

# 2020 Jeffco PTA President's Training



*Be Accountable*

*Be Transparent*

*Be Diligent*

## **The president shall:**

**a. preside at all meetings of this local PTA/PTSA, board of directors and executive committee;**

**\*b. serve as an ex-officio member of all committees except the nominating committee and the financial review/audit committee;**

**c. coordinate the work of the officers and committees of this local PTA/PTSA in order that the purposes may be promoted;**

**d. appoint standing and special committee chairs with the approval of the( board of directors or executive committee, if you have one), with the exception of the nominating and financial review/audit committees chairmen;**

**e. appoint special committees, as needed, with the approval of (board of directors or executive committee, if you have one).**

**\*f. appoint the PTA/PTSA liaison to the school's accountability committee, with the approval of (board of directors or executive committee, if you have one. This may or may not be an appointed officer).**

**\*g. sign all contracts; and**

**h, perform such other duties as may be provided for by these bylaws, prescribed by the parliamentary authority, or directed by the board of directors or exec committee**

# PTA Basics

- PTA Mission: To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- PTA Values:
  - Collaboration
  - Commitment
  - Diversity
  - Respect
  - Accountability

# Bylaws

- Bylaws are the governing rules of the association and include:
  - Local Unit PTA/PTSA Name
  - Officers
  - Standing/Special Committees
  - Meetings
  - Quorum
  - Nominations, elections, vacancies
  - Finances

# Parliamentary Procedure

- A set of rules for conducting orderly meetings
- Most PTA's use Robert's Rules of Order or Bob's Rules
  - Ensures consideration of one item at a time
  - All sides are heard
  - Everyone has an opportunity for input
  - Majority rule

# Procedure Books

- Should be kept by each officer and committee chair
- Include items frequently used such as position description, bylaws, standing rules, calendar, minutes, forms, and contact list(s)

# 501(c)(3)

- IRS classification that the organization is organized and operated solely to accomplish a charitable purpose or mission
- Regulations:
  - File appropriate annual 990 form
  - Ensures no single individual benefits from PTA funds
  - Abstain from supporting or campaigning for a candidate for public office
  - Limit time and money spent to influence legislation
  - Limit fundraising from trade/business unrelated to PTA mission and purpose

# Your Bylaws Have the Answers!

- Keep a copy of the bylaws!
- READ THEM!
- Know when they need to be updated
- Know where to obtain a copy if they are misplaced



# Basic Policies

The association shall be  
noncommercial, nonsectarian,  
and nonpartisan

# Noncommercial

- May not engage in business that is unrelated to purposes of PTA
- Cannot endorse products, companies, or foundations
- May accept donations
- Be familiar with local, state, and federal requirements

# Nonpartisan

- Part of IRS code
- May propose, support, or oppose **legislation** or ideas
- May **not** propose, support, or oppose **candidates**
- WE ARE FIRST AND FOREMOST AN ADVOCACY ORGANIZATION
- We are not a fundraising group, we are advocates for funds for our children and schools

# Non-Profit

- 501(c)(3) under IRS code
- Do not pay taxes on gross receipts
- May accept donations that are tax deductible for the donor
- No application fees for tax exempt status

# Non-Profit Responsibilities

- Must adhere to Purposes
- Required to keep correct and orderly financial records
- Required to conduct annual audit (financial review)
- Required to file appropriate 990 IRS forms

# Standing Rules

- Details not already found in the bylaws
- Ensure they do not conflict with bylaws
- Help to derail conflict
- Adopted by the body they will impact
- Can improve efficiency
- Use caution in creating TOO many Standing Rules

# Who is the PTA President?

- Chairs board and general meetings
- Oversees financial compliance
- Serves as a liaison with school administration and community partners
- Checks in regularly with officers/committees to ensure the overall plan is on target
- Identifies challenges and invites solutions

# Who is the PTA President?

- Is familiar with PTA programs and resources
- Represents PTA in the community
- Recruits and mentors volunteers and future leaders
- Volunteers at events, when available

GREAT presidents have leadership, planning, and public speaking skills and experience!



# Who is the PTA Vice President?

- Implements duties delegated by the president
- Represents the president in his/her absence
- Performs specific duties as detailed in the bylaws
- Is familiar with PTA programs and resources
- Is preparing for leadership by completing/attending additional training offered by council, region, state or National PTA

# Goal Setting

- In order to know where we are going, we need to know where we have been... however...
- Consider surveying your school - ASK FAMILIES  
WHAT THEY WANT!

# Prepare a Budget

- Use your goals as a guide
- Consider the previous year's budget
- Present the draft budget for approval
- Follow the budget
- Know how to amend the budget

# Appropriate Use of PTA Funds

- Insurance
- Leadership Development and Training
- Programs / Assemblies
- Recognition Awards for Student Achievement
- Curriculum Enhancement
- Equipment
- After-school Programs

# Fundraising

- PTA is NOT a money making or money raising organization
- Material aid to school is not a primary function of PTA
- Must support purposes and never exploit children
- Protect PTA name and tax-exempt status
- Remember the 1-3 rule
- Plan first, then fundraise - not vice versa

# The Take Home Message About PTA Funds

## Whose Money Is It?

# Running a PTA Meeting

- Schedule meetings at convenient times
- Set an agenda (see Sample Agenda handout) and send it out ahead of time
- Set ground rules
- Begin and end on a positive tone
- Ensure a quorum (see your bylaws)

# Running a PTA Meeting

- Stay on track and on time (picture yourself as a conductor)
- Ensure everyone has an opportunity to speak
- TAKE MINUTES!
- Consider taking the Parliamentary Procedure e-learning course
- Stick to business, committee work should be completed in committees



# Growing Your Membership

- Leading your PTA begins with relationships
  - Know your personal “why”
  - Listen to and understand the perspectives of others
  - Value time
  - Support your membership chair in recruitment activities
  - Educate yourself and your members about member benefits

# Programs, not Committee Meetings

- Share program ideas you have to encourage attendance and advocacy
- What will help your students?
- What will help families?
- What will help your school staff?

# Where to Find Support

- Jeffco PTA [www.jcpta.org](http://www.jcpta.org)
- Your Articulation Area Vice President [aavp@jeffcopta.org](mailto:aavp@jeffcopta.org)
- Colorado PTA
- National PTA E-Learning Courses [www.pta.org](http://www.pta.org)
- Our Children Magazine
- Previous PTA officers
- Conventions and trainings
- National PTA Quick Reference Guides

# Questions?



THANK  
YOU for all  
you do



to ensure every  
child's potential  
is a reality!

