President II

Tips and tricks throughout the year

Congratulations You're President

- Get some training!
  - Convention
  - E-learnings courses
    - Board Basics
    - Local unit president
    - Local unit secretary
    - Local unit treasurers
    - Parliamentary Procedure
    - Preventing Theft in your PTA
    - Quick guide to budget basics
    - Quick guide to 501(c)(3) Basics

New or returning presidents

- Who makes up the Executive Board
- When and how often meetings take place
- Specifics for money handling procedures
- Quorum for both Executive board and General Meeting
- Length of terms
- How to handle resignations or removals
- Nominating committee
- Giving notice requirements

Know Your Bylaws

- Presides over meetings
- Represents the PTA
- Ex-Officio on all committees EXCEPT nominating committee

Co-officers are not recognized under Missouri Law and it is not recognized under Roberts Rules of Order.

Know your Role

Calendar – start planning early

Before the end of the school year

- Meet with outgoing president
- Meet with incoming executive committee
- Develop basic goals for the year
- Use Awards as a guide
- Meet with principal

Be mindful of community norms or social events that may

have an effect on your calendar.

Plan with sustainability in mind!

Communications – Executive Board

Decide how you will communicate

- Consider using email that can be easily passed along
- Email cc'ing and reply all procedures
- Online tools for sharing information
- How committees will interact – consider electronic means
- Utilize procedure books

Communication - Membership

- Use a designated email
- Have a web presences
- Consider your social media presence
  - Develop clearly defined procedure for posting/authorized users
- Newsletters
- Texting

Electronic Meetings

Yes you can and no you can't have electronic meeting

The minimum requirement to conduct business via an electronic meeting is that all members can hear and be heard.

- Executive board meetings can meet this standard
- General meetings do not

May/June

- ❑ Meet with outgoing president
- ❑ Meet with incoming executive committee
- ❑ Make sure officers are sent to State PTA
- ❑ Make sure an annual review committee is in place
- ❑ Recruit committee volunteers
- ❑ E-learning – Presidents & Parliamentary
- ❑ See if eligible for awards (check state's dates)
- ❑ Make sure to follow MOPTA and NPTA social media

June/July

- ❑ Meet with Principal
- ❑ Hold a summer meeting with Executive board
  - ❑ Finalize calendar
  - ❑ Go over budget if it was not previously adopted
  - ❑ Review meeting process (agenda/voting/motions)
  - ❑ Make sure Financial end of year report is finished (out going treasurer)
  - ❑ Make annual review committee is underway (after end of FY)
  - ❑ After annual review complete file 990 (best if outgoing treasurer)
  - ❑ Make a membership campaign plan
  - ❑ Form a bylaws committee if needed

August

- ❑ Host a Back to School event
- ❑ Kick off membership campaign
- ❑ Hold General Meeting
  - ❑ Report of the annual review committee
  - ❑ Report End of Year Financial report
  - ❑ Report on filing of 990
  - ❑ Present budget and vote (if not previously done)
  - ❑ Explain the importance of membership
  - ❑ Explain how the PTA will communicate with members
  - ❑ Committee chairs introduce committee
  - ❑ Outline goals
  - ❑ Amend bylaws if needed

September

- ❑ Hold general membership meeting if did not do so in August
- ❑ Send in membership dues (these are due monthly)
- ❑ Apply for awards – check dates
- ❑ Send in End of Year Financial report (MO), Annual Review form and copy of 990 submission
- ❑ Part of a council – attend or designate individual to represent
- ❑ E-learning – Treasurer & Secretary
- ❑ Kick off Reflections
- ❑ Hold Executive Board meeting

October

- ❑ Send in dues
- ❑ Look over awards – see if on track
- ❑ Plan for next general meeting
  - ❑ consider hosting a program or event
  - ❑ recognize Reflection winners
- ❑ Ongoing communication with Executive Board
- ❑ Share State publications
- ❑ Share PTA social media posts

November

- ❑ Send in dues
- ❑ Send in End of year financial report, annual review report, copy of 990 IRS submission (due 12/1 MO 11/15 KS)
- ❑ Hold a General meeting
  - ❑ Plan an event or program
  - ❑ Give a treasurer's report
  - ❑ Recognize Reflection winners
  - ❑ Address any bylaws changes and send amendments to the state
  - ❑ Elect the nominating committee (check bylaws)

December

- ❑ Send in dues
- ❑ Hold a general meeting if you did not hold one in November
- ❑ Take the E-learning Legislative workshop
- ❑ Plan membership drive for new and existing parents
- ❑ Share Contact
- ❑ End of Year Financial report, 990 submission copy and annual review form due to state office 12/1 (MO if KS should have already done this last month)
- ❑ Upload Reflections entries
- ❑ Share legislative information

January

- ❑ Promote membership drive
- ❑ Legislative alert sign up drive
- ❑ Voter registration drive for April election
- ❑ Pass along legislative alerts
- ❑ Committees reports for finished work
- ❑ General membership meeting (if didn't hold one in Nov/Dec)
- ❑ Review awards applications – adjust if needed

February

- ❑ Send in dues
- ❑ Send in convention registrations
- ❑ Check on nominating committee
- ❑ Hold a Founder's Day event
- ❑ Send out Legislative alerts alerts
- ❑ Send out State publications
- ❑ Prepare for March meeting
- ❑ Review guidelines for holding elections

March

- ❑ Send in dues
- ❑ Hold a general meeting – plan an event to bring them in
  - ❑ ELECTIONS – send in officers by 3/31 (MO) 9/15 (KS)
  - ❑ Address any bylaws changes you might need (MO)
- ❑ Send in Convention registrations
- ❑ School board and bond issues
- ❑ Form a budget committee

April/May

- ❑ Send in any dues
- ❑ Attend state convention
- ❑ Have committee's turn in final reports and procedure books
- ❑ Executive board review committee reports and select financial review committee
- ❑ Hold a general meeting – plan an event
  - ❑ Pass budget for next year
  - ❑ Report on convention
  - ❑ Officer induction
  - ❑ Report on accomplishments from the year
- ❑ Send out a survey

Last term?

- ❑ Meet with incoming president
- ❑ Pass along records, procedures books, passwords, emails, online presence.

Give yourself a HUGE pat on the back!!!

Dorothy Gardner - Missouri PTA President

Monica Crowe – Kansas PTA President

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