

The logo features the acronym 'PTA' in a large, bold, blue, italicized sans-serif font. A registered trademark symbol (®) is positioned to the upper right of the 'A'. Below this, the tagline 'everychild. one voice.' is written in a smaller, blue, italicized serif font, also followed by a registered trademark symbol (®). The entire text is centered within a white circular area, which is framed by four dark blue corner pieces, each containing a light blue curved line that suggests the circle's edge.

PTA[®]

everychild. one voice.[®]



WELCOME

President's Workshop

**2009 Georgia PTA
Convention Leadership Training**



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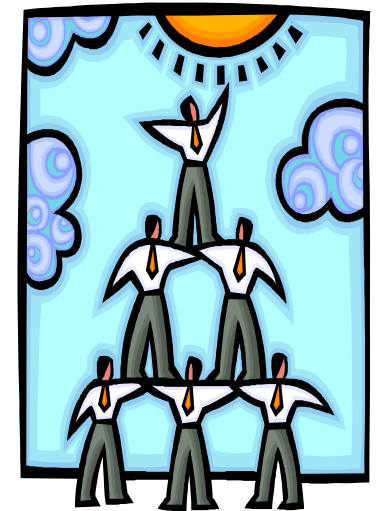
GROUND RULES

- Silence things that make noise
- Respect for all
- Relax, listen, and enjoy
- Questions?
 - Parking Lot, include *legible* email
 - At breaks, end, and as we can

**Download this PowerPoint @
www.georgiapta.org/leadership-president.html**

Building a Solid Foundation

- President = Team Leader
- Rules of the Game
- Leadership Team
- Planning
- Committees
- Principal and Staff
- Putting Goals into Action





Local PTA Unit

= chartered legal entity granted non-profit status by IRS under umbrella of Georgia PTA

Members

= shareholders or owners

Mission

= Children



PTA President

= Team Leader and Manager

Protects Assets...

Volunteer, Financial and Good Name

Achieves Goals...

Benefit children and increase family
engagement



Legal Responsibilities of Board Members

- Duty of Loyalty
- Duty of Obedience
- Duty of Care

Remember you are part of a team...



Team Responsibilities

- = Board as a Whole
- = Individual by Office or Position

Core Requirements of PTA

- = *“in good standing”*
- = IRS regulations and state laws
- = Insurance company

LEADERSHIP TEAM

Executive Committee

Officers

Principal or Designee

Parliamentarian



Board

Officers

Principal or Designee

Standing Committee Chairs

Parliamentarian

PTA Foundation

- Effective, cohesive leadership team
- Core mission and focused goals
- Maintain and grow membership
- Thriving, sustainable unit





GPTA Strategic Initiatives

Membership: We will retain and increase our membership.

Leadership: We will identify, develop, and affirm our present and future leadership.

Financial Viability: We will create and sustain long-term financial viability.

Organizational Effectiveness: We will improve organizational effectiveness.

Getting Started

*If you don't know the rules,
it's hard to succeed at the game.*

Refer to Bylaws and
Parliamentary Procedure Handout



Parliamentary Procedure

(Aka, Roberts Rules of Order)

= Insures order and
respect for all

- Appoint Parliamentarian
- Vote (in tie and by ballot)
- Ex-officio



P&P continued

Quorum =

Number of members required to be present to conduct business

Majority Vote =

More than one half the votes cast

Bylaws

= unit's governing rules



What do your bylaws say?

Who can see the bylaws?

What can you change
in your bylaws?

