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# RESOURCE GUIDE

**New York State**

**PTA<sup>®</sup>**

*everychild.one voice.<sup>®</sup>*

**president's guide**

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# president's guide

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## getting started

*“Our members are the source of our strength. Your commitment to the education, health and welfare of all children is making a difference.... It is only when we work together that we can be truly successful. When we speak for every child with one voice we will ensure the success of the next generation. Our children are counting on us. We will not let them down.”*

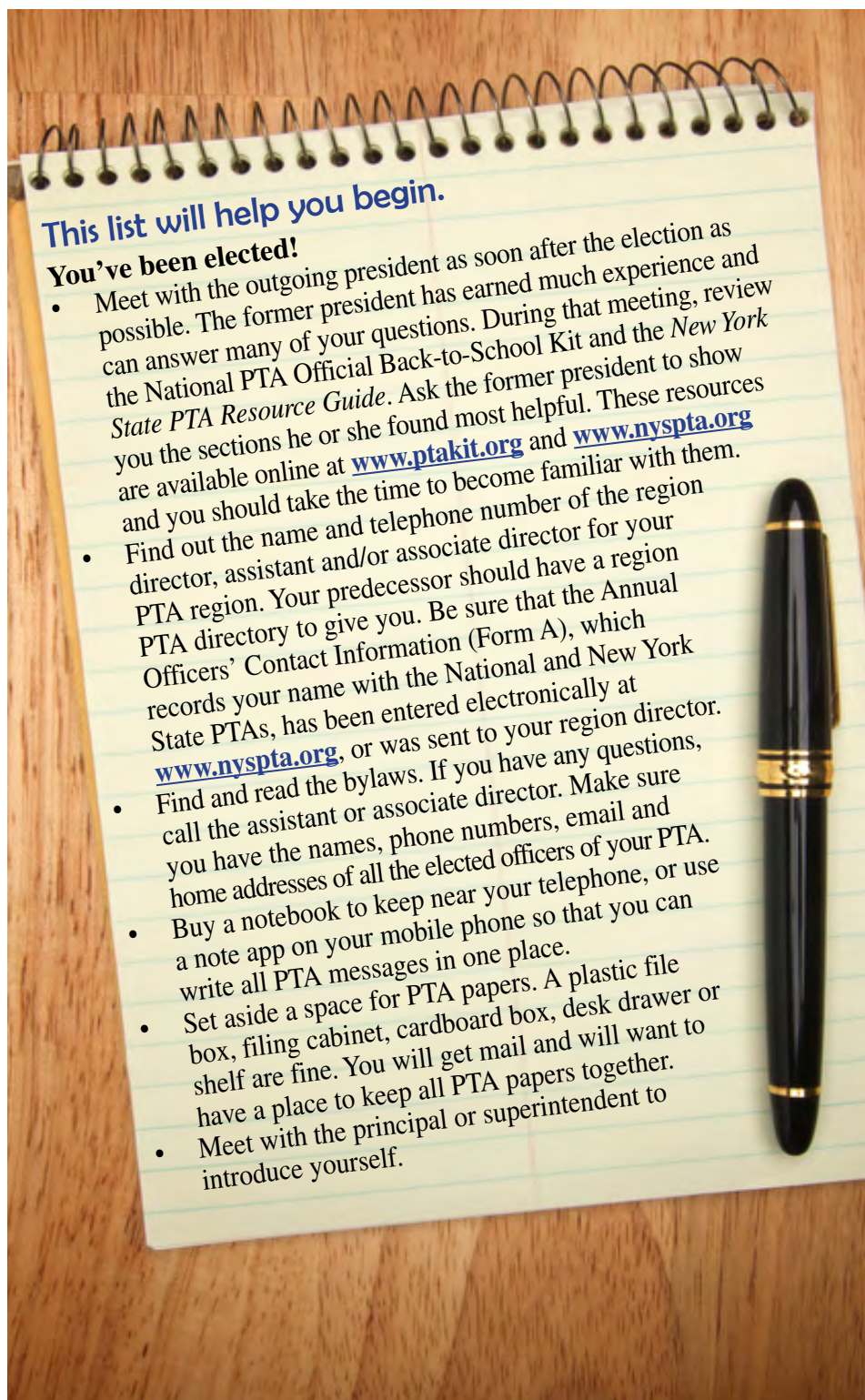
*Jane M. Bernhard, NYS PTA President, 1999-2002*

All PTA presidents accept that job because they have had PTA experience and have been recognized as a leader by their peers. They know that leadership in PTA is a process of ongoing training, and that a president’s primary duty is to build or maintain an effective team of PTA volunteers – one that can get things done. They know that the members who have elected them have faith in them and trust that they will help everyone work together to “ensure the success of the next generation”.

PTA volunteers begin as advocates for their own children and grow into advocates for all children and youth. They know that their contributions matter. That is why you have agreed to take on the role of PTA president!

**“My fondest memories are of the wonderful dedicated people I worked with – and the friends who were so kind. I think of them often....”**

**Edna Polin,  
NYS PTA President,  
1974-1977**



# congratulations on your election as PTA president!

**You have been elected to lead your PTA!** The members of your unit have shown confidence in your ability to represent them, administer the unit's affairs, conduct the meetings and support the other officers, chairs and active members in their work. Does this sound like a big job? It's easier than you might think, if you follow the advice in this *Resource Guide*.

To lead the PTA, you will need **two types of knowledge**: knowledge about the PTA (which is an on-going process of learning), and knowledge about yourself (your strengths, abilities, interests, talents and even weaknesses). Authority alone is not enough to command respect. Respect must be earned.

Knowledge about PTA is gained by reading, asking questions, attending leadership training and supporting board members in their roles. Knowledge about yourself builds confidence. You can receive help with leadership skills you know you want to improve by reading, asking questions, attending leadership training and accepting the constructive input of board members as they perform their roles.

**Leaders are not born.** They develop through learning and experience. You will grow in your leadership position while encouraging others to grow also. Others will follow your example.

Leaders should expect acceptance, fairness, trust, flexibility, respect and a sense of humor from one another.

Leaders strive to:

- Encourage the timid.
- Gently prod the indifferent.

- Spur the most capable to even greater efforts.
- Open up new avenues to the inexperienced.
- Lead by example, motivation and inspiration.
- Delegate as much as possible to people who you have trained for the job!
- Express recognition and thanks.

PTA leaders understand the Purposes of PTA. Before beginning any program or project, a president makes sure it advances one of the Purposes of PTA and has the potential to improve the lives of children.

PTA leaders understand that consensus is important when making decisions because more people will have a stake in making the decision work.

PTA leaders also know that it is important to assign jobs and let people do them, while supporting their efforts. Confidence in those who work with you gives them confidence in themselves and helps encourage future leaders. Others need to be there to carry on after you.

It is important to accept final responsibility.

Stay informed, read your mail and attend leadership workshops!

You will benefit personally and your PTA unit, school and community will benefit.

**You are a leader! Allow your enthusiasm to show! It will empower others!**



## the role of the PTA president

PTA is a private membership association, governed by our bylaws, Purposes, “Basic Policy” and the rules that govern not-for-profit 501(c)(3) organizations.

As president, you are the chief administrator of the PTA unit or council team. You are a person who is interested in your entire school community.

You show respect for the opinions of everyone and accept creative ideas willingly.

### You are not alone.

Your PTA team – executive committee, executive board, school administrators and members – stands beside you. You receive valuable information and support from the region, state and National PTAs.

**You respect the office of president.** You learn about basic parliamentary procedures so that you are comfortable leading the meetings. You are the presiding officer at meetings; you only vote to break a tie and you don't voice your personal opinions during the meeting. You make sure that only PTA members vote and that votes are only taken at official

meetings. You represent the PTA at meetings or other public speaking engagements.

### You are seen as a communicator.

You will be asked to speak on behalf of the PTA from time to time. You will lead the PTA meetings. You will meet and greet new members and help them understand the philosophy of PTA.

