

The logo features the acronym 'PTA' in a bold, blue, sans-serif font with a registered trademark symbol. Below it is the tagline 'everychild. one voice.' in a blue, italicized serif font, also with a registered trademark symbol. The text is centered within a white circle that is partially framed by dark blue corners at the top and bottom.

PTA[®]

everychild. one voice.[®]



Welcome!

President's Workshop

**Convention Leadership Training
July 2011**

Workshop Presenters

Sheila Cornelius

2009 - 2011 President

presgapta@bellsouth.net

Donna Kosicki

2011 – 2013 President

bannrchic@bellsouth.net

Georgia PTA

114 Baker Street NE

Atlanta, GA 30308

404 659-0214

gapta@bellsouth.net

www.georgiapta.org



Ground Rules

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



Today's Handouts

Please take out your Leadership Resource Guide 2011-2012; break the plastic.

The LRG and other handouts are the materials for this workshop.

ALL handouts will be posted on the Georgia PTA website.



Workshop Objective

Given the materials and the time together during this workshop, participants will identify **at least** ten (10) best practices for a successful year as a PTA team.



Whom We Benefit & Outcomes

- Leaders
 - Quality and Quantity
- Parents and Educators
 - Two way communication, focused on the student
- Students
 - Achievement, success, career pathways, having options for a future



Stand *together*. Power *up*. Reach *out*.

Section 1 – Pages 7 to 10

- State Office
- PTA Mart
- Georgia PTA Awards and Grants
Deadline

Section 2 – Pages 11 to 42

- Introduction
- PTA Mission, Vision, and Values
- Basic Policies
- Structure and Organization
- Benefits of Membership
- Identity Campaign
- Basic PTA Management
- PTA Relationships
- Local School Councils
- NonProfit Board Management - new



NonProfit Board Management

- Governance
- Organizational Identity and Strategic Direction
 - Strategic Planning
 - Financial Oversight
 - Legal & Ethical Oversight
 - Individual Roles of Board Members
 - Board Members Job Descriptions

Local Unit PTA

- **Chartered legal entity** granted non-profit status by IRS under umbrella of Georgia PTA
- **Members** - shareholders or owners
- **Mission** – To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.



In Good Standing

- Adheres to the purposes and basic policies of the PTA;
- Remits the state and national portions of the dues, on a monthly basis;
- Has bylaws approved according to the procedures of its state; and
- Submits annual audit report to the state office by the last business day of September.
- *Shall submit annually to the Internal Revenue Service (IRS) the appropriate Form 990 by the applicable IRS due date.

GA PTA Statistical Report

Local Unit ID #	Natl ID Standing/Unit	Officers	Audit	Dues	990	Inc
	District: 12					
	Council:		Monthly			Annually, with GA PTA
201528	B Bethlehem ES PTA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Summary for County = Barrow (1 unit)						
2197	B Alps Road ES PTA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32880	B Barrow ES PTA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2464445	B Oglethorpe Avenue ES PTA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2350625	B Timothy Road ES PTA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Summary for County = Clarke (4 units)						

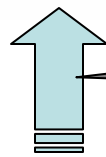
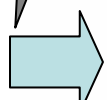
Local Unit ID #

These units are not served by a council

Due May 1st

Due Sept 30th

Filed annually by every PTA!
990, 990 EZ, 990 N



B=Bad
G=Good
We want all "G's"

Promote PTA

- Use logo and tagline
- 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.

PTA[®]
everychild. one voice.®



Section 3 – Pages 43 to 56

- Executive Committee
- Board of Directors
- President
- President Elect
- Vice President
- Secretary
- Treasurer

Leadership Team

Executive Committee

Officers

Principal or Designee

Parliamentarian



Board

Officers

Principal or Designee

Standing Committee Chairs

Parliamentarian

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 (recommended)

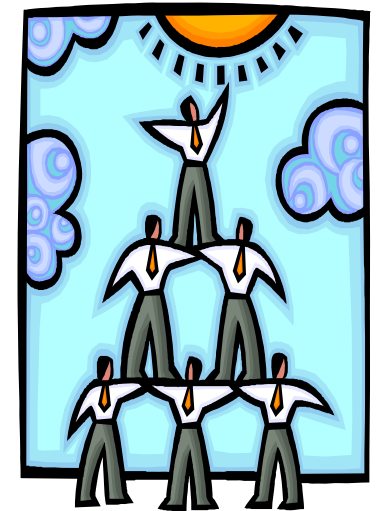


Legal Responsibilities of Board Members

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

Building a Solid Foundation

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





GA PTA 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.



Meetings

- Executive Committee
- Board of Directors
- General Membership
- Transition
- Community
 - Chamber of Commerce
 - Superintendent / School Board

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**



PTA President

Team Leader, Manager

Protects Assets...

