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 ongoing process of learning), and knowledge about yourself (your strengths, abilities, interests, talents and even weaknesses). Authority alone is not enough to command 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.

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.

- 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.

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

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.

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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. 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 account 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

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

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.