These slides have been collected from a number of PTA sources. They may be of value in the training of Unit Presidents and other officers.

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Genesee Valley Region

PTA®

everychild. one voice.®

GVPTA.ORG
Leadership Academy 2012

President and VP

Tuesday, August 14, 2012
6:30-8:30PM
at
Arcadia High School
120 Island Cottage Rd
Rochester, NY 14612

This workshop is for presidents and VPs. Learn what you need to know about the positions and how to do a proper orientation of the executive board. Learn how to motivate, delegate and train board members as well as set goals for the new school year. Tips will be shared on how to work with individual talents and make a successful team!
Topics

• The Association
• President’s Role – administrator of the PTA team
• Good Start – Guides, training, bylaws, budget, calendar, committees, procedures, Goals
• Membership – sustain and grow membership
• Fiduciary Responsibility – budget, audit, IRS 990
• Advocacy – since 1897
• Resources – parent involvement, engaging educators, and helping students; NYS PTA Resource Guide, Where We Stand”,
• Your PTA – tools to provide programs and run the unit
• Leadership – learning & experience
• Succeeding – understand PTA, follow practices
• Represent PTA – accurately, fairly, with dignity
• Good Meetings – planning, parliamentary procedure
Things you should know
PTA Organization

National PTA — Eric Hargis, Executive Director
Betsy Landers, National PTA President, 2011-2013
Otha Thornton, National PTA President-Elect

NYS State PTA - (Dr. Maria Fletcher, President)

Genesee Valley Region PTA
(Marci Weber, Region Director)

Councils and Units
Executive Committee
Executive Board
Committees
Nominations
Bylaws

“Making a Difference Together”
About PTA

PTA comprises millions of families, students, teachers, administrators, and business and community leaders devoted to the educational success of children and the promotion of parent involvement in schools. PTA is a registered 501(c)(3) nonprofit organization that prides itself on being a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education. Membership in PTA is open to anyone who wants to be involved and make a difference for the education, health, and welfare of children and youth.
President

You are

– a cheerleader
– a facilitator
– a calming influence
– an agent for communication and
– someone who promotes understanding

a leader!

Leadership – the art of getting or inspiring people to do something.
Running a PTA

- Take a deep breath
- 2012-2013 PTA President’s Quick-Reference Guide
- NYS Resource Guide
- Board Legal Responsibilities
  - The **Duty of Care** – protect name and reputation of PTA
  - The **Duty of Loyalty** – act in the best interest of the association
  - The **Duty of Obedience** – to comply with all local, state, and federal laws, PTA mission and purpose, and PTA Bylaws

http://www.pta.org/reference_guides.asp
National PTA® > Running a PTA > Quick-Reference Guides
The National PTA Official Back to School Kit Online

All local, council, district, and region PTAs must register to receive their Official PTA® Kit. The incoming 2012-2013 PTA president or other authorized PTA leader must fill out the registration form to select the preferred shipping address and date for the kit. The order form will be available through September 7, and kits will start shipping weekly in June.

The National PTA Official Back to School Kit is available exclusively to PTAs in good standing.

Register for Kit Delivery

To order Back to school kits over the phone, units may call the National PTA Information Center at (800) 307-4782 during regular business hours through Friday, September 14. For more details, read the kit FAQs.

www.pta.org/3104.asp

Use your National PTA Unit ID for this kit.
ABCD’s OF PTA LEADERSHIP

• All actions are accountable
• Build boardsmanship and budgets by the book
• Communicate clearly, concisely, and credibly
• Delegate ~ Don’t do everything!
Why Presidents Succeed

- Make each member feel welcome
- Help each member understand the organization and its purpose
- Take time to read all information received
- Take time ofr adequate preparation (agenda)
- Arrange activities in which all members can participate
- Delegate the work
- Distribute materials to appropriate officer or chairman
- Always refer to the organization as “Your PTA”
- Remember they are only the CHAIR, never the BOSS
- Never forget to praise
- Remember to say, “Thank you, you did a great job”
Things You Should Know

- Membership Dues are now $4
- File a Form A - Annual Officers' Contact Information Sheet
- File IRS Form 990-N (e-Postcard)
- Read your Bylaws (and procedures)
- Understand Mission and Purposes of PTA
- National PTA Quick-Reference Guides PTA
- Use the NYS PTA Resource Guide
- PTA is not a fund raising organization
- Attend Region and State leadership activities
- Prepare for a smooth transition
PTA can help you do more for your child and school

