PTA Leadership Training

Leading Your PTA

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

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.

**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.
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. 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.

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

LAPTA Organizational Structure

Local PTA Units

Louisiana PTA

National PTA
Basic PTA Information

**Identification**
- **EIN**
  - Issued by IRS
  - Identifies your PTA as a 501(c)(3) (nonprofit)
  - Akin to SSN (xx-xxxxxxx format)
- **LOCAL UNIT ID**
  - Issued by NPTA
  - Identifies your unit within PTA

**Requirements to be in Active Affiliation**
- Officer Data online at [https://louisianapta.org/submit-officer-data](https://louisianapta.org/submit-officer-data)
- Proof of Membership Dues Submission
- Cover Sheet of Current Bylaws
- Proof of 2020 Tax Filing and accepted IRS Form 990
- Local Budget Approval Form and Approved Budget
- Audit Committee Report
- Annual Report of the Articles of Incorporation
- Proof of Insurance (optional – required for 2023-2024)
- Leader Training Certificates

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!*

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
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

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!

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
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

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

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
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 reconciliations
- Purchase insurance
- Maintain incorporation
- Remit dues monthly
- Be aware of your PTA’s financial situation. You will be close to your treasurer!

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
  - Include 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.
- 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.

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 Membership
- Secretary of State Articles of Incorporation Annual Report
President’s Binder, cont’d:

- Insurance policy
- IRS Tax filings
- Approved budget, Budget Approval Form, budget reports from meetings / Audit Reports
- Accounts & passwords summary sheet / Record of all debit cards and their account numbers
- Expense Forms and Deposit Forms
- Inventory Accountability Form
- Miscellaneous papers, including correspondence

Communications & Social Media

More assistance is available at:
https://www.pta.org/local-leader-kit/communications

National PTA shares tips and best practices to effectively share messages with fellow PTA members, school staff and administrators, community members, and the media.

Communicate to share the work of PTA

- Newsletters
- Website
- Social media platforms
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

Any questions?

One Last thing .......

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

Email us at president@louisianapta.org if you are interested in learning more about volunteering at the state level