Volunteer, Financial and Good Name

Achieves Goals...

Benefit children and increase family engagement

Management / 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

- Have a Transition Meeting
- Identify Principal's goals for the year
- Survey parents and students
- Develop the calendar, incorporating council, district, state, national events
- Make sure your PTA team is represented
- Review progress and evaluate
- Transition Meeting



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

Section 4 – Pages 57 to 68

- Secretaries Workshop
 - #104, Friday, 2:00 pm to 3:15 pm
 - #303, Saturday, 9:15 am to 10:30 am
- Minutes
- Corresponding Secretary
- Incoming Officers Form (page 64-65)
- Officers and Address Change Form (page 66)
- Ballot Template (page 67)
- Official Motion Blank (page 68)

Secretary



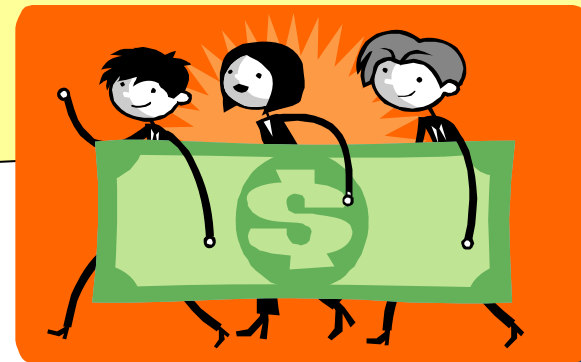
- Minutes at all meetings
- Send meeting notices
- Prepares agendas
- Submits contacts online to GPTA
- Maintains membership lists
- Emergency check signer
- Custodian of records
- Copies bylaws for board
- Establishes quorum and counts rising vote
- Attends council, district and state functions
- Financial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

Section 5 – Pages 69 to 116

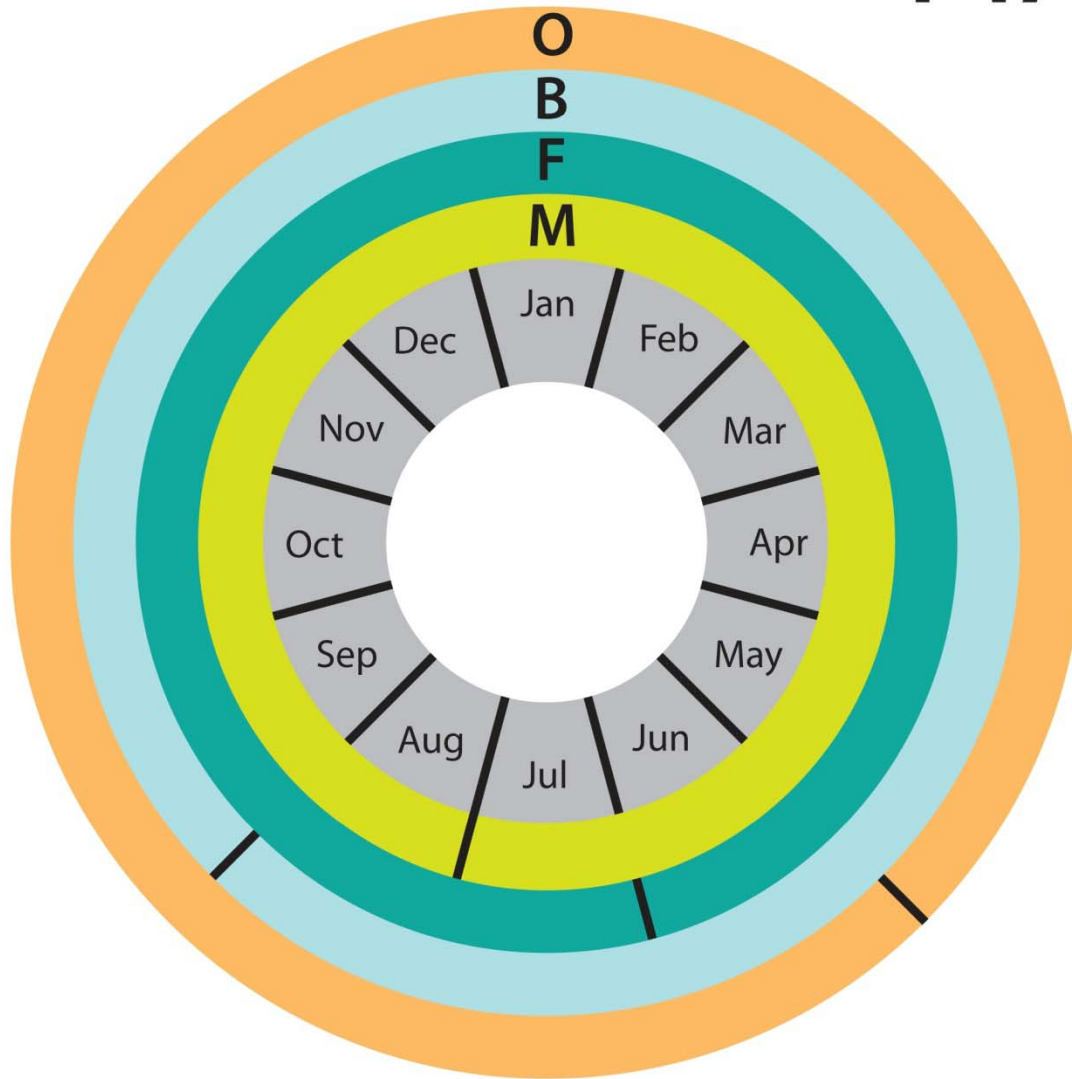
- Treasurers Workshop
 - #103, Friday, 2:00 pm to 3:15 pm (Part 1 of 2)
 - #203, Friday, 3:30 pm to 4:45 pm (Part 2 of 2)
 - #302, Saturday, 9:15 am to 10:30 am (1 of 2)
 - #402, Saturday, 2:30 pm to 3:45 pm (2 of 2)
- Treasurer's Checklist (page 71)
- Financial Time Frames
- Budget
- Tax Information
- Sources of Funds
- Spending PTA Funds
- Liability Issues
- Financial Accountability (Forms – pages 104-115)