PTA helps focus attention where it is needed most

When you don’t have time, you can know PTA is working on your behalf
The Value of Membership

PTA®
FIDUCIARY RESPONSIBILITIES

• Have 3 names on signature cards at bank
• All PTA checks MUST have 2 signatures
• Never make checks out to cash
• Never pre-sign any PTA checks
• Always use vouchers & remittance forms & a ledger
• Two people to count and verify monies
• Have bank statements mailed to Treasurer
• Ensure you do a monthly reconciliation at every board meeting – put this on your agenda!
Quick Checklist for the Use of PTA Funds

- PTA Funds education of PTA leaders and membership through attendance at conferences and workshops
- PTA Funds programs at PTA meetings to provide information on Parenting and Family Life and Parent Involvement
- PTA Funds programs for all children such as Arts-In-Education performances
- PTA Funds Reflections programs
- PTA Funds any project that carries out the Purposes of PTA

Session 3C: What’s a 501(c)3 and Why Should I Care? (Deborah Walsh, National PTA) 2012 Summer Leadership Conference
Quick Checklist for the Use of PTA Funds

- PTA Does Not Fund Principal’s discretionary funds
- PTA Does Not Fund paid after school programs
- PTA Does Not Fund equipment for schools (computers, playgrounds, etc.)
- PTA Does Not Fund areas that have been cut from the school district’s budget
- PTA Does Not Fund any project that is not in direct correlation with the Purposes of PTA
NYS PTA Position Paper
School District Requests for Financial Assistance

- Fund-raising is NOT a major effort of PTA, a not-for-profit organization, as identified by Section 501(c)(3) of the IRS code which allows PTAs their federal tax exempt status
- PTAs are not “booster clubs” for schools and school districts
- PTA’s job is not to provide financial assistance to the schools
- PTAs should support the passage of fiscally responsible school budgets
- PTAs risk insurance liability issues, becoming responsible for income taxes, workmen’s compensation, disability, and other legal concerns
Top 8 Reasons Why PTAs Should Not Give Gifts To Schools

1. Can create inequity among schools
2. Liability factor
3. Gift does not necessarily remain in the school it was intended for
4. Responsibility for maintenance and servicing of gift unless school district accepts that responsibility
5. Gift by one PTA creates pressure for similar donations by other PTAs
6. Establishes a precedent
7. Establishes PTA as a “fundraising” organization not an advocacy organization
8. It is not PTA’s job to provide financial assistance, it is PTA’s job to advocate for the needs of the children
Welcome to Genesee Valley Region PTA!

GVPTA Training and Ice Cream Social

Genesee Valley Region PTA will hold a Training and Ice Cream Social on Monday August 15, 2020. The program will begin in the cafeteria at 6:30 PM.

LEADERSHIP_ACADEMY_2011_EMAIL_INVITE.pdf

GVPTA Leadership Grant

The Genesee Valley Region PTA Leadership Grant is designed to give individuals in the Genesee Valley Region financial support so that they may attend NYS PTA Summer Experience, NYS PTA Convention, Legislative Education, or other PTA event at the discretion of the Genesee Valley Region PTA.

Application Form [pdf] [doc]
GVPTA Awards

Nominations are due by October 1, 2012.

J. Ernest DuBois Educator Award recognizes an active educator (classroom teacher, librarian, or counselor) who works directly with students, is an active PTA member who is serving or has served at least one year of the past three years on the unit’s executive board or is serving in a capacity that furthers the mission of PTA, has made a commitment to PTA…has made a commitment to all children.

Administrator Award recognizes an exceptional administrator who demonstrates a commitment to education and to the children and families in his/her school, his/her district, his/her community.

www.gvpta.org
SAVE THE DATES!

