
President and VP

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LouisianaPTA.org/president

Sign Ups & Downloads

Register at **LouisianaPTA.org/register**. Download the current toolkits at **LouisianaPTA.org/toolkits**. Create an account at **PTA.org** which has lots of information, programs, grants, and e-learning (Thrive.PTA.org). Affiliation Report is due October 31. See **LouisianaPTA.org/affiliation**. Get a binder to organize your files. Online file sharing is a bonus.

PTA Basics

All officers must be members of their Local PTA Units, which includes membership in LAPTA and NPTA. The Board of Directors consists of the Executive Committee (elected officers), principal, committee chairs, and other positions like Parliamentarian and Historian. EIN is your Employee Identification Number issued by the IRS. LUR is your Local Unit Registration Number issued by National PTA. You must adhere to your Bylaws and keep them up to date. See **LouisianaPTA.org/bylaws**. The PTA's money must be separate from the school, and used to support the mission and goals of PTA. Use the filter, "What's best for the children?" Most school boards do not allow their employees to handle PTA money. Use **Talking Points for Teachers App** to text families and for automatic translation services. Recipients do not need to download the app.

President's Role

The President is the PTA's leader, manager, mediator, team member, role model, facilitator, and advocate. VPs' role is to support the President with any other duties set by the PTA which frequently includes membership. Be an effective leader by involving others, building consensus, fostering cooperation, showing respect, appreciating volunteers, delegating to others, asking for help, and seeking future leaders. Schedule the monthly Board of Directors Meetings and the General Membership Meetings well in advance. Read your Bylaws to see when meetings are to be held and to know the meeting quorums in Articles VIII and X. Pick programs and fundraisers that have the support of the Board.

Build a Relationship with the Principal

Principals want the PTA's work to be aligned with the school's goals which benefit the students and school. Meet with them frequently. Communicate often. Always respect the relationship with the principal as they provide the forum for PTAs to operate. Know what they want from you before acting. They do not control PTA funds and cannot sign PTA checks. The budget as approved by the General Membership declares where the money will go. The principal is a Board Member who has one vote on the Board. They do not dictate how the PTA spends its money and cannot receive PTA funds for unspecified purposes.

Financial Basics for Nonprofits

- The annual budget must be approved at a General Membership Meeting.
- Use an online accounting system to track finances every year, such as MoneyMinder or Wave Apps.
- Document all expenses with an Expense Form with a receipt and kept in the Treasurer's digital or physical binder.
- All checks require two signatures. Debit card purchases need two signatures on the Expense Form (not allowed in Caddo).
- Blank checks and checks payable to cash are not allowed unless you are getting petty cash at the bank.
- Reconcile bank accounts monthly. Review and signed bank statements by a nonauthorized person.
- Have a Budget Report at all meetings. See the Treasurer's Toolkit to understand all policies and procedures.

Promote Your PTA

Use the PTA logo on everything. Give credit to your PTA for hosting programs. Spell out Parent Teacher Association sometimes, especially for PTSAs. Make it easy for people to join PTA. Offer online purchasing on Givebacks.com or another platform. Communicate consistently and intentionally with your families and use social media wisely. Welcome everyone. Always be looking for the next leaders and ask people to join. Send thank you notes and recognize volunteers publicly.

Hold Effective Meetings (LouisianaPTA.org/meetings)

Use Roberts Rules of Order at **RobertsRules.org**. See robertsrules.com/frequently-asked-questions. Always have an agenda and current financial reports. Know your quorum. Start and end on time. Keep meetings as short as possible with long discussions occurring outside of the meeting. Add icebreakers to help people get acquainted. Hold General Membership Meetings before or during highly attended school events or in conjunction with a PTA program.

- In Board Meetings of about 12 or fewer attendees and in committee meetings, the President may make motions, vote, and debate. If the meeting has more than 12 people, the chair needs to be impartial and may not make motions, debate, or vote (except with a ballot vote or if their vote will affect the result.)
- Use **Unanimous Consent** to reduce the time needed to pass a motion if a matter is minor or opposition is unlikely. “By unanimous consent, I’d like to make a motion that [details]. Do I have a second? Is there any objection?” If all members remain silent, the chair says, “Hearing none, the motion passed by Unanimous Consent.” If a member disagrees, they say, “Objection.” The chair then allows for discussion and takes a vote in the usual way.
- Only members may participate in making motions, engaging in debates, and voting. Let attendees know the rules.
- If discussions become contentious, establish debate guidelines. Maintain your composure. Do not respond by shouting.
- If there are whispers, remain silent to regain the audience's attention.
- If confronted with challenges to integrity, avoid defensiveness. Maintain a good sense of humor.

Common Challenges and Their Remedies

- **Communication:** Communication is key. Using Talking Points for Teachers App for mass texts. At the first BOD meeting of the year, lay the foundation for a fun, happy PTA by saying, “If you feel excluded or get your feelings hurt, there is probably a misunderstanding somewhere. Everyone is always included. Please give the others the benefit of the doubt if your feelings are ever hurt. Talk to them about it. You can trust my motives that we are on the same team.” Communicate directly and often with your principal, Board, and families. See more details under *Successful Leadership*.
- **Finding Volunteers:** Ask teachers which parents are helpful. Have a grandparent event and ask them to join PTA and to volunteer. Form relationships with parents. Talk to people at the school events and let people know you can’t do it alone. Give people options on how and when they can help. Acknowledge and thank every volunteer! Get the community involved. Share the school’s policy on volunteering – where, when, and how.
- **Increasing Membership:** Ask, ask, ask; you’ve got to ask more than once; share all that the PTA did the previous year and what PTA will do this year IF you have their support. Compare the cost of membership to a coffee or two. Can they offer up a coffee for the benefit of all the students? Louisiana Lagniappe PTSA uses the phrase “Join for less than the cost of beignets with café au lait!” Ask like-minded groups in the community. PTAs can pay dues for people, such as offering to pay dues if someone volunteers at an event.
- **Affiliation:** Use Givebacks.com to upload files. Don’t wait until the last minute. Ask LAPTA for help. Have others assist.
- **Burnout:** Pace yourself. Family comes first. Take Sundays off. Keep it fun. Many of us are givers and people-pleasers to our own detriment. Know when to step back. Take care of yourself. Your PTA work needs to be supported by the Board.
- **Difficult People:** Set boundaries. Don’t give them power over your happiness. Don’t pick up what they’re putting down. Be direct and brief when communicating. Use the new Termination of Membership for truly difficult people and know that it might lead to lawsuits. Consult your insurance company for proper coverage.

Fostering the Culture of PTA

Make school fun and engaging for everyone with some of the following ideas. Get create and have fun!

- Celebrate the joys of learning with a fun Popsicle Day using the cheap kind of popsicles.
- Include students by inviting them to attend PTA meetings. Give them a voice in activities and decision making.
- Welcome all parents by asking them to come as they are to join the PTA in building a stronger school community.
- Share all school events and assist parents with staying in the loop by using social media wisely.
- Support school groups by offering mini grants to fund their club or organization. Empower their creativity and leadership!
- Include the following on all flyers, emails or social media posts:
 - 🗨 Join the Movement! Be part of a PTA that’s fun, inclusive, and student-centered.
 - ✉ Contact: [Email and Phone]
 - 🔗 Follow Us: [Social Media info, Website]