Protect your PTA Assets

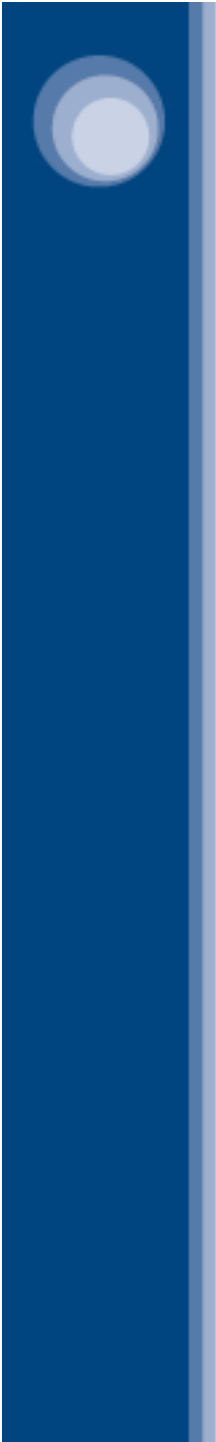
The team is in charge of running a business.



PTA Calendars



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

- 
- Budget
 - Tax Information
 - Sources of Funds
 - Spending PTA Funds
 - Liability Issues
 - Financial Accountability
 - Forms

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, membership)
- Fundraising: Follow 3:1 Rule



Section 6 – Pages 117 to 184

Committee Chairpersons

- **Arts In Education / Reflections**
- Audit
- **Bylaws**
- Character Education
- Community Outreach
- **Diversity**
- Education Enrichment
- **Health/Wellness Education**
- Hospitality
- Latino/Hispanic
- **Legislation/Advocacy**
- Male Involvement
- **Membership**
- Nominating Committee
- **Parent/Family Involvement**
- Programs
- Public Relations
- Room Representative
- Special Education
- Volunteer Coordinator
- Website Coordinator
- Youth Services
- Youth/Student Involvement
- Committee Plan of Work - FORM

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

Plan of Work

Procedure Book

**Leadership Resource Guide - pages
184, 119 - 120**



Arts In Education/Reflections

- Benefits of Arts Education
- Arts Advocacy
- Reflections
 - Theme 2011-2012
“Diversity means...”



Bylaws

- *Unit's governing rules*
- What do your bylaws say?
 - *Bylaws Amendment Guide (page 132)*
- Who can see the bylaws?
- *What can you change in your bylaws?*
 - *Bylaws Amendment Form (page 133)*



Parliamentary Procedure

(Aka, Roberts Rules of Order)

- Insures order and respect for all
- Appoint Parliamentarian –
Vote (by ballot)
- Quorum - Number of members required to be present to conduct business
- Majority Vote and Two/Thirds Vote



Diversity

- **Membership** should be reflective of the community, and **leadership** should be reflective of membership.
- **Cultural competency** – cultural awareness and the ability to build relationships across cultural groups.
- **Set goals** to address the challenges of Georgia's ever changing students, schools and communities.



Health/Wellness Education

- **Fitness Assessment:** Beginning in the 2011-2012 school year, the law requires each local school district to conduct an annual fitness assessment program for all students in grades 1-12 enrolled in Georgia public school education classes taught by certified physical education teachers.

