

**PTA Leadership Training**

Leading Your PTA

Hosted by Louisiana PTA  
 LouisianaPTA.org/president  
 president@LouisianaPTA.org

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**Why are we here?  
 Why do you PTA?**

To make every child's potential a reality  
 by engaging and empowering families and communities  
 to advocate for all children.

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**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.

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### Where to start? With Sign-Ups & Downloads

- Visit **LouisianaPTA.org** – become familiar with the website
- Create an account at **PTA.org** and **create an account**. There is lots of information plus e-Learning and Thrive training.
- Register at **LouisianaPTA.org/submit-officer-data-1**. This is required and will allow you to receive LAPTA emails and e-newsletters.
- All officers need to be **PTA members** of their Local PTA Units -- this also makes you a LAPTA and National PTA member.

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### Local Unit PTA Structure

#### Your Leadership Team

#### Executive Committee

- Elected Officers

#### Board of Directors

- Elected Officers
- Principal (or his/her designee)
- Parliamentarian (appointed)
- Standing Committee Chairs
- Special Committee Chairs
- Other members as designated by the Standing Rules

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### LAPTA Organizational Structure

Local PTA Units



Louisiana PTA



National PTA

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**Basic PTA Information**

<p><b>Identification</b></p> <p><b>EIN</b></p> <ul style="list-style-type: none"> <li>• Issued by IRS</li> <li>• Identifies your PTA as a 501c3 (nonprofit)</li> <li>• Akin to SSN (xx-xxxxxx format)</li> </ul> <p><b>LOCAL UNIT ID</b></p> <ul style="list-style-type: none"> <li>• Issued by NPPTA</li> <li>• Identifies your unit within PTA</li> </ul>	<p><b>Requirements to be in Active Affiliation</b></p> <ul style="list-style-type: none"> <li>• Officer Data online at <a href="https://louisianapta.org/submit-officer-data-1">https://louisianapta.org/submit-officer-data-1</a></li> <li>• Proof of Membership Dues Submission</li> <li>• Cover Sheet of Current Bylaws</li> <li>• Proof of 2020 Tax Filing and accepted IRS Form 990</li> <li>• Local Budget Approval Form and Approved Budget</li> <li>• Audit Committee Report</li> <li>• Annual Report of the Articles of Incorporation</li> <li>• Proof of Insurance (optional – required for 2023-2024)</li> <li>• Leader Training Certificates</li> </ul>
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**What does it mean to be a 501(c)(3)**

- Upon chartering, local units receive their 501(c)(3) status
- LAPTA issues an annual Validation letter after your Active Affiliation files are accepted
- Must adhere to bylaws that promote/exclude certain activities
- Funds spent to support mission & goals; not distributed to stakeholders or spent in an unethical manner
- Can earn profit (“carryover”) to further the mission
- Don't earn program money for other organizations

***Fundraising should not be your primary focus!  
Protect your 501(c)(3) status – it's valuable!***

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**So ... what am I supposed to do now?**

**PTA President = Leader, Manager, Advocate, Team Member**

- ✓Protect Assets & Reputation
- ✓Promote PTA values & strategic initiatives
- ✓Set goals & work to achieve those
- ✓Provide leadership
- ✓Use filter of “what's best for the children”?
- ✓You are a role model

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**Your Leadership Style**

**Ingredients to Being an Effective Leader**

- ✓ Involve others
- ✓ Build consensus
- ✓ Establish atmosphere of cooperation
- ✓ Show respect and appreciation for volunteers
- ✓ Ask for help; delegate

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**Action Items**

- Work with your BOD to determine which PTA programs you want to host before presenting to principal
- Schedule time in your calendar to visit the LAPTA and National PTA websites
- Review your requirements for Active Affiliation
- Review your communications platforms
- Meet regularly with your Membership VP/Chair
- Schedule regular meetings with your principal
  - \* Review the goals of school over the course of the year
  - \* Discuss what PTA programs can be implemented to support the school's goals
  - \* Bring member feedback
- Remember to schedule time for yourself and your family!

