




President Training



Your key to successful
leadership begins with
knowledge:
Knowledge about PTA and
knowledge about yourself

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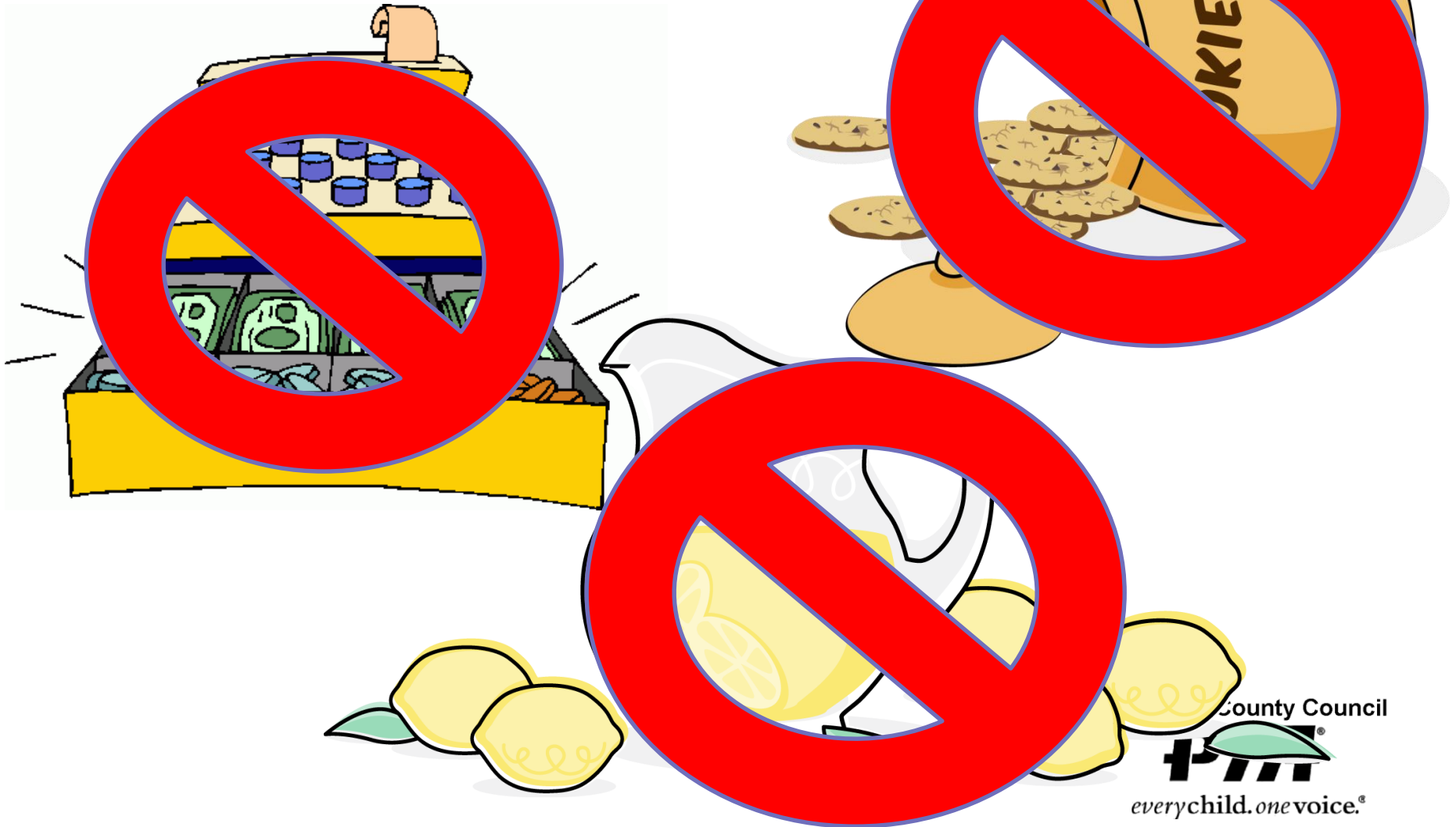
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The Purpose of PTA

IS PTA?



The Purpose of PTA is



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What is a PTA unit?

Local PTA Unit

- 501c3 non profit organization
 - File 990 annually (Nov 15)
 - normally exempt from paying Federal Income tax
 - Can receive tax deductible contributions (including membership)

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Local PTA Unit

- Registered Business in state of MD
 - File Personal property tax annually (Apr 15)
- Secretary of State
 - Registration depends on Gross Income
 - Registered as a licensed non-profit for the purpose of fundraising

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PTA is not

PART of:

- BCPS - Baltimore County Public School System
- BOE – Board of Education



Which means?

Separate legal entity from the school system chartered by MDPTA, but we use the school as our base of operation



Now what?



