



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)*

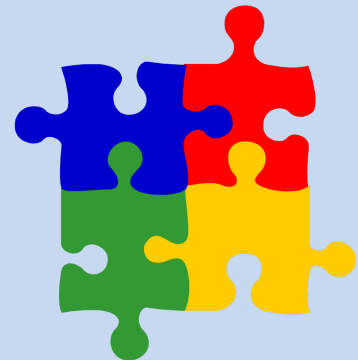


Transitions

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-pta/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-pta/nominations-and-elections/officer-transition/>
- <https://www.txpta.org/ela>