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**Effective Meetings**

- Call to Order/Welcome
- Mission statement – Why are we here? Why do we PTA?
- Secretary's Report (quorum, minutes)
- Treasurer's Report
- President Report
- Principal Report
- EC and/or BOD Report
- Unfinished Business
- New Business
- Program
- Announcements
- Adjournment

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**Effective Meetings .. But wait, there's more!**

**Best Practices**

- Don't "Meet for the sake of meeting"
- Have a purpose and communicate that purpose
- Provide agendas and prep your materials.
  - Remind members to review items sent to them and be prepared.
  - Print agendas for general meetings
- Add icebreakers to your meetings
  - Provide a way for people to get acquainted and feel included
- Start and end on time

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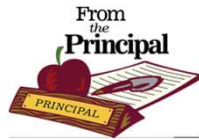
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**The PTA & Principal Relationship**

- Is a member of your PTA team. They sit on your Board of Directors.
- Wants to connect school goals to the work of your PTA to benefit students, families & the community.
- Does not control PTA funds.
- Provides the forum for PTA to operate. Be respectful of that relationship



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**Promote Your PTA**

- Use the PTA logo on everything
- Make it easy for people to join your PTA
- Evaluate your communications plan. Identify weaknesses and develop a strategy to address
- Develop a "1-pager"/palm card
- Make everyone feel welcome
- Send thank you notes and recognize volunteers publicly
- Give credit to your PTA for hosting programs. "Courtesy of the XYZ Elementary School PTA" (with logo)
- Communicate consistently
- Set the example - greeting, Email signature, personal correspondence

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### Basic Financial Management

- Membership-approved budget
- Appropriate use of PTA funds – your PTA is not an ATM
- Clear procedures that EVERYONE knows and follows!
  - No blank checks
  - Debit card managed like a check
  - 2 signers for every check
  - Checks written only with documentation
- Prompt bank reconcilements
- Purchase insurance
- Maintain incorporation
- Remit dues monthly
- Be aware of your PTA's financial situation. You will be close to your treasurer!

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### Bylaws

- Bylaws are the fundamental governing rules of a PTA.
- They contain the basic rules related to conducting the unit's business and governing its affairs.
- The bylaws:
  - Define the primary characteristics of the organization
  - Prescribe how the association functions
  - Includes all rules considered important to the rights and responsibilities of membership.
- The Bylaws template created by LAPTA includes required language which cannot be changed by the local PTA.
- The customizable areas are changeable by the local PTA to best meet their needs.
- Download the Bylaws template at LouisianaPTA.org/bylaws.
- Amendments to the customizable areas may occur at any time and require approval by the General Membership at a meeting with twenty days (20) notice and then final approval by LAPTA.
- Once approved, Local Unit Bylaws expire in three years from the LAPTA approval date.

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### President's Binder

- Board roster with contact information
- Confidentiality, Ethics, and Conflict of Interest Policy signed by the Board of Directors
- Committee rosters with contact information
- Bylaws and Standing Rules
- Membership roster
- Calendar with school, PTA, and LAPTA dates and deadlines
- All agendas/minutes from meetings: Executive Committee, Board of Directors, and General
- Secretary of State Articles of Incorporation Annual Report

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**Review - today you have covered:**

- Why do we PTA
- Basic PTA set-up / governance structure
- Active Affiliation / 501(c)(3)
- Effective Meetings
- PTA and the Principal
- Promoting PTA
- Communications and Social Media Guidance memo
- Tons of resources available on the LAPTA and National PTA websites

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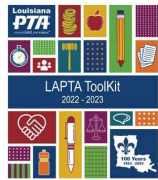
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**Any questions?**



President  
2022 - 2023  
Section 2

**One Last thing .....**

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**LAPTA is in search of our missing members on the Executive Committee:**

- Secretary
- VP Affiliation
- VP Diversity, Equity & Inclusion
- VP Arts Education
- VP Membership
- VP Leadership Development



Apply here

Email us at [president@louisianapta.org](mailto:president@louisianapta.org) if you are interested in learning more about volunteering at the state level

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