Meetings

- Have a purpose. **Share it!**
- Utilize school groups
- Follow and distribute agenda

Prepare first general meeting agenda

Use Agenda Worksheet

Conducting a Meeting

Agenda

Call to Order
Inspiration (nonsectarian)
Pledge of Allegiance
Minutes
Treasurer's Report
Correspondence
EC or BOD Report
Standing Committee Reports
Unfinished Business
New Business
News from Principal, NPTA,
GPTA and council
Program
Announcements
Adjournment

Hints

- **Don't call unnecessary meetings**
- **Have a purpose and communicate it**
- **Provide printed agenda**
- **Keep time to a minimum**
- **Start and end on time**
- **Know which committees need to report**



Management Style Leadership Style

- Communicate regularly and listen
- Involve others
- Establish atmosphere of cooperation
- Build consensus
- Show respect and appreciation for ALL
- Ask for help
- You're a role model

You're the chair, not "your majesty."

Administrative Duties

- EXPEDITE WORK of PTA
 - Set goals **and prioritize**
 - Develop calendar
 - Review progress and evaluate
 - Make sure PTA is represented at
-
- Encourage advocacy

Your Team = EC

- **Clarify expectations in writing**
- **Determine representation at:**
 - Advocacy Training, Sept. 25
 - Council meetings
 - District Conferences
 - PTA Day at the Capitol, Feb. 23
 - School board meetings
 - CLT, June 25-26

Refer to Sample Standing Rules

Vice President

- In absence of president
- Assists president
- Performs duties assigned by president
- Attends council, district and state functions
- Strengthens team to achieve goals
- Financial oversight

*What if you have **no**
or multiple vice presidents?*

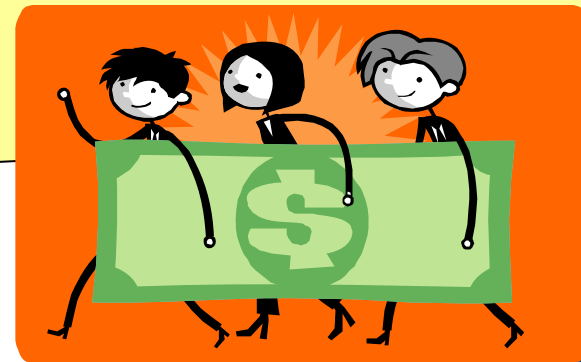
Secretary

- Minutes at all meetings
- Send meeting notices
- Prepares agendas
- Submits contacts online to GPTA
- Maintains membership lists
- Emergency check signer
- Custodian of records
- Copies bylaws for board
- Establishes quorum and counts rising vote
- Attends council, district and state functions
- Financial oversight



Protect your PTA Assets

The team is in charge of running a business.



Financial Management

- Membership approved budget
- Appropriate uses of PTA funds
- Explain procedures to others
- Follow procedures yourself
- 2 signatures on checks,
3 signers on file at bank
- Don't sign blank checks

Financial Management

- No cash payments
- Secure cash and checks
- Accurate documentation
- Prior approval for all expenditures
- Only President signs contracts
- Prompt bank reconciliations, 2 sign-offs
- Purchase insurance
- Maintain incorporation