Your primary role is to build and maintain a team of volunteers for your PTA. It's up to you to see that each person has the tools and training that he or she needs to do their job. An officer or chair who is prepared to assume leadership will accept tasks you delegate to them willingly. Copy sections of PTA manuals, the bylaws and procedures of the unit or council, and pass on mailings that relate to the job of an officer or chair. Help them get any training they need, at the start of their jobs and during their term. Make sure you also attend training opportunities!

As president, you will help your PTA team understand that:

- A person should only hold one position on a PTA board.
- Committee plans for the year must be approved by the executive board.

- Issues of a personal nature (your child's teacher, a board member's problems, etc.) and complaints should be discussed privately, not during a PTA meeting.
- School concerns of a general nature can be referred to a PTA committee.
- When committee chairs meet with school staff as part of their responsibilities, it is advisable that you, as president, attend also (or that an officer whom you have appointed attends in your place).
- When authorized to present testimony on PTA's views, give only PTA's position. Don't elaborate or present personal views.
- PTA supports or opposes issues, not candidates. This is important to remember at school board and general election time.
- Fliers should have the name of the sponsoring group at the top. (Name) PTA, or Membership Committee of (Name) PTA, or (Name) PTA Executive Board.
- Membership lists (names, home and email addresses, phone numbers) and class lists are to be used **strictly for PTA business**. They are not to be



## the role of the PTA president, con't.

- released to other groups or used for any other purpose. Such lists are to be safeguarded as confidential and are to be used strictly for the PTA's own business as an association.
- People who no longer have children in your school can continue to be a part of your board or your membership, as can grandparents, aunts, uncles, guardians, etc. PTA is inclusive, not exclusive.
- PTA is not a fundraising association. Proper care should be taken in the use of funds. PTAs should not supply items that are the school board's responsibility.
- PTA does not donate to or raise funds for other organizations (IRS regulations).
- Money spent by the unit/council must appear in its budget and must be approved by the membership.
- The president should sign orders, vouchers and/or checks, as specified in the bylaws. **Only the president is authorized to sign contracts.**
- You are a cheerleader, a facilitator, a calming influence, an agent for communication, and someone who promotes understanding – a leader!

## presidents succeed when they...

**Understand PTA** – its Purposes, Beliefs, “Basic Policy” and positions from “Where We Stand”. They believe in the association and are enthusiastic about it.

**Are flexible**, objective and remain calm.

**Are prepared** to act in difficult situations, and have prepared their executive committee to assist them at meetings to ensure that all discussions are courteous and no action is adopted without deliberation and affirmative voting.

**Make each member feel welcome** and help them understand the Purposes of PTA.

**Spend time to learn** about their new job, read their bylaws, attend trainings and read their mail.

**Contact their region PTA** for advice.

**Always make time** for adequate preparation. Delegate the work so that many can share in it. Remember that they are the chair, not the “boss”.

**Remember to say thank you**, to recognize the efforts of others, and to give praise when warranted.

### Make sure that the PTA unit or council is in good standing.

This means:

- Reviewing the bylaws for expiration dates. If expired or due to expire soon, **turn to Section 7 of this Guide to learn what to do next.**
- Making sure that all necessary dues payments have been submitted to New York State PTA by the required deadlines. **Section 6 of this Guide describes all membership responsibilities.**
- With the treasurer, verifying that the insurance premium has been paid.
- Having at least 25 members in the PTA, or three member units in good standing if a council.

Have filled out the Annual Officers' Contact Information (Form A) online or mailed a hard copy to their region director by **June 15** if possible, so that they receive all the materials to which they are entitled.

Plan meetings with their team so that business is over within approximately 30 minutes, and is followed by a speaker or program of interest to the members.

Make sure that recommended PTA financial procedures (for example, having two authorized signatures on all PTA checks) are followed.

Know that most miscommunications can be resolved if all participants are shown respect and courtesy.

If necessary, ask your assistant or associate director or region director for advice or direct intervention through a School of Instruction.

Remember that although PTA serves its school community, only members may vote.

Remember that PTA members are advocates for children and youth. All members want to participate. They want to contribute. They want to make a difference for children.

Know that the contributions the members can make will vary widely according to their interests, talents and available time. Enabling

*continued on page 6*

## presidents succeed when they, con't.

everyone to participate is what makes a healthy, active PTA team! Know that their rewards will far outweigh the amount of work they do.

### you are the chair of the executive committee

- Plan a meeting with the new officers – the executive committee. Find out what they each need as they begin to plan for their new PTA jobs. Share sections of this *Resource Guide* with them either on a disk, hard copy, or forward to them electronically; advise them that the entire guide can be found on the New York State PTA website at [www.nyspta.org](http://www.nyspta.org). Each officer should also meet with their predecessor to obtain the materials for their PTA position.

- Then, meet again to start to plan the PTA year as a team.
- Discuss goals for the year.
- Plan a preliminary calendar for the coming year following the guidance provided on **pages 17-19**.
- Review last year's budget and audit report. Obtain all financial records, bank account information and bank book(s).
- Plan a budget.
- Sign signature cards at the bank that holds the PTA bank account. The president, treasurer and at least one other officer should be signers for the account.
- Review the standing committees. Read the procedures, if you have them. The group may wish to have vice presidents responsible for specific committees, events or activities.
- Review the upcoming training events offered by the region and/or state PTA. It is important that as many members of your unit or council as possible take advantage of these opportunities to learn how to make their new jobs easier and more satisfying to do. Send registrations in on time.
- Set the date for the first PTA meeting. Write out its agenda. Make sure that everyone who should give a report is ready.
- Write a welcome letter that can be included if the school sends a late-summer mailing to parents. Give it to the principal by the end of July to read and approve for inclusion in the mailing.
- Attend the region PTA Membership workshop if possible.

**Sit back and relax. Your year is off to a great start!**

## co-president, president-elect, executive committee

*The president is elected by the unit/council to direct its affairs in cooperation with the other members of the executive committee for the term of office specified in the bylaws. According to generally accepted parliamentary practice, only one person may be elected to serve in any office. And, only one person can be designated as the official contact person for the region PTA, New York State PTA and National PTA.*

### co-presidents

It is the responsibility of the nominating committee to nominate one person for each office to be filled.

Co-presidents may be nominated only if:

- the bylaws provide for co-presidents
- a search for a president has been exhausted

### *Co-presidents mean two individuals sitting in one seat*

The association must designate the co-president who will carry the vote of the association on issues that require the vote of the president. At board meetings only one person may preside (lead the meeting); the "co," therefore, forfeits the right to make motions, debate or vote. Should both "co's" be present at a meeting, the second "co" may speak only at the discretion of the presiding officer.

Co-presidents share the responsibility of the position and are held accountable for the decisions of both individuals.

Should it be the decision of the association to elect co-presidents, very clear guidelines must be established in order to avoid confusion, controversy and complications.

The co-president guidelines must be clear to everyone with whom they work: officers, chairs, school staff, principal, superintendent and PTA members. Such guidelines should be included in the association's procedures.



## president-elect, executive committee, con't.

### president-elect

The use of president-elect may be considered as an alternative to co-presidents. However, it is a decision that must be very carefully considered.

The office of president-elect exists only if expressly provided for in the unit/council bylaws.

Once having elected a president-elect, the members never vote on any candidate for the office of president, but elect a president-elect and the other officers as listed in the bylaws.

Having served a full term as president-elect, that member automatically becomes president for a full term. After electing a president-elect, the assembly cannot alter its decision regarding the succession of that person to the presidency unless the office is vacated during the term as president-elect.

When the unit/council bylaws provide for a president-elect, it is usual to also provide that if the president should be absent or if the office of president should become vacant between elections, the president-elect shall preside or shall fill the vacancy. Without such a provision, the first vice president would preside in the absence of the president and may complete the president's term. It is also customary to provide in the bylaws for some method to fill a vacancy in the office of president-elect, should one occur between elections.

