



# Conducting A Board Orientation

## **SAMPLE - XYZ PTA Orientation Meeting SCRIPT**

7:00 – 7:30 Dinner

7:35-7:40 Welcome to all the new XYZ Lane PTA Executive Board members and welcome back to all board members who are returning. Let's take a moment to go around the room and introduce ourselves and the committee we are representing or the job we are performing.

I'm going to ask you to make a choice for each of the three questions I am about to ask and remember your answers. Do you prefer pizza or cheeseburgers? Do you prefer the mountains or the beach? Do you prefer the beach or the mountains? And, finally do you prefer roses or daisies? Now will those who preferred pizza go to the side of the room near the windows and those who prefer cheeseburgers stand near the stage. Now, those who prefer the beach stand near the windows and those who prefer the mountains stand near the stage. Now will those who prefer roses stand near the window and those who prefer daisies stand near the stage. If you notice you moved into different groups sometimes with different people and sometimes with the same people. You had a common denominator when you were in a particular group. What I'd like us all to keep in mind that when we are working together in PTA our common denominator is always the children and what is in the best interest of the children. Now what I'd like to ask is for everyone to fold their hands. Notice where your thumbs clasp naturally. Now change the order in which your thumbs are folded. At first this feels quite unnatural, but after some time passes you become used to the feeling. This little experiment is to demonstrate that we may sometimes be used to things being done a certain way – we feel comfortable with the familiar, but that doesn't mean we can't adjust to change. In order for us to function effectively, we must truly work as a team. It takes great effort to move a large group in a particular direction, but if we work as a team we will be successful. So that is the theme of this evening "Learn the Way to Lead

the Way". We all have a unique talent that we bring to our PTA table and if we join all of our talents together, we will have a powerful team.

#### 7:40 Power Point Presentation

- Vice President – Board Member Responsibilities
- Secretary - PTA Protocol
- Treasurer – Fiduciary Responsibilities
- Secretary – E-mail guidelines
- Vice President – Committees
- Vice President – Reporting at Board Meetings

## SAMPLE BOARD MEMBERS RESPONSIBILITIES

Board members shall:

- Be a member of PTA unit and show the card to the Secretary by the November meeting.
- Meet with predecessor to receive all materials. For all our new members see your Coordinator for help in getting your files. Be familiar with materials received. This way you can ask questions and be better able to understand your committee.
- You are expected to attend as many meetings of the Board as possible. Without a quorum, we cannot conduct business. Call your Coordinator/Secretary when unable to attend a meeting. You must be responsible for calling your Coordinator to get assignments and any pertinent information from a missed meeting. Notify Coordinator/President if unable to perform duties. Sometimes unexpected problems or obligations come up and we are here to help you.
- Present concise reports at Board meetings. Familiarize your Coordinator with reports prior to meetings and submit a copy of any reports to your Coordinator, the President and the Secretary. Monthly reports are due the last day of each month – you have been supplied with enough forms for the year in the section of your binder tabbed “Monthly Reports”.
- Request from Coordinator permission to attend workshops/conferences at UNIT expense. Submit a report after attending a workshop or conference as a UNIT representative. We share our convention experience and workshop information after convention. And we all enjoy hearing how much information we came home with.
- Submit articles for the Newsletter by the deadline date with copies to President/Coordinator. A copy of the Newsletter deadline schedule has been included in your binders. When you have had a chance to look through your binder, take a highlighter and highlight the issues that you must submit an article for.
- Use stationary for official correspondence. There is a sheet of stationary included in your binder. If you are interested in receiving a file for your

computer, please let the secretary know and she will e-mail it to you. Do not mail any correspondence out until it has the OK of your Coordinator and President.

Include the following heading on all flyers:

New York State Congress of Parents and Teachers, Inc.

every child.one voice.