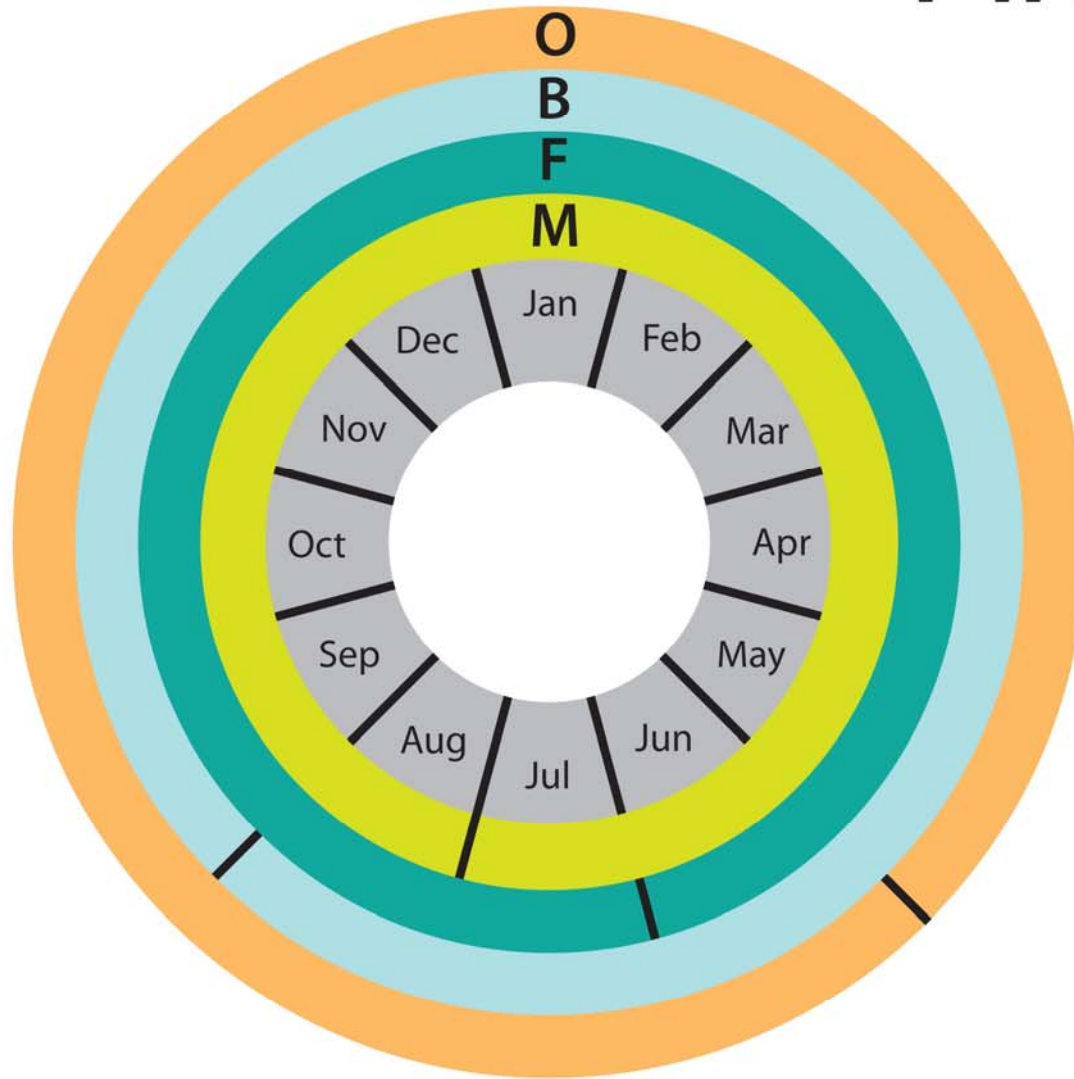




Financial Management

- Remit dues monthly
- Audit Report by 9/30 to GPTA
- Timely IRS filings for ALL units (990-N)
- No debit or credit cards
- Treasurer's Reports at every meeting
- Years (Fiscal, budget, school, term)
- Fundraising: Follow 3:1Rule

PTA Calendars



- M** = Membership Year
August 1 - July 31
- F** = Fiscal Year
July 1 - June 30
- B** = Budget Year
1st PTA mtg of sch. year
- O** = Officer Year
Last day of sch. year

FUNDRAISING

3-to-1 Rule



For every one (1) fundraiser,
at least three (3) non-
fundraising projects,
programs, advocacy work



Membership

- Membership is everyone's job all year
- Value of membership
- Card = Member benefits
- Budget
- Reach out, diversify
- Reward and thank members
- Remit dues monthly
- Membership roster (OMDR+)
- **Let's Go Green** = GPTA Theme

Promote PTA

- Use logo
- Brand everything
- Give credit to your PTA
 - Thanks to the PTA
 - Hosted by the PTA
 - Provided by the PTA

PTA is more than a meeting....

Logo and Tagline

Georgia
PTA[®]
everychild. one voice.

Give yourselves credit!