The bylaws can assign the president-elect specific responsibilities.

### executive committee

The executive committee consists of the officers elected by the general membership of a unit and by the voting body of a council and are responsible to those who elected them.

The primary role of the executive committee is to work as a collaborative team to help plan the activities and programs of the unit or council, and to perform such specific functions as are listed in the bylaws and procedures. The executive committee appoints chairs.

The president, as presiding officer, presides at all meetings of the executive committee, which are private.

The executive committee members should learn their responsibilities as quickly as possible after their election to ensure an easy transition. Executive committee

members have fiduciary responsibilities as outlined in **Section 3, The PTA Board**, and should take care to perform their duties with this in mind. Officers are covered by the PTA Directors and Officers insurance (as are committee chairs).

Members of the executive committee should be prepared at every meeting to report on matters for which they are responsible. They should each maintain a binder, file box or folder for their PTA papers. Copies of the minutes, agendas, committee reports, treasurer reports and any other items needed by the membership to be informed about the work of the PTA, should be brought to every meeting.

The executive committee appoints chairs; the executive board approves their plans of work and creates committees.



## representing the PTA

As a PTA leader, **you represent the PTA wherever you go.**

Whether it is the supermarket, the mall or the school, people see you and think PTA. You cannot get away from it. If someone asks your opinion on an education-related topic, your answer will be thought of as the official position of the PTA. No matter how loudly you claim that an opinion is your own and not the PTA's, it will be interpreted as a PTA opinion.

You must be careful that you always represent the PTA accurately, fairly and with dignity. If you do not, the PTA and, ultimately, the children will suffer.

Because you are a PTA leader, it is important that your statements actually represent the PTA position on issues. If your opinion is different, keep it to yourself. It is also important that you know when you can speak for the PTA and when you cannot.

Only the president, the executive board, or the executive committee of a PTA may authorize a member to speak for the PTA. When you do speak officially for the PTA, be sure your statements accurately represent the PTA position.

Official PTA positions may be found in many places: PTA Purposes, National PTA Legislative Program and other National PTA printed material; in many of the state PTA publications, including "Where We Stand", "Basic Policy", Mission Statement and Beliefs; and in region PTA publications. When you are in doubt about a position, call your assistant or associate director, the region PTA legislation chair or the region director.

**It is also important to remember the basic policies of the PTA when officially representing the PTA.** It is important to know, for example, that if you are representing the PTA while wearing the button of a candidate for public office, you are violating PTA's nonpolitical status and may be jeopardizing PTA's 501(c)(3) status.

PTAs will want to study issues of concern to their community and be able to speak intelligently on those issues when necessary. This is just what PTAs should do!



*As a PTA leader, you represent the PTA wherever you go.*

When someone raises a concern at a meeting, take the time to research whether or not it is an issue upon which PTA already has a position.

If not, and the membership or executive board concurs that the issue warrants study by the PTA, you can establish a committee to do so. Give the committee time to work and ask them to report back at a future PTA meeting. The committee should report at that meeting and present their research.

If consistent with PTA policies, and worthy of further deliberation, study or action, the membership can vote on the committee's recommendations.

## presiding at meetings

The president presides at executive committee, executive board and general membership meetings of the PTA. If unable to attend a specific meeting, the president shall ask a member of the executive committee (usually a vice president or president-elect) to preside. The bylaws describe the minimum required number of each of these meetings.

Executive committee meetings are open only to the elected officers of the association as listed in the bylaws. Guests may be invited to report on specific items, but should not attend the entire meeting. Minutes should be kept, but are distributed only to the committee. These meetings may be held at a home, library, school room, school cafeteria, etc.

Executive board members are listed in the bylaws. A meeting of these members can be held separately from general membership meetings although many PTAs hold all monthly meetings as executive board meetings. In that case, the business portion of the meeting should be brief. Committee reports are given and if action is recommended, the members may vote. In those instances, a program should follow the business.

General membership meetings may be planned around special programs. A guest speaker or workshop may be sponsored by the PTA and the program may be open to a large audience. If any business needs to be conducted during this meeting, it is important to remember that only PTA members may vote.

## presiding at meetings, con't.

Although the president is an ex officio (“by virtue of office”) member of all committees, except the nominating and auditing committees, he or she does not preside at committee meetings – the committee chair does. The president may attend all committee meetings, except nominating committee meetings.

### preparing for a meeting

- Have a copy of the bylaws, procedures, minutes, budget and Roberts Rules of Order Newly Revised at every meeting.
- Reread the minutes of the last meeting. What was decided?
- Is there unfinished business?
- Write out an agenda and make copies.
- If someone has to give a report, ask how much time he or she may need, so that you can plan the agenda and they are prepared. A gentle reminder is always welcome.
- Make sure the meeting space has been reserved, and that any props needed (microphone, tables, chairs, hospitality, etc.) are reserved or arranged.

### at meetings, the presiding officer shall:

- Preserve order while establishing a climate in which members feel comfortable in participating.
- Follow standard order of business with a prepared agenda. Remember that you must have a quorum (minimum number of members present, as defined in your bylaws) in order to conduct business requiring action.
- Refer to him/herself impersonally as “the chair.”
- Start and end the meeting on time.

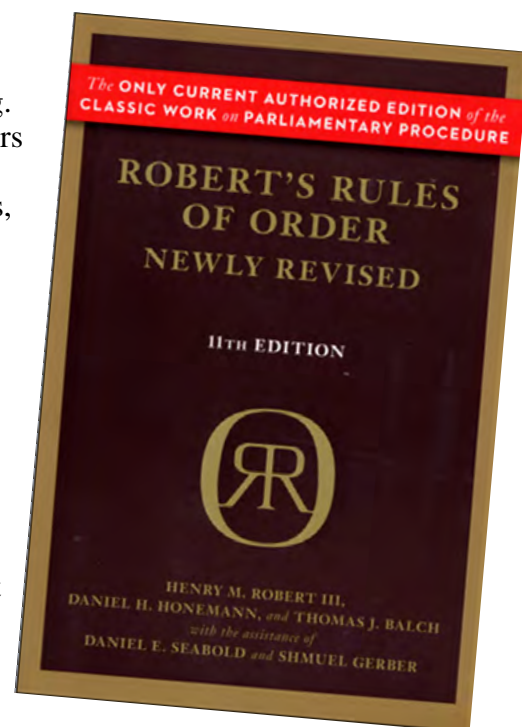
- State motions clearly after they have been seconded and before allowing discussion.
- Maintain a fair and impartial position at all times.
- Refrain from entering the discussion. Avoid personal bias when presenting information.
- Recognize members who have not spoken to the question, in preference to those who have.
- Decide parliamentary questions, subject to appeal. Seek parliamentarian’s approval if available.
- Put any motions to a vote and declare the result.
- Vote when voting is by ballot or to break a tie (not advisable when vote is by voice or show of hands in order to maintain impartiality).
- Use a gavel at a large meeting and only when necessary by rapping it once or twice.
- Maintain order at all times. If order cannot be achieved, adjourn and reschedule the meeting.
- It is the responsibility of the entire group to contribute to the smooth flow of a meeting. Executive committee members should assist the presiding officer. Listening for motions, taking care of issues such as room temperature, and helping any discussions to be conducted in a respectful manner, are valuable ways the members can assist the president to lead a win-win meeting.
- Distribute any PTA materials or mail to the appropriate officer or member at the start of the meeting.
- Remember to thank everyone at the end of the meeting and announce the date of the next meeting.

### five elements of a good meeting

- Clear purpose
- Role for everyone
- Respect everyone’s time
- Involve everyone
- Fair decision-making process

### an effective team

- An energetic group of people
- Committed to achieving common objectives
- Who enjoy working well together and
- Produce high quality, planned results



## agenda: how to chair a meeting

*Good meetings don't just happen – they are the result of good planning.*

- Be prepared; plan ahead.
- Prepare an agenda.
- Make a copy of the agenda and give it to the secretary, who should sit next to the presiding officer. Have copies of the agenda available for those attending.
- Secretary can see what may have been skipped and quietly bring it to the presiding officer's attention.
- Stand when presiding, except when someone is reporting. When a report has been completed, stand and ask for any questions. You have better control of a meeting when you stand.

