



# Transitions & Transformations

## Effective Transitions for your PTA

NYS PTA Webinar Series 2019

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# Workshop Goals

To learn how to achieve successful transitions & Transformation of PTA leadership by:

1. Developing engaged, diverse leadership through succession planning
2. Supporting and challenging new leaders
3. Using the nominations/elections process to strengthen PTA leadership
4. Executing a well-thought-out and timely transition plan
5. Using interpersonal and communications to build a strong team
6. Recognizing out-going and guiding incoming PTA leaders
7. Making the most of PTA resources

# Transitions

Recognizing the difference between an event and a transition

- Buying new furniture is an event
- Moving to a new home is a transition

Events produce specific outcomes (Truck delivers new furniture)

Transitions are slower and may defy the definition of their completion (kids make new friends)



## **How to Transform your PTA/Council? Eradicate the Barriers to Volunteering**

Being open to tackling the barriers that prevent diverse volunteers is the first step  
Reflection, honest dialogue, and openness to create change will change your unit for the better.

### **So, What are the barriers?:**

- What does your board look like?
- What's the vibe during your PTA meetings?
- How do you communicate to parents?
- What type of outreach do you maintain with your community?
- Are you aware of any implicit biases?

### **How do you address the barriers to building a more diverse volunteer base?:**

- Target your outreach (what are the issues for this base of volunteers?)
- Develop long-term relationships ("its not a one and done")
- Utilize community groups (churches, civic associations, community centers, fraternities and sororities)

## Succession Planning

Succession planning is a process for identifying and developing new leaders who can replace outgoing leaders.

Why is succession planning important?

1. It ensures a continuity of volunteer leadership in your unit/council and safeguard the PTA mission
2. It prepares for vacancies before they occur
3. It builds human capital along with financial capital
4. It creates a pipeline of future leaders
5. It helps to create a great reputation of PTA being ***the*** place to volunteer

# What does succession planning take?

- The Nominating Committee
- This committee should be focused on identifying and recruiting new officers all year long (this is the most important committee in PTA).
- The primary purpose of this committee is to ensure that the composition of the board is systematically refreshed to ensure the board contains officers with:
  - skills and experience relevant to leading a PTA, with the ability to manage projects, lead and train others, has the ability to be a fair but decisive decision maker.
  - the knowledge and ability to work with members to deliver the high standard of governance performance expected by unit/council members.
  - Knows their community well and engages within the community
  - Leads by example, recognizes the work of others, and leads with the mission of PTA in their minds
- In their search for new leaders, the nominating committee must keep in mind the skills, competencies, and qualities that are needed on the board.

## Nominations & the Procedures

**Nominating Committee :The Most important committee in PTA**

- Defined in the Bylaws
- Given all the materials necessary
- Elected, not appointed
- President is not a member of the Nominating Committee
- Names a nominee for each open position
- Makes its report to the members as defined in the bylaws
- Elects its chair
- Reviews the job descriptions and bylaws
- Creates a list of qualified members, review recommendations and develops interview questions
- Reviews the application process
- Creates a plan of work and timeline

### Nominating Procedures

- Procedures is a document that describes all PTA positions including elected officers, appointed board members, and their duties
- Make sure all nominees are fully aware and familiar with the procedures.
- All nominating committee deliberations are confidential
- NC nominations do not need advance approval by Executive Committee or Board

# Elections

- Make sure notice is given within 30 days of the election to all members of who is being nominated
- Have NC chair present signed committee report
- Present proposed slate of officers and ask for nominations from the floor (required for fairness and transparency)
- Vote by ballot if needed for a true vote. A secret ballot/written vote will be a true measure
- Only one nominee per office from the nominating committee (if there are no nominations from the floor).



## Continued Succession Planning: The Leadership Transition Document

### • Unit/Council Leadership Transition Document

- Being an effective leader and productive team member is also essential for all board members.
  - Here are the things I did do during all or most of my term in office year that my successor should know and practice.
  - Here are the things I wish I did do all year—had I known then what I know now—that my successor should know and practice.
  - Here are the things I suggest that my successor address during the first 30 days of their term of office.
  - Here are the things that I think would instill an effective unit/council board and help to conduct productive board meetings.
  - This is my final thought(s) to the new board leadership team—that may or may not have been covered above—for the good of the order.

## Supporting & Challenging New Leaders

### Supporting New Leaders

1. PTA's Mission
2. PTA's Strategic Goals
3. Board Dynamics
4. Financial Policies
5. Committees
6. Communication Practices
7. "Conflicts of Interests"

### Challenging New Leaders

1. "Team Building"
2. Stepping outside of your comfort zone
3. "Train the Trainer"
4. Beyond the School House
5. Deepen your Advocacy
6. Reflection & Connections

# Transitions

*A critical time in moving from one year to another, from one board to another*

**The Outgoing board should always:**

- 1. Complete and end-of-the year checklist*
- 2. Meet to debrief & evaluate the work for the year/offer suggestions for improvements*
- 3. Fully complete your term (and tasks)*
- 4. Meet your successors*
- 5. Turn over all resources and materials in a timely manner*
- 6. Host a get together honoring the outgoing board & celebrating the upcoming journey of the new board (it's a celebration, a passing of the torch)*

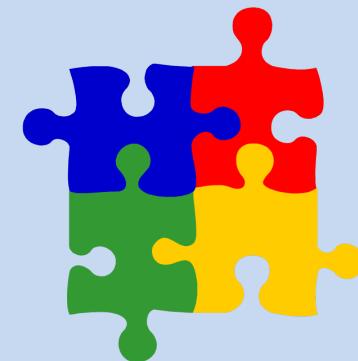


# Transitions

The ***incoming*** board should always:

1. Register for NYS PTA training: Summer Leadership Conference (SLC) & Convention
2. Order any necessary materials and materials
3. Fill any vacancies and/or appoint chairmen if necessary
4. Work on your goals for the year and develop your calendar of events
5. Meet with school administration
6. Ensure that end-of-the-year financial and audit reports are complete to begin your budget work

\* ***At the end of the day, outgoing officers should give their support to the new board, ensuring that they step back & let go as well.***



## Simply Put – Interpersonal Skills are People Skills

*They're the Skills we Use When Communicating & Collaborating with others*

Some of the most common interpersonal skills are:

- Active listening
- Collaboration
- Problem-solving
- Empathy
- Diplomacy
- Adaptability
- Leadership
- Mediation
- Patience



**The Two Interpersonal Communication Skills for Success:**  
**Active listening** is a communication techniques that involve the full and active application to the listener of what is being said.

**Active Listening Clues Include:**

- Eye contact
- Nodding the head
- Smiling
- Verbal affirmations, such as, yes, ahhh, mmhmm

**Body Language:**

- Avoiding eye contact
- Folded arms or legs
- Glancing at a watch, clock or phone
- Yawning
- Fidgeting

## Making the Most of PTA Resources

- <https://www.pta.org/home/run-your-ptas/National-Standards-for-Family-School-Partnerships>
- <https://nyspta.org/>
- <http://createthegood.org/articles/volunteerleadership>
- <https://www.wildapricot.com/blogs/newsblog/2017/05/26/volunteer-teams-have-these-four-types-of-people>
- <http://www2.cuf.org.uk/sites/default/files/volunteering-guidance/building-good-relationships.pdf>
- <http://www.nonprofitinclusiveness.org/>
- <https://www.lambdalegal.org/>
- <https://capta.org/pta-leaders/run-your-ptas/nominations-and-elections/officer-transition/>
- <https://www.txpta.org/ela>