NAME OF PTA®

- Have all flyers and releases approved before printing. Your coordinator and the President must see all flyers first.
- Answer any inquiries on procedures and/or problems if you can. If you cannot, call your Coordinator. There is nothing wrong with saying I will call you back, I want to check my information.
- Contact your region counterpart when necessary. Region has wonderful chairman, so call them.
- Notify the Coordinator/President of all committee meetings, names of those in attendance, date and location of meeting.
- Submit Nominating Committee form with Recommendations.

## **SAMPLE PTA PROTOCOL SLIDE SCRIPT**

### **DEFINITIONS OF PROTOCOL:**

They are rules for any procedure and principles that govern. They are the code of manners and courtesies that are accepted as polite and proper in official dealings, as between heads of state or diplomats.

In PTA we all share protocols specific to our position, as well as general principles of courtesies.

### **CALLING YOUR COORDINATOR**

- When creating plans of work; changes to the plans; reporting progress with your plans of work; when problems arise ASAP; when you have any questions at all.
- For prior-approval of correspondence you want to mail or distribute; flyers; and newsletter articles.
- To share any ideas or newsworthy items that your Coordinator can then present to the Executive Committee for approval.

Keeping the lines of communication open will help to ensure a cohesive operation of meetings, conferences, and programs.

### **RETURNING PHONE CALLS AND E-MAILS**

It is important to return telephone calls and answer e-mails in a timely fashion. If you do not know the answer to a question - DO NOT GUESS. Tell the person you will research the answer and get back to them. Please remember to get back to the person as soon as possible. If you are waiting for a response from someone, be understanding as they may not have received your message (either by phone or e-mail), or there may be some pressing family issue they must attend to.

## **REGRETS**

You will need to contact your Coordinator when you cannot attend the monthly meetings, or a function, for which you have been assigned. This is known as sending Regrets. In turn, your Coordinator is required to contact the Presidents with any Regrets from their group of chairmen, or for themselves as well. In addition, the Coordinator are also required to contact the President with any issues, problems, concerns, that they have encountered.

## **TIME LIMITATIONS**

All programs and functions have set schedules for preparation and delivery. If you are submitting a newsletter article, or need handouts printed, or flyers to be distributed - giving it to your Coordinator the day before the deadline, is not appropriate - people may not be available at the last minute. Therefore, you will need to plan a time schedule allowing for the approval process, and the date by which the items need to be submitted for printing.

## **KEEP YOUR SENSE OF HUMOR**

***MOST IMPORTANT - ENJOY WHAT YOU ARE DOING***

***KEEP IT LIGHT - KEEP IT SMART - KEEP A SMILE HANDY AT ALL TIMES!***

## **SAMPLE FIDUCIARY RESPONSIBILITIES SLIDE SCRIPT**

- Expense Vouchers must be submitted to receive reimbursements. Copies are provided in your binder. Your coordinator needs to sign their approval
- Receipts must be attached to vouchers in order to receive reimbursement – use the tax exempt form for PTA purchases
- When receiving cash at your event, two individuals should count and a remittance form prepared and submitted to the treasurer along with any cash and/or checks received. These items should be given to the treasurer as soon as possible following the event.
- Reimbursements you should not be taken from cash received. An expense voucher should be submitted along with receipts to the treasurer.
- Requests for startup cash should be submitted in advance to the treasurer so funds will be available for the committee.
- Requests for a tax-exempt form should be made in advance to the treasurer with information regarding the purchase. Tax exempt certificates are to be used for PTA purchases only.
- Notify the treasurer/budget committee of projected funds needed while the budget is being prepared.



## **SAMPLE EMAIL GUIDELINES SLIDE SCRIPT**

### **Standards of Behavior:**

- Remember that e-mail messages can be printed and forwarded, so be careful what you say. Assume that your message might be read by people other than those you addressed the message to.
- Using all uppercase letters is considered shouting and should be avoided.
- Make use of the subject line to identify the purpose of your message. In our case always include "PTA".