### order of business

<p><b>Call to Order</b> President rises, raps gavel once, and calls meeting to order on time.</p>	<p>“The meeting will come to order.”</p>
<p><b>Opening ceremony (optional)</b></p>	<p>Pledge, inspirational thoughts.</p>
<p><b>Establishing a Quorum (refer to bylaws)</b> No business requiring action can be conducted until there is a quorum.*</p>	<p>“We have the proper number of members present to conduct business.”</p>
<p><b>Reading and Approval of Minutes</b> Secretary stands to read minutes – speaks clearly. (If minutes have been mailed, reading is not necessary.)</p>	<p>“The secretary will read the minutes of the meeting” or “You have received the minutes.”</p>
<p>Presiding officer asks for corrections to minutes.</p>	<p>“Are there any corrections to the minutes?”  “If there are no (further) corrections, the minutes stand approved as read (as corrected).”</p>
<p><b>Treasurer's Report</b> No motion needed for adoption, unless report is audited.</p>	<p>“May we have the treasurer's report?”  “Are there any questions? If not, the report will be filed for audit.”</p>
<p><b>Correspondence</b> Summarized unless brief or someone requests that the entire letter be read.  Correspondence requiring no action is read by secretary. Letters requiring action are left for chair's report or new business.</p>	<p>“Is there any correspondence?”</p>
<p><b>Committee Reports</b> Executive Board Brief report of business transacted. No action is taken.</p>	<p>“The secretary will report for the executive committee.”</p>

*\*Reports needing no action can be presented in the absence of a quorum.  
A quorum can be established at any time during the meeting.*

## how to chair a meeting, con't.

Recommendations (if any) should be voted on by the membership at this time to dispose of business more rapidly.	“You heard the recommendations of the executive board. What is your pleasure?” (Follow steps for a motion.)
<b>Standing Committees</b> Contact chairs of standing committees prior to the meeting. If they have reports, the reports should be brief. No motion for adoption is needed unless committee reports contain recommendations for action.	“We will hear the report of the _____ committee given by _____”  “Are there any questions or discussion in regard to this report? If not, the report will be filed.”  (Express thanks for work.)
Motion is usually made by chair. Needs no second since it is a committee report.	“The _____ committee moves that the association _____. Is there any discussion?” (See <b>“Handling a Motion”, p. 12.</b> )
<b>Special Committees</b> Report(s) can be progress made or final. (Special committees are automatically dissolved when their work is done and final report filed.)	“We will have the report of the _____ special committee.”  “Are there any questions or discussion? If not, the report will be filed.”
<b>Unfinished Business</b> Minutes of previous meeting will show if any business was postponed. Secretary prepares a list of items pending. Otherwise, this is not on the agenda.	(Only if there is unfinished business pending.)
<b>New Business</b> Chairs or members may present new matters for consideration.	“New business is now in order. Is there any new business?”
A motion is necessary before discussion if a vote is necessary.	
<b>Announcements</b> Date of next meeting(s).	“Are there any announcements?”
Program (may also be given after adjournment)	“ _____, our program chair, will introduce the program.” (Thank participants.)
<b>Adjournment</b> No motion is necessary for adjournment. May be adjourned by general consent.	“If there is no further business (pause), the meeting will stand adjourned (with one tap of gavel).”

# parliamentary procedure

## Robert's Rules of Order Newly Revised is the parliamentary authority for PTA.

Parliamentary procedure is designed to maintain order, insure justice and equality, expedite business and enable an organization to accomplish the objectives for which it was formed. It should be used in every PTA meeting. It isn't difficult to do and most members are not experts. The following tips will help PTA officers and committee chairs to use parliamentary procedure effectively.

### parliamentary principles make common sense!

- All members have equal rights to introduce business, make motions, participate in discussions and vote.
- The presiding officer should be fair and impartial.
- A majority of those present and voting decides an issue.
- Motions that limit members' right to debate or that require notice to protect absent members (e.g. "Amend the bylaws") require a yes vote from 2/3 of the members present and voting.
- The person making a motion has the right to speak first.
- No one can speak a second time on a motion until everyone who wants to has spoken once. No one may speak more than twice.
- Only one person speaks at a time.
- A member has a right to know what the question is before a vote is taken.
- Be sure a motion is made before discussion starts if

the issue will require action. The presiding officer can ask someone to make the issue into a motion.

- When speaking in debate, personalities should be avoided.
- The motion can be attacked, but not the person.
- Quorum is the number of members required for a vote to be held, and is listed in bylaws. If you do not achieve quorum, you can discuss and you can have educational programs, but you can't vote.
- Debate can be limited by unanimous consent or a 2/3 vote. Debate can be stopped by a motion for the "previous question", which must be seconded, is not debatable, and needs a 2/3 vote. It is a good idea to set time limits before debate starts.

Use a gavel sparingly. Rapping it once or twice, loudly, should be enough to attract attention.

PTAs should vote on all important issues.

Only members may make motions, discuss and vote. A vote should always be taken whenever there is:

- An election
- A budget to be adopted or amended
- Bylaws to be adopted or amended
- Money to be spent or allocated
- An action to be taken by the PTA

### steps to handling a motion

- 1) Member is recognized.
- 2) Chair recognizes the member.
- 3) The members says, "I move to..." or "I move that..."
- 4) Someone seconds the motion. This shows that more than one person is interested in the issue.

Don't rely on chance. If you are expecting a committee report at the meeting, contact the chair to make sure he/she will be there. If the chair can't attend, ask that a report be sent or that someone else make the presentation. You should receive a report in writing. Keep in contact with your officers and chairmen, not to harass them, but to show you care about how their work is going.

**As president, you, after all, are ultimately responsible.**

- 5) The chair restates the motion. This ensures that everyone understands what is to be discussed.
- 6) Discussion is held on the motion. Alternate between those in favor and those opposed.
- 7) The chair puts the motion to a vote. "All in favor, say 'aye', all opposed say 'no'."
- 8) The chair announces the results of the vote. The issue is decided.

### amendments

A motion that is being discussed may be amended by adding, removing or changing words. Amendments must be seconded and voted upon individually before the motion itself goes to a vote.

### referring to committee

If an issue is complex, causes lengthy debate or is on a topic that needs research, the best course of action is to refer it to a committee for study. Ask the committee to report back to the membership by a specific date. Their report or recommendation can then be voted upon.

## chairing a tough meeting

PTAs are facing more and more issues about which people have very strong feelings. As a grassroots organization, the stress of conducting meetings involving difficult issues can be acute. We hope these ideas will help you.

### preparing for the meeting

Consider having a meeting of your officers or committee members to plan the meeting. Don't plan to silence anyone – allow all points of view to be expressed.

- Look at the issues as objectively and impersonally as possible.
- Check PTA sources for existing positions and methods of action. This includes the state and National PTA resource guides and other publications. The issue may not require any action. Be sure you know beforehand.
- The more current the issue, the more important it is to check with region PTA sources for recent information. Call

your assistant or associate director, appropriate chair or region director for advice or assistance. If desired, invite a region representative to the meeting.

- Prepare an agenda.
  - List specific items you think can be managed in the time available.
  - Present a clear message to all concerned that this is what will be dealt with. If necessary, use an easel pad or blackboard to show the agenda.
  - Have a committee prepare information relevant to the issue to report to the group before the discussion begins.
- You may wish to invite your assistant or associate director as a resource person and guest.

