President I

Dorothy Gardner - MOPTA
Monica Crowe - KSPTA

Mission of PTA

The overall purpose of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PURPOSE

- To promote the welfare of children and youth in home, school, community, place of worship, and throughout the community.
- To raise the standards of home life.
- To advocate for laws that further the education, physical and mental health, welfare and safety of children and youth.
- To promote the collaboration and engagement of families and educators in the education of children and youth.
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

PTA Structure

- Local Units
- Councils
- Regions
- Missouri PTA
- National PTA

Your Leadership Team

Executive Committee

- Elected Officers

Executive Board

- Elected Officers
- Principal or his/her designee
- Teacher Representative
- Student Representative
- Standing Committee Chairs
- Parliamentarian

- *Your Executive Board (not your EC) is the legal entity of your association and acts on behalf of your membership.*

Basic PTA Information

- Employer Identification Number (EIN)
- Local Unit Number
- Are you “In Good Standing”?

Good Standing

Missouri

- Adheres to the Purposes & basic policies of the PTA
- Remits membership dues monthly
- Has bylaws approved every three (3) years
- Submits a copy of the fiscal year-end report by December 1st
- Submits a copy of the annual financial review by December 1st
- Submits a copy of the required IRS tax by December 1st
- Submits the incoming officers of by March 31st

Kansas

- Adheres to the Purposes & basic policies of the PTA
- Remits membership dues monthly
- Submits a copy of the annual financial review by September 15th
- Submits a copy of the required IRS tax by November 15th
- Submits the officers when elected or no later than September 1st

What does it mean to be a nonprofit 501(c)(3)?

You can earn a profit but the money needs to be spent on your mission & goals and not paid to stakeholders.

Fundraising should not be your primary focus! Follow the 3-to-1 rule.

Protect Your Tax Exempt Status!!

Must do now!

- Submit your officers
- Meet with your Principal
- Get familiar with your PTA's documents
    - Bylaws
    - Budget/Financials/ Audit

Meeting with your principal:

- Map out the calendar for the year
- Talk about the goals of the school
- Discuss what PTA programs can be implemented to support the school's goals

Be Aware of Unit Finances All the time

The President & Treasurer

You will be spending a lot of time with your treasurer!

- Signing Checks *(best practice have 2 signers on every check)*
- Reviewing bank statements
- Preparing the budget
- No Debit cards
- No gift cards

Things to do over the Summer

- Prepare for Open House
- Prepare calendars
- Develop Membership campaign
- Recruit Committee Chairs/Volunteers
- Order Spirit wear
- Develop the budget
- Develop online tools

PTA President = Team Leader and Manager

Protect Assets…

Volunteer, Financial and Good Name

Achieves Goals…

Benefit children and increase family engagement

- ***Presidents – set goals for the year for your Board, make sure everyone is trained for their job and make sure expectations are clear.***

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

Your Leadership Style

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

Running a Meeting

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

Agenda

- Call to order
- Inspirational Thought
- Minutes
- Report of the Treasurer
- Reading of Correspondence
- Report of the Executive Committee
- Report of Committees
- Unfinished Business
- New Business
- Program
- Announcements
- Adjournment

- May be a member of your PTA/PTSA team. They sit on your board. Check your bylaws.
- Wants/needs to connect her/his goals – ***based on the School Improvement Plan*** – to your PTA work to benefit all students, all families, the entire local school community.
- Does not run or manage PTA funds.
- You are a guest in their school. Always respect that.

The PTA & Principal Relationship

BASIC FINANCIAL MANAGEMENT

No cash payments

Accurate documentation

Prior approval for all expenditures

Only President signs contracts

Prompt bank reconciliations, 2 sign-offs

Purchase insurance

Maintain incorporation

Remit dues monthly

Membership approved budget

Appropriate uses of PTA funds

Explain procedures to others

Follow procedures yourself

2 signatures on all checks,
3 signers on file at bank

Don’t <u>ever</u> sign a blank check

Promote the PTA!

- Use the logo on everything.
- Make sure your committee chairs and VPs have access to the logo.
- Evaluate your communications plan.

- **ALWAYS send thank you notes after an event to the Chairperson and key volunteers.**
- **Give credit to your PTA for hosting something. Make a sign that says**
- **"Courtesy of PTA (use logo)" that goes out front of the event.**
- **Set the example. Be the personal greeter at the door saying hello to families as they walk in to your meetings or events.**
- **Make a point to make EVERYONE feel welcome!**

Use Your Resources

- Missouri PTA and Kansas PTA
- Tool Kits
- Your local unit bylaws
- Your council officers
- www.mopta.org
- www.Kansas-PTA.org

- National PTA
- E-learning Opportunities
- Back to School Kit
- www.pta.org

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