PTA[®]
everychild. one voice.®

Setting Goals And Planning



Refer to handout

*Standards for Family-School
Partnerships*



Making Plans

- Up to 3 focused, reasonable goals
- Driven by core mission
- Use ***Standards for Family-School Partnerships***
- Motivated by high positive return for children
- Weave goals into everything!
- Communicate them often and loudly
- Share progress

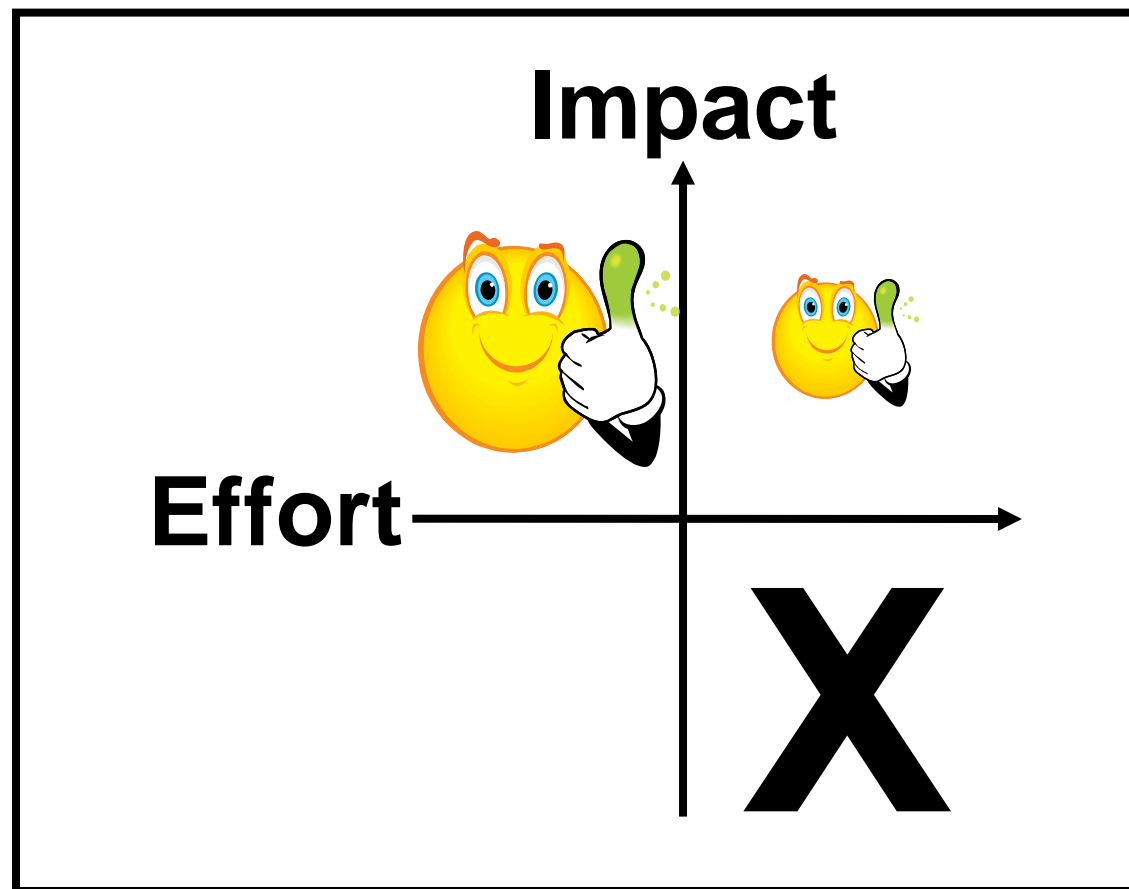


Standards for Family-School Partnerships

= HOW to increase parent involvement

- **Welcoming all families into school community**
- **Communicating effectively**
- **Supporting student success**
- **Speaking up for every child**
- **Sharing power**
- **Collaborating with community**

Evaluate





Committees

- How many do you need?
- Is the work a priority?
- Do you have the capacity?
- Standing vs Special Committees

Types of Committees

Standing Committee

Works in a certain area

Continuous service
e.g., Membership,
Legislation, Bylaws,
Parent Involvement

Special Committee

Formed for a specific purpose

When work is done, automatically goes out of existence
e.g., Nominating,
SPLOST, 10th Anniversary

What would you want to know?

