

## **Key Role – President**

- Oversees and coordinates the work of an executive board to run a PTA effectively
- Presides at PTA board and association meetings
- Serves as the official contact, communicator and representative of a PTA
- Designated as an authorized signer for PTA checks, contracts and authorizations for payment
- Serves as ex-officio member of all committees except the nominating committee
- Works with other PTA leaders to connect families, school and community to support student success

## **Getting Started**

**Preparation** – Review the unit Bylaws and standing rules, files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities in running a PTA
- Duties of each officer and chair
- California State PTA policies, procedures and resources
- PTA council and district information
- Community resources

To expand your skill sets as a leader, plan to attend PTA council/district training along with the other members of your board.

Start recruiting chairs and committee members, selecting first those whose work begins right away such as programs, budget, membership and communications.

Encourage experienced and new members to get involved and share the workload to grow leadership for today and tomorrow.

**Networking** – Soon after election, meet with the current president to talk about your new role, what works well and what needs to be tweaked to make your PTA even better.

Discuss ways to share information and files among outgoing and incoming board members to ensure a smooth transition. Encourage officers-elect to also meet with their successors before the term starts.

Get connected by participating in meetings with your council/district PTA, principal and community partners. And, as a unit delegate to the California State PTA

convention, take part in your PTA district's convention orientation.

**Board Orientation** – Arrange for the incoming board to meet to begin organizing for the new term. Schedule this meeting before the term begins, if possible. Meetings before the term starts are meetings of the board-elect.

To help select what PTA activities to focus on, encourage everyone to assess last term's programs and efforts. That way, you don't need to reinvent the wheel in making your plans.

At your board orientation, take time as well to:

- Set ground rules for meetings
- Identify two to three priorities as a team to make a difference in your school community
- Review your Bylaws and standing rules that are specific to your PTA
- Check the Insurance Guide for the Green-Yellow-Red Light activities a PTA can sponsor
- Get to know each other better and build relationships

At orientation, your board can also ratify the officers, chairmen and committee members appointed by the president and fill any vacant board positions so they can begin their activities. This may also be done at the first board meeting after the term begins.

**Important Tasks** – At the start of the year, submit a board roster, with names and contact information, to your council or district PTA. The president, treasurer, and secretary information must include a valid mailing address and email. All communications from the State PTA are sent to the president's address.

Coordinate with the treasurer-elect to follow the unit's banking institution guidelines to update the signature cards for all PTA bank accounts.

Obtain any usernames and passwords for access to the PTA website, social media and online services.

Be mindful of all PTA deadlines and due dates from council, district, and state. A calendar of dates should be provided to you by your district/council and a state calendar is provided in the summer welcome mailing

## **Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings

- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

## How Tos

### Running Your PTA – Monthly Activities

As the team leader, the president oversees and coordinates the work of the executive board in running a PTA.

Here are some tasks that, typically, the president works on each month.

#### Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Chair board meetings, following the agenda to keep everyone on task
- Review board reports including those prepared by the treasurer, financial secretary and membership chair plus the secretary's minutes from board meetings
- Sign PTA checks and authorizations for payment along with another, designated board member

#### Collaborating:

- Touch base with other team members about their plans and preparations for upcoming events
- Meet regularly the principal to share information on PTA and school activities and to clear all PTA written materials before publishing in hard copy or posting online
- Ensure that PTA volunteer hours are recorded and tallied for the Annual Historian Report

#### Communicating:

- Update board, members and community stakeholders on PTA plans and activities, encouraging input and feedback
- Thank PTA volunteers for their time, talents and efforts
- Promote outreach, inclusion and diversity to connect families, school and community

### Managing Meetings – Quick Tips

PTA surveys tell us that members say meetings are effective when they know why they are meeting, believe their time was well-spent making decisions and feel they accomplished something at a meeting.

That's why the president's primary role at meetings is to act as a facilitator to set the tone and manage PTA business in an effective way. And, the main role of the board is to come prepared and assist the president in working through the agenda.

Here are some ways to help make meetings more effective and productive:

**Before A Meeting** – As part of your preparation, consult with other board members to identify the meeting's chief objectives, activities to engage participants and who will present verbal and written reports. This helps determine what to include in the agenda that you'll create for the meeting.

Send the agenda to participants ahead of time and widely publicize the purpose of the meeting.

To boost participation, add social time before or after a meeting for everyone to network. And, recruit interpreters and translate handouts in home languages for your meetings.

**At A Meeting** – Successful meetings give you an opportunity to inform, inspire and empower members. To run an effective meeting, keep everyone on track and time by following the agenda. The parliamentarian can assist with time-keeping and noting the names and order of speakers.

As the facilitator, it's also important to remain fair and unbiased so everyone feels welcome and able to participate.

At the end of the meeting, take time to summarize what was accomplished and important next steps for business items.

**After A Meeting** – Share the results of the meeting with participants to keep them connected to the work of your PTA. And, follow up with officers and chairs on next steps and action items to complete tasks and accomplish goals.

### Working With Administrators – 6 Effective Ways

School leaders and the PTA represent two important groups on the school campus: staff and parents. They work closely together at a school site as partners in education to support student success.

To nurture this important partnership:

1. **Set the Tone** – Build a relationship and collaborate together.
2. **Two-Way Communication** – Meet with the principal early in the year and keep him or her updated on events, activities or concerns.
3. **Collaborating with the School** – Be aware of the school's improvement needs and encourage PTA members to actively participate in school site councils, governance teams, or related committees.
4. **Training Opportunities** – Offer to provide parent training and resources at the school.
5. **School District Level Involvement** – Use the school district's master calendar to become aware of activities where PTA's presence is needed and request an opportunity to provide a presentation at school board meetings.

6. **Build a Strong Team** – Ask for the principal's help in encouraging staff to become PTA members. Learn from others and share your knowledge as well.

## Other Useful Information

### Resources:

#### California State PTA – [www.capta.org](http://www.capta.org)

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

#### Online Services:

- MyPTEZ-Officer Contact System – To enter officer and board member information and generate useful reports
- MYPTEZ Accounting Software – To handle PTA accounting needs and generate financial reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

#### National PTA – [www.pta.org](http://www.pta.org)

- Run Your PTA tab and more
- E-Learning Workshops
- 

05/2025