS REMEMBER THE 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, that parents and teachers may cooperate intelligently in the education of children and youth.
- 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.



**Most of all, remember to.....**

Work for kids

Accept advice from your predecessor

Look for your successor

Be proud of your accomplishments

Be sure each person understands their job and has the proper materials

Utilize the Region board if you need help

Have FUN, and help your coworkers have FUN too!!

*“Some people give time, some money, some their skills and connections; some literally give their blood...but everyone has something to give.”* Barbara Bush