### ready or not — here's the meeting hour!!!

*Use Robert's Rules of Order Newly Revised to your advantage.*

- Conduct the meeting as formally as possible. See "Agenda: How to Chair a Meeting".
- Be sure, as presiding officer, that the meeting is conducted impartially and fairly. If you have strong feelings that could affect your neutrality, you can have your vice president chair the meeting so that you can participate.
- Set special rules beforehand, such as the number of times a person may speak to any one item, or time limits for all speakers. The president does not have to recognize a speaker who may be trying to dominate the floor; he/she can announce beforehand that everyone will be called upon once before someone is allowed to speak again.

*continued on page 14*



## tough meeting, con't.

- If the group continues to disagree, it might be advisable to appoint a committee to look into the issue. Don't hesitate to ask for a motion to refer to committee. Those who have expressed strong feelings should be appointed to the committee.
- Call the issue "out of order" if speaker departs from the agenda, enters into personal comments not related to the subject at hand, interrupts another speaker, or in any way becomes abusive of any members' rights. Preserve the right of an individual to speak only as long as he/she does not abridge the rights of others.
- Check your bylaws for any limitations or obligations concerning your PTA's activities.

Whatever happens, keep your perspective by maintaining neutrality and your sense of humor. If you do this, you can resolve the meeting peacefully and constructively. No rules can take the place of tact and common sense on the part of the chair.



The ability to lead group discussions is important. The ability to handle controversy during a meeting is sometimes a problem. Here are *five* helpful suggestions.

- 1) It's easier to handle people who belong at your meeting. In large gatherings, people who speak should identify themselves. Only members may propose action or vote.
- 2) Encourage everyone to participate. Don't let anyone monopolize the discussion.
- 3) Don't criticize those who speak up. A leader who does so can expect to face a withdrawn or hostile audience.
- 4) Prevent disagreement and antagonism whenever possible. Make the most of areas of agreement. If tempers flare, intervene or call a recess to cool things off; if necessary, adjourn and reschedule.
- 5) Don't monopolize discussions. Give everyone's ideas precedence over your own. The leader is a listener rather than a talker.

## resources for presidents

On all levels, PTA provides resources, leadership training, representation and opportunities for participation.

Unit and council PTAs are 501(c)(3) not-for-profit organizations which are exempt from federal taxes, as well as entitling them to make purchases of materials for PTA purposes which are exempt from NYS Sales Tax, and to receive tax-deductible donations.

### how the region PTA serves the local unit/council:

A directory containing the names, addresses, email addresses and phone numbers of all region PTA board members is provided.

Assistant directors and associate directors (ADs) are available to provide assistance when requested.

Region PTA officers and chairs are available to answer questions on specific topics and to provide resources.

Notice of events and issues is sent by newsletters or mailings, or appears on the region website.

Region PTAs offer a variety of conferences and workshops for local units and councils, providing an opportunity for leadership training and a chance to explore the function of PTA beyond the local level. These may include:

- Fall Conferences
- Spring Conferences (annual meetings)
- Presidents and Officers Round Table
- Legislation workshops and seminars
- Presidents and Principals Dinner
- Resolutions workshop
- Membership workshops



## resources for presidents, con't.

- Schools of Instruction
- Workshops and seminars relating to various chairmanships and for parent education
- Region PTA Reflections Award celebrations
- Region PTA represents you on many committees, commissions and boards of directors
- Region PTA represents you at hearings of local government agencies and at state hearings
- At the region PTA annual meeting, you elect officers and vote on bylaw changes

### assistant/associate director:

- Is a direct link or liaison with the region PTA.
- Is an advisor and confidante.
- Can explain the region PTA, how it functions and what it offers.
- Is called on when problems arise.
- Is well informed on PTA policy and current positions.

### how New York State PTA serves unit/council/region PTAs:

New York State PTA offers many resources via email, the NYS PTA website, and social media.

- [New York Parent Teacher](#), published electronically four times a year.
- “[Advocacy Newsbriefs](#)” is a monthly (not produced in July or November) report to assist members in their advocacy efforts.
- “[Fast Facts](#),” a bi-weekly e-newsletter for leadership.
- “[NYS PTAAlert](#),” a bi-weekly membership e-newsletter.
- [New York State PTA Resource Guide](#).
- New York State PTA website, [nyspta.org](#), with resources, up-to-date information, and links.

- New York State PTA on Facebook, [facebook.com/nyspta](#), features news and links to information.
- New York State PTA on Twitter, [twitter.com/NYSPTA](#), for news and event updates.
- The Voice of NYS PTA, [nysptapresident.blogspot.com](#), for thoughts and commentary from the NYS PTA President.
- New York State PTA on YouTube, [youtube.com/user/NYSPTA](#), for event and training videos.
- New York State PTA on Pinterest, [pinterest.com/nyspta](#), for resources and inspiration.
- New York State PTA on Instagram, [instagram.com/new\\_york\\_state\\_pta](#), for graphics and event updates.
- **NYS PTA App**, powered by Blackboard, from [Google Play](#) or the [App Store](#).

State coordinators, specialists, region directors and officers are available to answer questions and provide information on specific subjects. They write articles for the publications.

State coordinators, specialists, region directors and officers conduct leadership training workshops at state PTA events and administrate awards.

New York State PTA provides a voice in Albany representing PTA concerns before the state legislature and government agencies.

Events include the New York State PTA Annual Convention and Summer Leadership Conference.

Units receive Directors and Officers coverage liability, insurance coverage and fidelity bonding for a lesser fee than if contracted individually.

Region directors are in direct contact with and kept up-to-date by the New York State PTA Board of Directors and bring concerns to and information from the New York State PTA.

### how National PTA serves unit/council/region PTAs:

Maintains a website: [pta.org](#)

All presidents receive:

- A copy of the *Our Children (OC)* periodical
- The Official PTA Kit at [ptakit.org](#)
- Electronic newsletters

National PTA representatives conduct leadership training workshops at conferences and conventions, and conduct the National PTA Reflections program.

National PTA provides a voice in Washington representing PTA positions before Congress and government agencies. Through its resolutions, it provides a vehicle by which concerns that are national in scope can be addressed throughout the nation.



Download the NYS PTA App, powered by Blackboard, from **Google Play** or the **App Store**

## tips for using tools...

### basic agenda outline

*Have an agenda for every meeting, including committee meetings. It tells everyone what will happen and provides you and the members with a convenient record of the meeting.*

- Date, time and location of meeting
- Opening – Call to Order
- Number needed to establish a quorum
- Reading and Approval of Minutes
- Treasurer's Report
- Correspondence
- Reports of Officers, Board and Standing Committees
- Special Committee Reports
- Unfinished Business
- New Business
- Announcements
- Program
- Adjournment – including date of next meeting

### PTA paperwork

- Has to get done. Deadlines should be met as closely as possible. Perhaps another officer can assist in some of these tasks.
- Always use the correct form and put your unit name and unit code number on all paperwork and checks. Some forms are included in this *Guide*.
- Try to handle all paper and electronic documentation only once. Distribute what should go to chairs or other officers. A portable file box that can be carried to meetings is one way of controlling mail. For electronic mail, creating folders

and filing after reading and forwarding the information will help you keep organized.

- Make lists of outstanding tasks, or “to do” reminder lists. Note the most important tasks on the lists, and mark them off when they are completed. The goal of time management is to accomplish the most important things.

### telephone, calendar, computer

#### the telephone

- Is a valuable tool. Use it as such.
- Put your family first. Dinner time or bedtime should be protected time. Use an answering machine or voicemail. Set a time for the first call in the morning and the last call at night and stick to it.
- If a caller has a difficult question or calls at a bad time, say “Let me find out and I’ll call you back”. If you say this, do call back.
- Don’t panic if what you hear is alarming. Remain calm and listen. Ask questions. Take notes in your phone log. Find

out names of others involved and to whom you can speak. Listen.

- Return all calls and texts within a reasonable time.
- Keep a log of all calls and save text or copy them to a file or log as a record of the contact.

