

BOARD ORIENTATION
Preparing Your Team
For a Great PTA Year!

Goals of our Orientation



Provide opportunity for all board members to focus on their goals and talents towards the implementation of “Leading the Way”.



Allow opportunity for board members to know each other



Welcome new board members and give an overview of our association

FINDING THE WAY THROUGH SOME FUN PLAY

ACTIVITY
TIME



PTA Values



COLLABORATION

We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.



COMMITMENT

We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.



DIVERSITY

We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.



RESPECT


We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.



ACCOUNTABILITY

All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

Board Member Responsibilities



Know and adhere to PTA philosophy, principles, and policies.

Meet deadlines by submitting reports and materials on time and fulfilling assignments promptly.

Participate constructively at meetings by being on time, coming prepared and staying on the topic and by helping others to participate fully.

Keep records and notes in a notebook or binder to pass on to the next chairman.

A Few 'Minutes' With the Secretary



Reporting at meetings – copies of report



Pick up your name card at each meeting



Email address – be sure to share if it is not on the roster –
REVIEW email guidelines



Roster – verification of contact information



Signing in your attendance



Calling with regrets

Treasurer's Info – Fiduciary Responsibilities



Budget – advice of committee needs while budget is prepared



Advance notification for request of tax-exempt certificate



Advance notification for a request of start up cash



Count cash at events and submit a remittance forms – reimbursements should never be taken from funds received at an event



Receipts and what to do with them



Expense vouchers and remittance forms – where you can find them

Email Guidelines



Replying



Sending your email



Spelling and grammar



Formatting issues



Important reminder



Standards of behavior

A Word From Your Vice President



Continue on your PTA journey – what is your next role



Transitioning to your predecessor



Reports



Motions at meetings – basic Parliamentary procedure



Plan of Work



Committees – Standing vs. Special

The PTA Connection



Grassroots Members



Unit PTA



Council PTA



Region PTA



NYS PTA



National PTA

A Word from the President



Questions



Resources



Training



Contracts



Personal issues



Meetings begin promptly



Have a Great PTA Year!

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