TRANSITION CHECKLIST

- Financial Review/Audit
- Insurance
- Procedure Books
- Accounts and Passwords
- Bank Accounts
- Combinations

TRANSITION

- Financial Review/Audit
 - Audit Committee should have been created at last BOD meeting
 - Meet after July 1
 - Due to MDPTA by Oct 31
- Insurance
 - Coverage period July 1 to June 30
 - Liability, Directors and officers
- Procedure Books

TRANSITION

- Accounts and Passwords
 - Email account
 - Social media tools
- Bank Accounts
 - Turn over check book and Treasurer material
 - Update signers
- Combinations



Basic Operation

COMMUNICATION

- President is the spokesperson for the PTA.
 - All communication goes through them
 - They designate alternate spokespersons
- Principal (or designee) approval

SUMMER PLANNING

- Goals
- Budget
- Meet with Principal
- Meeting Calendar
- Fill committee chairs

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PROGRAMS VS. FUNDRAISERS

- Programs
 - Educational component
 - School/Community Support
 - Can raise money & make a profit
 - i.e Reading Program & Spirit Wear
- Fundraisers
 - Simply getting money
 - i.e Yankee Candle, Gift Wrap

1ST GENERAL MEMBERSHIP MEETING

- Financial Review
- Budget
- Calendar

DUES

- State & National
 - Paid monthly
 - Based on memberships sold that month
 - **No refunds for overpayment**

- Council
 - Based on membership from June 1 to May 31
 - Due Oct 1

BASIC OPERATIONS

- Facilities Use
- Insurance
 - July 1 thru June 30
 - Knight Insurance Services formally BB&T
- Crowd Management Training
 - <https://crowdmanagers.com/training/>
 - \$19.95
- Mailbox at the school
- Flyers, newsletters and emails

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Basic Operations: Bylaws

- Bylaws are the rules the local unit must follow. They are adopted and amended by a vote of your unit's members at a general meeting.
- PTA bylaws may not conflict with the bylaws of National PTA or the state PTA and they cannot conflict with state or federal law

Basic Operations: Bylaws

- Any member has a right to view your bylaws.
- Your entire board should have their own copy
- The structure of the local unit

Basic Operations: Bylaws

- Information on required meetings(may include how meeting notification is given)
- Requirements for a nominating committee
- How and when to conduct elections
- Dates for the fiscal year
- Requirements of a quorum for conducting business

Basic Operations: Plan of Works

- Non specific plan
- Specifies
 - Committee members
 - task
 - Projected expenses

Basic Operations: Procedure Books

Contains

- Bylaws
- Standing rules (if used)
- Plan of work
- Timelines
- Contact information
- Review of Activity (What worked, what did not work)



Types of Meeting

- Executive Committee
- Board of Directors Meeting
- Committee
- General Membership

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Executive Committee

- Consists of elected officers:
 - President
 - Vice President(s)
 - Secretary(ies)
 - Treasurer
- Responsibilities defined in bylaws
- Must be members of the local unit

Board of Directors

- Consist of:
 - Officers (Executive Committee)
 - Principal
 - Standing Committee Chairs
 - Others individuals as defined in bylaws
- Responsibilities defined in bylaws
- Must be member of the local unit

Committee Meeting

- Consists of:
 - Individuals appointed based on bylaws and standing rules
- Responsibilities
 - Submit a Plan of Work
 - Plans the activity
 - Updates the Procedure Book

General Membership Meeting

- Consists of:
 - All individuals who have a paid membership
- Responsibilities defined in bylaws

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Meetings

- All meetings must meet quorum in order to vote on business
- Unless a specific number is given, quorum is either a majority of the members or one (1) more than half of the members

Agenda

Sample Meeting Agenda

PTA: ABC Middle School PTA, General PTA Business Meeting

Date: September 6, 2014

Time: 7:00 p.m.–8:00 p.m.

Call Meeting to Order/Welcome

Approval of the Minutes

Reports of Officers (try to limit to 2-3 minutes of highlights, put the rest in writing for all to see)

Reports of Committees (same—2-3 minutes, in writing if more complicated)

Unfinished Business

New Business

Announcements

Adjournment



Responsibilities of the Officers

President

- Elected to direct the affairs of the association
- Presiding officer
 - Determines the agenda
 - Calls the meeting to order
 - Encourages members to participate
 - Maintains a fair and impartial position
 - Takes no part in any discussions while presiding
 - Refrains from expressing personal bias when giving information to the association
 - Signs contracts for the PTA

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Vice-President

- In the absence of the President, the vice president serves

Secretary

- Keep accurate records of the proceeding
- Custodian of all records
 - Keeps copies of all officer & committee reports
 - Records all business transacted at meetings
 - Reads or distributes copies of the minutes

Treasurer

- Receives and disburses all funds based on an approved budget
- Prepare appropriate federal, state and local forms

Committees

- Standing
 - Perform a continuing function
 - Operates year round
 - i.e. membership or hospitality
- Special
 - Appointed as needed
 - Performs a specific task
 - Set end date or time frame of existence

Resources

- National PTA
 - Website (PTA.org)
 - Leadership Kit (www.PTAKIT.org)
 - e-Learning Courses
 - Fundraising Marketplace
- MD PTA Leadership Kit

Remember

- PTA is a business
- You have a family outside of PTA

Questions?

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