### the calendar

- Is a PTA leader’s lifeline. Keep it handy.
- Put all dates on the calendar - including family events and personal time, and make sure to coordinate with your phone or any other electronic calendars that you make keep.

### electronic media

- Computers can create wonderful fliers, attractive newsletters and make paperwork easy to do and keep.
- Email and texting is also helpful but must be used with caution.
- While most members have computers and use email, remember that some may not.
- Email and texting can be used to notify members of important events but make sure to use other methods as well. Respect privacy and use email carefully.

### procrastination (“I’ll do it tomorrow”)

Procrastination in a leader plays havoc with logical, sequential planning and leads to hurried, last-minute decisions.

- “Divide and conquer” if you’re overwhelmed by the task. Divide a large task into small, manageable ones.
- Delegate to the appropriate officers or chairs, early and often.



## suggested calendar

*This is only a guide! Check your bylaws and procedures, and National PTA's materials.*

### july/august

- Read the *New York State PTA Resource Guide*.
- Make certain all materials have been turned over to new officers and chairs.
- Prepare budget and programs for the next PTA year with appropriate committees. Check bylaws and procedures regarding "Plans of Work."
- Plan your membership drive; meet with principal and staff members to discuss the year's goals, plans, etc. Assign someone to attend the region PTA membership workshop.
- Consider holding an orientation for your board members.
- Check your bylaws. They must be approved by the New York State PTA every three years. You will find the Bylaws EZ information on the website ([www.nyspta.org](http://www.nyspta.org)) or contact your region PTA bylaws chair for help.
- Unit treasurer files signature cards with bank, if necessary.
- Make sure the Annual Officers' Contact Information (Form A) was filed electronically or printed and mailed to your region director.

### september – membership enrollment month

- Start your membership campaign.
- Set dates for executive board and general membership meetings if not already done.
- If possible, present proposed budget to executive board for approval before presenting to the membership for adoption at the first general membership meeting. If not, prepare to present it at the first meeting

and to answer any questions that may arise.

- Treasurer should prepare the appropriate **IRS 990 form** (based on income) for filing **before November 15**.
- Chairs report on their plans for the year; executive board must approve plans before work begins.
- Remind board members that PTA is tax-exempt; give them a Sales Tax Exemption form to use when making approved PTA purchases.
- Review convention packet and resolutions with members, so that delegates can truly represent your PTA at Convention.
- Vote to send representatives to the state Convention.
- Share Reflections information with appropriate chair and persons in your school.
- Encourage members to attend your region PTA Fall Conference (if held) and preregister them.
- Remind all board members that they must be members of the unit.
- Submit articles to the newsletter editor on a regular basis.
- Review award and scholarship deadlines.
- Send to your region PTA assistant or associate director the names of officers and chairs, bylaws, budget, newsletters and program fliers (throughout the year).

### september/october – general membership meeting – open house

- Ask to join the principal in welcoming parents and staff back to school at open house - invite all to support PTA!
- Membership dues are collected.

- Treasurer presents budget to the general membership for adoption.
- Present report of audit committee, if specified in bylaws.
- Consider electing nominating committee members from the general membership at this time.
- Send first dues payment to the state office so that it arrives on or before **October 31**. If your initial payment is not received by this deadline, your unit will not be eligible for state membership awards at the end of the year. Remember that two signatures are required on all PTA checks.
- Continue membership enrollment.
- See that Convention attendees/delegates register online.
- Attend your region PTA Fall Conference (if held).
- Publicize Twin Projects (Jenkins Memorial Scholarship for Teacher Education, NYS PTA Teacher Fellowship for Graduate Study in Memory of Richard Gazzola), Community Service Award and Family Engagement Award in Honor of Jami-Beth Knapp in your newsletter. Check the New York State PTA website at [www.nyspta.org](http://www.nyspta.org) for deadline information.
- Check that guidance counselors have received the information and remind high school students to apply for the Jenkins Memorial Scholarship for Teacher Education. Information is sent by **September 30** to all public high schools that have a PTA unit in good standing (it is not longer applicable)

*continued on page 18*

## suggested calendar, con't.

to just having a PTA in the school district). Give unit code number to guidance counselor for the Jenkins Scholarship application.

### november

- Continue membership enrollment. Send dues to the state PTA office regularly on proper forms.
- Attend New York State PTA Convention. Afterwards have delegate(s) report to your members and include report in your newsletter. Decide on priorities for action.
- File 990 form with IRS before November 15.
- Celebrate American Education Week.
- Reflections entries should be submitted to your region PTA according to its deadline.

### december

- Check with unit treasurer that dues payments to the state office are up to date.
- Make plans for Founders Day observance in February.
- Appoint a committee to consider a recipient for an Honorary Life Membership or other appropriate state or National PTA award.
- Check bylaws to see when your nominating committee should be elected, if you have not done so already.

### january

- The New York State Legislature reconvenes early this month. Carefully read all region, state and National PTA legislation materials. Plan for any action.
- Finalize plans for Founders Day. Invite your past presidents to be part of the program.
- Be sure your nominating



committee is elected in accordance with your bylaws.

### february

- **Celebrate Founders Day, February 17.**
- Continue legislative activity.
- Check bylaws to determine when nominating committee reports.
- Continue enrolling members and sending dues payments to state PTA office.
- Check the New York State PTA website at [www.nyspta.org](http://www.nyspta.org) for appropriate award information and deadlines.

### march PTA advocacy month

- Plan to participate in Virtual Lobby Day.
- Plan for Teacher/Staff Recognition Day.
- Plan meeting to review and discuss the proposed school budget.
- Plan an open community forum to meet and hear candidates for the school board. (Refer to PTA and School Board Elections in **Section 8 – PTA Advocacy.**)

- Plan and participate in an Advocacy Month activity.

### march/april – general membership election meeting

- Nominating committee report is presented.
- The election is conducted in accordance with the bylaws.
- Remind teachers that applications for the New York State PTA Teacher Fellowship for Graduate Study are available after April 1 from the New York State PTA website at [www.nyspta.org](http://www.nyspta.org) or by calling 1-877-569-7782.

### april

- Decide on delegates to attend your region PTA Spring Conference (annual meeting) and pre-register them.
- Send proposed convention resolutions to state PTA office **prior to April 15.**
- Appoint audit committee or auditor according to bylaws if you haven't already done so and remind members to submit bills before audit.
- Watch for reminders for region/state summer workshop(s). Plan to attend.
- Insurance will be billed to each unit by AIM; **payment is due before June 1.**

### may

- Attend your Region PTA Spring Conference (annual meeting).
- Fill your chairmanships according to your bylaws.
- Remind members to vote on the school budget and school board election.
- Fill out the Annual Officers' Contact Information (Form A) online at [www.nyspta.org](http://www.nyspta.org) or mail a printed form to your region director immediately

## suggested calendar, con't.

following election. This information tells National PTA, New York State PTA and your region PTA where to send important documents, including insurance certificates and leadership guides.

- Be sure the unit treasurer sends the final dues payment in plenty of time to arrive in state office on or before **May 31**. Dues received after that date will not be applied to your membership numbers for this year or next. Remember that two signatures are required on all PTA checks.
- Remind chairs and officers to have procedure books and PTA materials ready to transfer to their successors. These are the property of PTA.
- Recognize your teachers and staff on Teacher/Staff Recognition Day.
- Plan to attend the region PTA Presidents and Officers Round Table. If you are an outgoing president, be sure to inform the new president about the workshop.
- Remind teachers about the deadline for New York State PTA Teacher Fellowship for Graduate Study in Memory of Richard Gazzola applications.

### may/june – annual general membership meeting

- Hold annual meeting in accordance with bylaws.
- Present report of audit committee



as specified in bylaws.

- Officers and chairs give annual reports.
- Installation of officers can be held. Invite a region PTA official to install new officers.