**Wednesday, November 7th** – GVPTA Presidents’ & Principals’ Dinner – Burgundy Basin Inn 5:30 - 8:30

**November 16-19** – NYS PTA Convention, Saratoga Springs

**GVPTA Round Tables** – times and places TBA

**March 2013**
- PTA Advocacy Month
- Legislation/Education Conference
- PTA Lobby Day/Virtual Lobby Day

**May 2013** – GVPTA Spring Conference

**July 2013** – Summer Leadership Conference
ATTITUDE IS EVERYTHING

- Attitude is the little thing that makes a **BIG** difference
- Attitude is contagious
- Make sure the attitude you spread is a Positive & Healthy Attitude
Hand Outs

• GVPTA bi-fold
• A Checklist for Effective Leadership
• 5 fundamentals of Good Meetings
• Why Presidents Succeed
• Time Management
• Important Dates
• Save the Dates – round tables
• Winner vs Loser
• 100 Ways to Know More Do More
• Ways to Help your Child and School Succeed
• Financials – checklist for Presidents and Treasurers
Advocacy
Advocacy

Advocacy Alerts
How to Write and Submit a PTA Resolution
Issues Briefs and Talking Points
Legislative Directory
Legislative Program
  Basic Policy
  Where We Stand - includes current Resolutions and Position Papers
  Legislative Directives
  Position Papers
PTA Lobby Day/Virtual Lobby Day 2011
Regents Reports
Resolutions
  2010 Adopted Convention Resolutions
  2009 Adopted Convention Resolutions
  How to Write and Submit a PTA Resolution
  Historical List of Retired Resolutions
Take Action with NYS PTA CapWiz
Testimony

http://www.nyspta.org/advocacy/advocacy.cfm

Together we work for a common purpose: to secure adequate laws, regulations and policies for the care and protection of children and youth.
ADVOCACY

• Become familiar with our “Basic Policy” and “Where We Stand”
• Keep in mind the Mission of the PTA is primarily advocacy with issues affecting children and youth
• Share our advocacy mission
• “Legacy of Legislation”

TAKE ACTION WITH CAPWIZ
Where We Stand is the official position document of the New York State PTA. It is comprised of resolution statements adopted by convention delegates. These statements are intended to guide members as to what action to take on specific issues that affect the education, health and welfare of children and youth.

http://www.nyspta.org/pdfs/advocacy/WHERE%20WE%20STAND%202011.FINAL.pdf
• **Bylaws**
  organizational framework
• **IRS 501(c)(3)**
  tax exempt, non-profit org
• **Insurance**
  protects officers and organization
  both liability insurance and fidelity bond
• **Networks**
PTA – Mission & Vision

Mission Statement
PTA is
A powerful voice for all children,
A relevant resource for families and communities, and
A strong advocate for the education & well-being of every child.

Vision Statement
Making every child’s potential a reality by establishing the New York State Congress of Parents and Teachers, Inc. (NYS PTA) as the premier organization for parent involvement and advocacy for all children.
PTA - Purpose

Purposes
• 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.
Programs
Programs and Services

National PTA and NYS PTA have developed many programs over the years to enable parents and teachers to provide better leadership to their school communities.

Building Successful Partnerships
Parents As Reading Partners
Reflections

“Diversity Means…”
Research Shows

Parents are more likely to become involved when:

• Parents understand they **SHOULD** be involved

• Parents feel **CAPABLE** of making a contribution

• Parents feel **INVITED** by the school and their children

(Hoover-Dempsey and Sandler, 1997)
History
PTA a Century of Commitment

• National PTA has a long history—more than 114 years in fact—of providing resources and important information to parents and teachers.
• PTA has been there, reminding our nation of its obligations to its children.
• PTA has been instrumental in the passage of important laws and guidelines that we sometimes take for granted, such as:
PTA a Century of Commitment

– Creating a separate criminal justice system for juvenile offenders
– Enforcing child labor laws
– Building Kindergarten into the public school system
– Supplying federally funded hot-lunches to more than 26 million children a day!
– Supporting mandatory immunizations for school children
– Supporting school bus safety regulations
– Creating the content-rating system for television
PTA Mission

PTA is:

- A powerful voice for all children,
- A relevant resource for families and communities, and
- A strong advocate for the education and well-being of every child
PTA helps connect you with:

- Your child’s school
- Other parents
- Teachers, administrators, and school board
- Important issues affecting your child and school community
A 100 years from now,  
It will not matter what my bank account was,  
The sort of house I lived in,  
Or the kind of car I drove ...  
But the world may be a different,  
Because I was important in the life of a child.

–Forest E. Witcraft  
October 1950 issue of Scouting magazine
National PTA Resources

www.pta.org

• 1,000+ web pages
• Covers today’s parenting, education, health, and safety issues

Our Children magazine

• Published 6 times a year
• Subscription discounts up to 50%
• FREE in Members’ website