- List of responsibilities – **What?**
- Key dates – **When?**
- Procedures, policies - **Do's and Don'ts**
- Available resources – **Help?**
- Budget – **How much?**
- Expectations – attendance, status reports, chain of command, plan of work – **How?**



Now what?

- Committees draft “Plan of Work”
- EC reviews
- Determine committee budgets
- EC and committee chairs agree
- Explain “Procedure Book”
- Review and modify as needed

Plan of Work

Procedure Book

Refer to LRG, page 184

QRG – PTA Presidents, page 37





Working Relationships

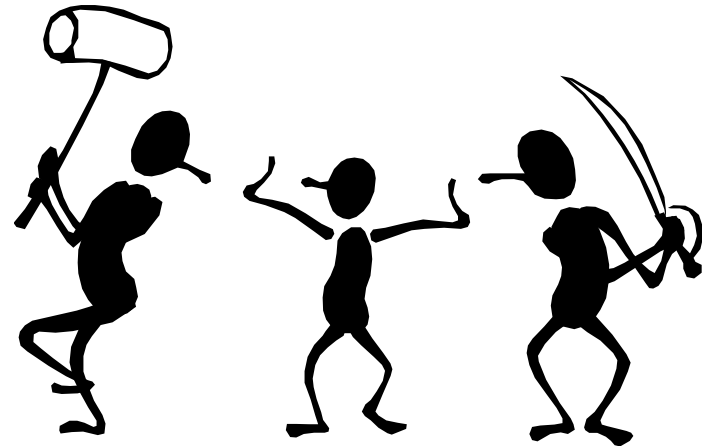
Good = everyone on same page

Bad = sometimes the same book,
different chapters

Ugly = not speaking the same
language

Conflict

Lose your focus
Time is wasted
Feelings are hurt
Perceptions are negative
Resources are spent unnecessarily
Opportunities are missed
Children pay the price for childish behavior



Principal



Has....

- huge job over entire school
- lives in a fish bowl

Does not....

- run PTA
- manage PTA funds

PTA \neq manager of school funds

Find Common Ground

- Clarify ground rules
- Know Principal's vision, goals and priorities – not “wish list” of stuff
- Form mutual goals
- Agree on action plan
- Revolve PTA work around goals



Put Goals into Action

- Use *Standards of Family-School Partnerships*
- Weave goals into everything
- Don't reinvent the wheel
- Don't overextend yourselves
- Evaluate and modify

Programs – the Easy Way

- Reflections
- Healthy Lifestyles
- Go Green
- Take Your Family to School Week
- Let's Fight Flu Together
- School Year's Eve
- PTA More
- ***PTA QRG - Programs***

2010

Reflections Theme:

Beauty is.....

Resources
Reports
Awards
Grants

Refer to handout





Advocacy Always

Georgia PTA

= Collective PTA voice at state level

- Sign-up for legislative updates
- Attend Advocacy Conference, Sept. 25
- Bring someone with you to PTA Day, Feb. 23



Advocacy

- Respond to action alerts (like last year's Popsicle campaign)
- Publish legislative articles in your newsletter
- Know what you can and cannot do in an election year about ballot issues and candidates
- Recap critical legislative issues for your PTA community

Leadership “Must-Do’s”

- Attend training
- Connect with Councils and Districts
- Use and share resources regularly
- Follow policies, procedures, and the law
- Be fiscally responsible
- Focus on the Mission and your goals
- Be team leaders and role models
- Evaluate

Be patient
Be determined
Set an example

Skills Recap

- Team Leadership
- Management
- Administrative
- Interpersonal



Don't be a
one person show