### june

- Call a joint meeting of outgoing and incoming executive committee and executive board.
- Attend the region PTA Presidents and Officers Round Table sponsored by the region PTA or your council.
- Go through your files and share any other necessary information with the new president.
- Set up a committee to prepare the budget for the next year. Be sure to budget for insurance, PTA region functions (workshops, conferences, Presidents and Principals Dinner), and state PTA events (Summer Leadership Conference and Convention).
- Set up a calendar for the coming year:
  - Check the bylaws for required meetings (month for adoption of budget, election of nominating committee, election meeting and annual meeting).
  - Consult with the administrator or principal to be sure there are no conflicts between school or district programs and PTA functions.

**Remind chairs and officers to have procedure books and PTA materials ready to transfer to their successors**

dates should precede programs/activities in order to publicize them.

- Have a budget meeting and include the treasurer as chair, the ways and means chair and the membership chair. They must plan and work together to fund programs and activities, leadership training and attendance at PTA conferences.
- Plan programs:
  - Meet with appropriate chairs, administrator and teacher representatives.
  - Review goals for the year and discuss long-term goals.
  - Request input from board members about ongoing projects and activities.
- Discuss and plan fundraisers if necessary.
- Make sure your officers and chairs have included their email on the Officer Contact Information (Form A) so they will receive your region PTA newsletter, *New York Parent Teacher*, and National PTA's *Our Children (OC)*.
- Check expiration date of bylaws. If bylaws have not been revised in more than three years, select a committee to review and update them as necessary. Bylaws must be submitted to your **region PTA bylaws chair 90 days prior to expiration date**.
- All outgoing officers and chairs should turn over materials and reports to incoming officers and chairs.
- Check **Section 10** of this *Guide* and our website at [www.nyspta.org](http://www.nyspta.org) for appropriate award information, deadlines and current fees, if any.

## remember...

It's easy to be a PTA unit or council in good standing if you and your PTA team pay attention to the simple rules all PTAs are required to follow. Don't hesitate to ask for help from an assistant or associate director, chair or the director from your region PTA. They are experienced PTA leaders who have volunteered to help. If a unit or council is not in good standing, this may impact students and individual members, as well as the unit, disqualifying them from awards or events.

- Consult the principal/administrator before publicizing PTA activities in the school. Make sure that the principal reads through any fliers or materials that are intended to be distributed in the "backpacks". The principal or administrator is ultimately responsible for everything that is sent home from the school, and he or she should review all materials. If information is misquoted, he can alert you and work with you to ensure that communications are timely and accurate.
- If contacted by the media, request the person's name, whom he/she represents, and the reason for the call. Take the time to be sure your answers are accurate and are according to PTA policy, not your opinion.
- A unit/council NYS Sales Tax tax-exempt number legally cannot be used by other groups.
- Remember, PTA does not donate to or raise funds for other organizations (IRS regulations).
- Repeat meeting and program agendas to reach parents who are working, if possible. Have community, region PTA, state PTA and National PTA resources available.
- Expect membership turnover, as in any volunteer organization. Training of PTA leaders is an ongoing activity. Take advantage of fresh ideas and the enthusiasm of new members.
- Do try to reach out to new members. Don't run your PTA as a clique. Extend special invitations to new families, neighbors and former members who are not as active as they used to be. Do invite someone from your region PTA board to attend a meeting. They can bring New York State PTA to your members who may never be able to attend a region, state or national event.
- Those who pay dues have a right to participate in decision-making on how to spend money and a right to an accounting of how it is spent.
- Membership lists (names, home and email addresses and phone numbers) and class lists contain confidential information. **They are to be safeguarded to protect the privacy of PTA members and students. They are to be used strictly for the business of PTA as an association. Thus, they are not to be used to disseminate or advance personal viewpoints.** They are not to be released to other groups or used for any other purpose. Lists should not normally be shared with members or committee chairs, except as may be strictly necessary to conduct the business of PTA.

## past presidents of the New York State PTA

Fannie Barnes, New York ..... 1897-1898  
 Mary Mears, Albany ..... 1898-1905  
 Ina Merrell, Syracuse ..... 1905-1907  
 Lillian Whish, Albany ..... 1907-1911  
 Nellie Eldredge, Rochester ..... 1911-1913  
 Isabelle Holland, Buffalo ..... 1913-1917  
 Belle Saltford, Poughkeepsie... 1917-1920  
 Marie Holley, Lockport ..... 1920-1923  
 Caroline Hosmer, Auburn ..... 1923-1926  
 Carolyn Weaver, Buffalo ..... 1926-1928  
 Belle Saltford, (Acting President)  
 ..... 1928-1929  
 Lena Stevenson, Watertown .... 1929-1932  
 Dorothy Blake, Albion ..... 1932-1935  
 Elizabeth Brodie, Albion ..... 1935-1938  
 Mildred Brister, Auburn ..... 1938-1941  
 Doris Pratt, Williamsville ..... 1941-1944

Margaret Jenkins, West Hempstead  
 ..... 1944-1947  
 Helen Rowe Newell, Rochester  
 ..... 1947-1950  
 Mary Chapman, Lewiston ..... 1950-1953  
 Martha Fallon, Bronxville ..... 1953-1956  
 Jeanne Springer, Babylon ..... 1956-1959  
 Jane Cobb, West Sand Lake .... 1959-1962  
 Elizabeth Mallory, Endicott .... 1962-1965  
 Ruberta Foster, Pittsford ..... 1965-1968  
 Alice Willett, Syosset ..... 1968-1971  
 Helen Vandermosten, Oceanside  
 ..... 1971-1974  
 Edna Polin, Andes ..... 1974-1977  
 Eris Thompson, Indian Lake.... 1977-1980  
 Joan Ball, Spring Valley ..... 1980-1983  
 Marvin Fretwell, St. James ..... 1983-1986

Mary Ann Parker, New Hartford  
 ..... 1986-1988  
 Sheila Cohen, Freeport ..... 1988-1990  
 Helen Liebowitz, White Plains  
 ..... 1990-1993  
 Carol Buyakowski, Hopewell Junction  
 ..... 1993-1996  
 Carolyn Fiori, Massapequa ..... 1996-1999  
 Jane M. Bernhard, Poughkeepsie  
 ..... 1999-2002  
 Penny Leask, Rochester ..... 2002-2005  
 Maria DeWald, Clinton Corners  
 ..... 2005-2008  
 Susan Lipman, West Islip ..... 2008-2010  
 Maria Fletcher, Valley Stream.. 2010-2012  
 Lana Ajemian, Garden City ..... 2012-2014  
 Bonnie Russell, Syracuse..... 2014-2016

## going out with class

The health of the PTA depends upon recruiting new leaders and helping them move up the ladder of leadership. **The nominating committee is the most important committee in PTA.** Make sure it has been elected early and is given all materials necessary.

You, as president, do not sit on this committee, although you can offer confidential, written recommendations (as can all PTA members). Make sure that your members know who is nominated at least 30 days before the election. Then, make sure that the election is run according to the bylaws and practices cited in the Nominations and Elections found in **Section 7 of this Guide.**

As you prepare to conclude your term as president, prepare for the smooth transition of your successor. Remember how you felt as a beginner? Your successor may have different concerns and style of leadership, but needs your support to get off to a good start.

- Organize and transfer all PTA materials promptly. Throw out items that are no

longer relevant, useful or timely.

- Make sure that your successor has a current copy (electronic or printed) of this *Resource Guide* and that you review this section with him or her.
- Submit the Annual Officers' Contact Information (Form A) by submitting it electronically online or by mailing a printed form to your region director.
- Help all officers and chairs to follow your example in transferring materials. Plan a meeting with new and outgoing officers.