### **Important Reminder:**

- Be considerate. Honor requests from people who ask not to receive commonly forwarded jokes, prayers, inspirational messages, etc.
- The telephone or a face-to-face meeting, rather than e-mail, should be used to convey emotionally charged topics.

### **Format quirks:**

- Format incompatibilities can be a problem. Be careful of the use of tables, bullets, tabs, numbered lists, etc.

### **Spelling and grammar:**

- If sending a message to wide audiences consider passing it by another person before mailing to the final distribution list and remember that spelling and grammar are important even in e-mail messages.

### **Sending E-mail:**

- Messages should be as brief and to the point as possible.
- When sending e-mail always cc: your coordinator and the region director.
- Use white space to give your message eye appeal. Avoid running your entire message into one long paragraph.
- Expressing strongly held opinions without holding back emotion (often in a confrontational manner) is known as "flaming". Remember that e-mail messages are normally short and the tone of an e-mail message can be easily misunderstood since e-mail provides no visual or voice inflections cues.

## Replying:

- Send a reply whenever someone sends an attachment or a request for action.
- Use the reply all function sparingly. This function is useful when giving feedback to all members of a particular committee. Otherwise, address messages only to those who truly need to see them.
- Blind carbon (or courtesy) copies should be used when sending a message to a list of people to avoid inadvertent sharing of e-mail addresses.
- Sending a message as a carbon copy (CC😊) infers that no action is expected of the cc'd recipients(s).

## **SAMPLE COMMITTEE SLIDE SCRIPT**

Committees are a common practice of PTA.

### **Committees**

PTAs are encouraged to form committees. Their primary objectives are to promote awareness and seek solutions to the unique challenges confronting children and families. To facilitate the work of committees, chairmen are appointed. Most of the work of PTA is accomplished in standing committees or special committees. Laying the ground work is the chairman's job.

### **All Chairmen Should:**

- Meet with the committee as often as needed.
- Within the committee, design a plan of action and present it to your coordinator for approval.
- Encourage participation of all committee members.
- Report to the board.
- Pursue the committee plan after it is approved by the executive board.

### **Responsibilities of the Chairman**

- Start the meeting on time and end the meeting in a timely fashion.
- Allow enough time for the group to become acquainted. (First Meeting).
- Give everyone a chance to participate.
- Keep on the topic.
- Do not become the expert but take part in the discussion.
- Summarize after every decision.
- Report to the executive committee.
- Approve reports of the committee and submit them to the executive board for approval.
- Have vision.

- Never say anything that can hurt a committee member or be negative.
- Be sincere and thoughtful at meeting.
- Summarize the meeting and ask members to take on assignments.

### **Committee Members**

- Are receptive and open to ideas.
- Have perspective.
- Is familiar with and supportive of PTA.
- Enjoy working in a committee.
- Can give the committee time and attend the meetings.
- Have good judgment.
- Can think in terms of the board's welfare.
  - The President belongs to all the committees (ex officio member) except for Nominating and Audit.
  - The President has the same rights as any other member.
  - The President is not obligated to attend the meetings and is not counted in the quorum.

### **Responsibilities of Committee Members**

- Be prepared for the meeting.
- Participate
- Keep prejudices in check.
- Share experiences related to the subject.
- Avoid arguments
- Follow the discussion and ask for clarification.
- Do not make speeches.
- Accept and follow thru with assignments.

### **Committee Meeting**

- Send a reminder notice, e-mail or call to give proper notification of the meeting.
- Select a good day and time for everyone. Try to meet the same time and place for all meetings.

- Prepare an agenda.
- Start and end the meeting on time. Keep the meeting moving. Summarize when necessary.
- Give assignments to Committee Members. Call on committee members for their report; let them know in advance what is needed from them.
- Keep a record and reports of what goes on at the meeting. Every member gets a copy of the report. Have a member take minutes at every meeting.
- Last on the agenda set the next meetings time, date, place.