Legislation & Advocacy

- Broken down into basic parts:
 - Anyone who speaks for another is an **advocate**.
 - PTA members advocate on a wide variety of child-related **issues**.
 - **Advocacy** is simply communicating about an issue for which PTA has adopted a position.
 - The **decision-maker** is any individual or body that has the power to address the issue or solve the problem.



Legislation & Advocacy

- Capitol Watch: regular reports and news from State School Board, House, Senate, committee hearings
- Legislative Events:
 - Advocacy Conference - Sept. 23, 2011
 - PTA Day at the Capitol - Feb. 28, 2012
 - PTSA Youth Day at the Capitol – TBA
- Develop Resolutions when needed for your school

Membership

- Membership is everyone's job all year
- Value of membership
- Select a theme or slogan
- Card = Member benefits
- Budget
- Reach out, diversify
- Reward and thank members
- Remit dues monthly
- Membership roster / Just Between Friends

Georgia PTA Theme: Join Us!

Parent/Family Engagement

- National Standards for Family-School Partnerships
- Hearst Awards
- PTA Take Your Family to School Week Awards
- Parent Involvement Certification
- The Model PTA
- Urban Family Engagement Initiative
- Teacher Curriculum
- It Takes A Parent

National Standards for Family-School Partnerships



Section 7 – Pages 185 to 194

- Local Unit Grants and Awards
- CLT Grant Application
- Endowment Fund and Individual awards
- Honorary Life Achievement Award
 - Georgia and National PTA
- Founders Award
- Keys to Leadership Success
- Scholarship Information



Section 8 – Pages 195 to 214

- PTA Reports
- Report Writing Tips
- Forms
- Awards
- Best Ideas Form



PTA Reports

- What are they and why write them?
- Categories
 - Outstanding Local Unit Report
 - The Model PTA Award
 - Best Ideas
- Deadline date – postmarked on or before the second Friday in March, to the Georgia PTA state office



Awards

- Outstanding Local Unit
- The Model PTA
- Georgia PTA Hearst Award
- Outstanding Educator
- Outstanding Principal
- Outstanding School Nurse
- Visionary
- Outstanding Advocacy (new)



Section 9 – Pages 215 to 216

- Forms (alphabetized)
 - Name
 - By page number
 - Used/due

Leadership Team List

- 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





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



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

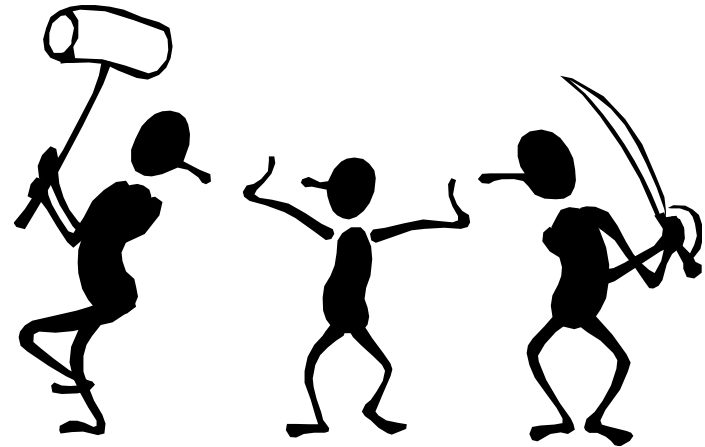
Feelings are hurt

Perceptions are negative

Resources are spent unnecessarily

Opportunities are missed

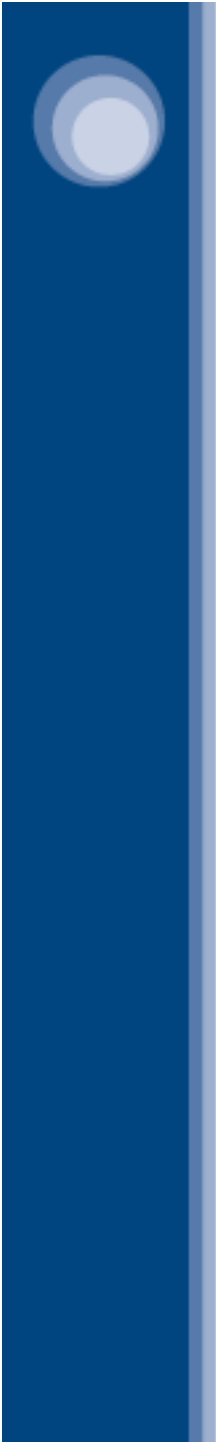
Children pay the price for childish behavior





Wrap up

- Questions / Comments
- Name a strategy, best practice, or something you learned from this workshop that will help you and your team have a successful PTA year.



*Thank you
for attending today's
President's workshop!*