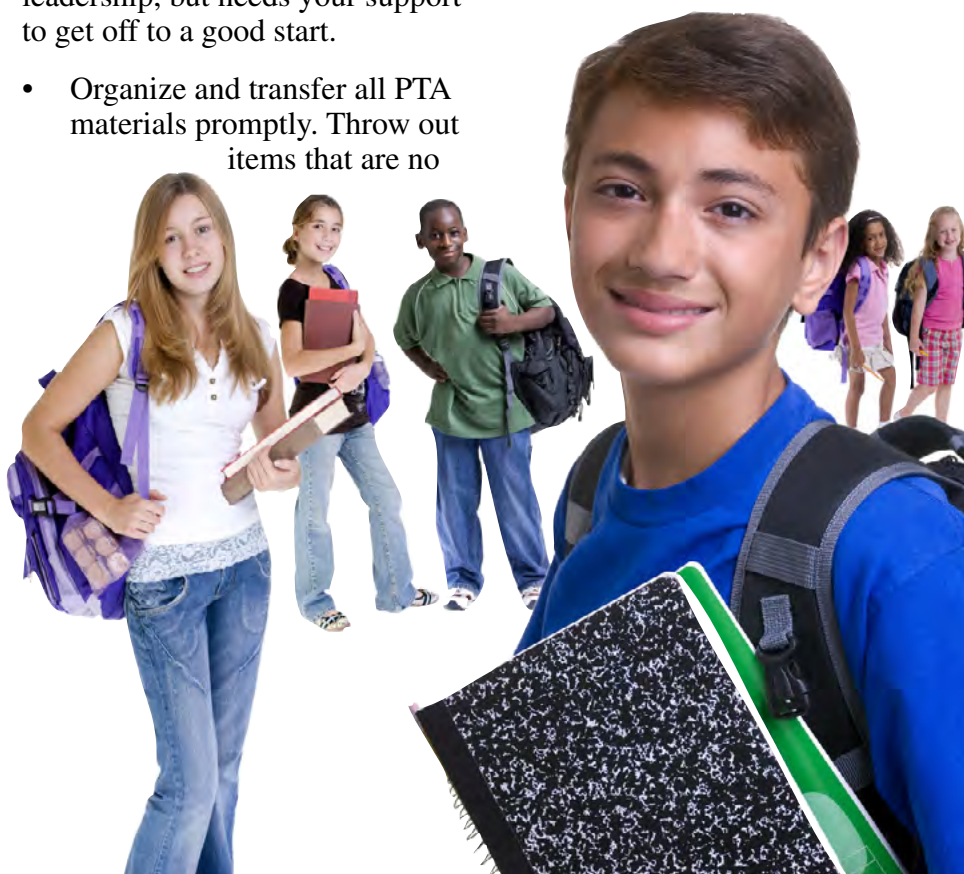
Once the new leaders begin, take a giant step back. Help when asked, but allow the new leaders to learn and flourish as you did.

Celebrate the successes of your unit or council. **Thank everyone for their contributions.** They will surely thank you for your hard work.

If you feel that you are able, you can continue to be active in PTA by working with your region PTA. Regions are constantly seeking talented and motivated PTA leaders who understand the association, and are interested in furthering its achievements outside their own community. Discuss available options for continued participation with your region director.

### outgoing president's checklist:

1. Prepare files for transfer – discard items not relevant or timely
2. Copies of bylaws, procedures, president's book
3. Flash drive containing important unit/council documents
4. List of phone contacts – school, region, state, etc
5. Copy of paid insurance bill
6. Update bank account signatures
7. Reminder of upcoming IRS 990 filing (after July 1 and before November 15)
8. Copy of Robert's Rules
9. Copy of President's section of *Resource Guide* – click [here](#) for a link to the entire *Resource Guide*
10. Submit annual unit/council update (Form A) – click [here](#) for access to online Form A
11. Plan a meeting for transfer of files for ALL new officers
12. Supply information to new officers for upcoming region officers training and encourage attendance
13. Thank everyone (think Advocate in Action award)



# Annual Officers' Contact Information (Form A)



You must complete this form **every year** to update your PTA Officers' contact information in order to receive access to the NYS PTA Unit Portal, your Insurance Certificate and future email communications from New York State and National PTA.

**You can complete this form online on the NYS PTA website [www.nyspta.org](http://www.nyspta.org) using the "ANNUAL Officers' Contact Information (FORM A)" button on the home page under Quick Links, or return this paper copy to your Region Director by June 15.**

Unit/ Council Code # \_\_\_ - \_\_\_ Unit/Council Name \_\_\_\_\_

School District \_\_\_\_\_

Did you file an IRS Form 990 for the fiscal year ending June 30, 2016 which was due no later than November 15, 2016?

- Yes, we filed a 990-EZ with Attachment A       No, we did not file an IRS 990 of any type  
 Yes, we filed a 990-N (ePostcard)       No, we filed an Extension       Not sure if the IRS 990 was filed

**\*Required Information**

**ENTER ONLY ONE PRESIDENT NAME. A CO-PRESIDENT CAN BE ADDED ON PAGE 2  
THE PRESIDENT WILL BE THE MAIN CONTACT FOR NYS PTA AND NATIONAL PTA CORRESPONDENCE**

\* Name of President \_\_\_\_\_

\*Home Address \_\_\_\_\_

\*City \_\_\_\_\_ \*NY (zip code) \_\_\_\_\_

\*Phone # (     ) \_\_\_\_\_ Mobile # for text reminders (     ) \_\_\_\_\_

\*Email \_\_\_\_\_

- \*  1<sup>st</sup> Year President       2<sup>nd</sup> Year President

**INSERT THE NAME AND ADDRESS OF THE TREASURER (REQUIRED)**

\*Name of Treasurer \_\_\_\_\_

\*Home Address \_\_\_\_\_

\*City \_\_\_\_\_ \*NY (zip code) \_\_\_\_\_

\*Phone # (     ) \_\_\_\_\_ Mobile # for text reminders (     ) \_\_\_\_\_

\*Email \_\_\_\_\_

**INSERT THE NAME AND ADDRESS OF THE SECRETARY (REQUIRED)**

\*Name of Secretary \_\_\_\_\_

\*Home Address \_\_\_\_\_

\*City \_\_\_\_\_ \* NY (zip code) \_\_\_\_\_

\*Phone # (     ) \_\_\_\_\_ Mobile # for text reminders (     ) \_\_\_\_\_

\*Email \_\_\_\_\_



# Annual Officers' Contact Information (Form A)

**INSERT THE NAME AND ADDRESS OF THE CO-PRESIDENT OR PRESIDENT-ELECT (IF ANY)**

Co-President       President-Elect

Name of Co-President or President-Elect \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ NY (zip code) \_\_\_\_\_

Phone # (      ) \_\_\_\_\_ Mobile # for text reminders (      ) \_\_\_\_\_

Email \_\_\_\_\_

**INSERT THE NAME AND ADDRESS OF THE VICE PRESIDENT (IF ANY) - ADDITIONAL VICE PRESIDENTS CAN BE ADDED ONLINE LATER USING THE "ADD OPTIONAL OFFICER" BUTTON ON THE UNIT PORTAL**

Name of Vice-President \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ NY (zip code) \_\_\_\_\_

Phone # (      ) \_\_\_\_\_ Mobile # for text reminders (      ) \_\_\_\_\_

Email \_\_\_\_\_

**INSERT THE NAME AND ADDRESS OF THE CORRESPONDING SECRETARY (IF ANY)**

Name of Corresponding Secretary (if any) \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ NY (zip code) \_\_\_\_\_

Phone # (      ) \_\_\_\_\_ Mobile # for text reminders (      ) \_\_\_\_\_

Email \_\_\_\_\_

**INSERT THE NAME AND ADDRESS OF THE MEMBERSHIP CHAIR (IF KNOWN) - MEMBERSHIP CHAIRS CAN BE ADDED ONLINE LATER USING THE "ADD MEMBERSHIP CHAIR" BUTTON ON THE UNIT PORTAL**

Name of Membership Chair (if any) \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ NY (zip code) \_\_\_\_\_

Phone # (      ) \_\_\_\_\_ Mobile # for text reminders (      ) \_\_\_\_\_

Email \_\_\_\_\_