### **Making a Report to the Board.**

- The chairman gives the report to the board unless she/he is not available
- The reports are in writing.
- Begin with a simple statement.
- List findings. Stick to the basics when reporting. Give the when, where, who, and price when reporting on an upcoming event. The proposal should include time, money and man power needed to get the job completed.
- If the report is not accepted it is referred back to committee. For further study.
- If the report calls for action, make a motion. Person presenting report (usually the chairman) makes the motion. A committee report needs no second.
- The report should be signed by all committee members.
- Evaluation should be included at the end of a year and include recommendations and suggestions.

### **REMEMBER**

Report of committee is the official statement and submitted in the name of the reporting body.

## **SAMPLE - REPORTING AT BOARD MEETINGS SCRIPT**

- Be prepared. Review your notes since you last reported. Check minutes of the last board meeting to avoid repetition.
- Do not give a report off the top of your head. People tend to ramble and not stay on the topic.
- Stand and face the group when reporting so that you can be heard.
- Address remarks to the President. Do not cross talk with other board members unless the President asks you to answer a question or to comment.
- Don't mention names of people. Keep confidentiality.
- Plan ahead. Follow deadlines. Make necessary motions far enough in advance of an event, especially if a flyer must be prepared for a mailing or an article written for the newsletter or the media.
- Mark your calendar with deadlines and reminders that a report or a motion is needed.

Example: The Spring Fundraiser is scheduled for April. The chairman must send invitations to guests in February, if not earlier. Therefore, the chairman must be prepared to make motions to set fees no later than November.

- Stick to the basics when reporting. Give the when, where, who, and price when reporting on an upcoming event.
- If the board needs to approve a price or attendance at a conference, be prepared to make a motion.

“I move that XYZ PTA pay the \$25 registration fee for two people to attend the parliamentary seminar.”

- A motion needs to be seconded unless it is a committee recommendation. Once it has been seconded the maker of the motion can speak first.
- Give the major points when reporting about a workshop or conference you attended. Bring the program and packet to share with those who are interested. Board members can always ask for more information when you have finished your report.

***BE PREPARED.***

***BE BRIEF.***

***HAVE MOTIONS READY.***

## **Connection to Council, Region, State and National PTA**

The National PTA is the first link in a chain to local units (we are a local unit). The second link is the New York State PTA. The third link, the Region PTA, carries out the work of New York State PTA and National PTA. The fourth link, the Council PTA, is the closest help to local PTAs. Finally, there are more than 1,500 local unit PTAs addressing the needs of children and youth within New York State. We are self-governing; plan our own programs and activities to meet the needs of children and youth in the community we serve. However, the bylaws of our unit must conform to the policies of the National PTA and the New York State PTA.

The Council is a group of three or more PTA units within a school district. In our school district, we are a group of XX units – XX elementary, X Jr/Sr and X SEPTA. Council's role is fundamentally to inform, instruct and inspire the leaders of the units and to be responsive to their needs. Every Council creates standing committees and special committees necessary to carry out its work. Officers and committee chairmen should establish regular contact with their local unit counterparts.

## It Only Takes One

One song can spark a moment,  
One flower can wake the dream.  
One tree can start a forest,  
One bird can herald spring.

One smile begins a friendship,  
One handclasp lifts a soul.  
One start can guide a ship at sea,  
One word can frame the goal.

One vote can change a nation,  
One sunbeam lights a room.  
One candle wipes out darkness,  
One laugh will conquer gloom.

One step must start each journey,  
One word must start each prayer.  
One hope will raise our spirits,  
One touch can show you care.  
One voice can speak with wisdom.  
One heart can know that's true.  
One life can make the difference,  
-you see it's all up to you!

Thank you for your participation. We look forward to a great year working together for the children for Birch Lane and for speaking for every child with one voice. We will now meet with our Coordinators.