



# The Greatest Secretary in PTA




Presented By:

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Coordinator



Step right up for a fun, energizing workshop designed to empower Recording and Corresponding Secretaries with the skills, confidence, and mindset to manage the “circus” of a busy PTA. From juggling meeting minutes to taming the chaos of communication, we’ll explore the tools and tricks of the trade to keep your unit running like a well-rehearsed show

 all while having fun and staying energized!



# PTA MISSION STATEMENT

PTA is  
A powerful voice for all children,  
A relevant resource for families and  
communities, and  
A strong advocate for the education and well-  
being of every child

*everychild.onevoice.*



# Act I - Recording Secretary Master of Minutes



**President's Right (& Left) Hand** The importance of the recording secretary



**Circus Program** Learn how to organize agendas and keep meetings on track



**Rule Keeper** Understand your role under NYS PTA bylaws and unit procedures



**Recording Minutes** Master minute-taking: what to include, what to leave out



**Secretary Bag of Tricks** What to bring to the meeting



**Tools of the Trade** Handle corrections, approvals, and storing records properly



# PRESIDENT'S RIGHT (& LEFT) HAND

- The duties of the secretary are second only to the duties of the president.
- The president is the head of the organization, and the secretary is his or her right hand.
- The secretary retains all rights of membership: making motions, debating, and voting.
- Article VIII - Duties of Officers Section 3 and Section 4
- Additional duties or details may be included in your procedures.





# RULE KEEPER



Understand your role under NYS PTA bylaws and unit procedures

**Quorum to start a meeting** - What can proceed without quorum or while waiting for quorum

- Informational Reports, Committee chairs reports, principal updates, past or ongoing projects
- Guest Speakers or Presentations
- Open Discussion / Q&A
- Announcements

# SECRETARY BAG OF TRICKS

## What to bring to the meeting

- Copy of the association's current state-approved bylaws and the procedures
- List of members



- Agenda
- Minutes of the previous year, including the treasurer's reports
- List of all committees, their chairmen and members



# CIRCUS PROGRAM

## The Agenda is Your Safety Net

- Helps guide the meeting
- Prepares you to take clean notes
  - Keeps the meeting on track
- Created by the President and/or Recording Secretary





# Sample Agenda

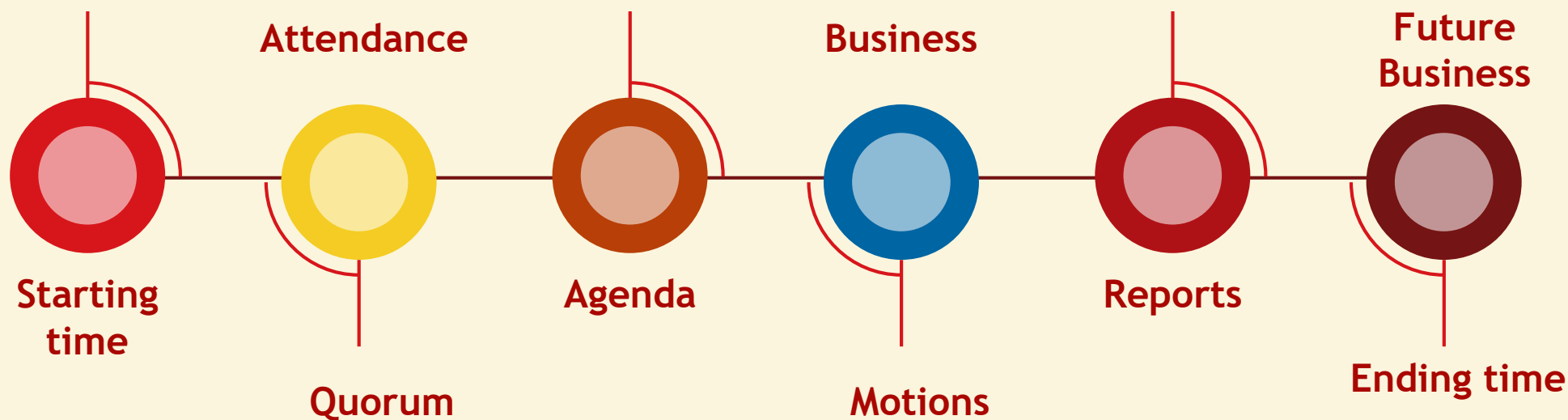
## PTA Unit Meeting Agenda

- 1) Call to Order
- 2) Confirm quorum - Note start time
- 3) Pledge of Allegiance (if applicable)
- 4) Welcome & Introductions
- 5) Approval of Minutes - Review & approve previous meeting's minutes
- 6) Treasurer's Report - Financial overview - Motion to file
- 7) President's Report
- 8) Principal's Report (if applicable)
- 9) Committee Reports - Membership, Fundraising, Events, etc.
- 10) Old Business - Updates on previous action items
- 11) New Business - Motions, approvals, or elections
- 12) Announcements
- 13) Adjournment - Motion to adjourn - Note end time



# The Master of Minutes

Master minute-taking: what to include, what to leave out



## What NOT to Include

- ⊘ Opinions or interpretations
- ⊘ Word-for-word dialogue
- ⊘ Informal banter
- ⊘ Personal observations



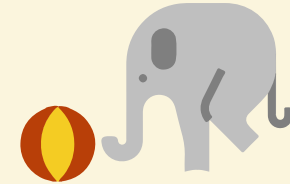
# TOOLS OF THE TRADE



Correcting  
minutes



Approval of  
minutes



Written, typed  
& audio/video  
recording of  
minutes



Storing records properly



Templates



Cloud storage  
& access



# Act II - Corresponding Secretary Ringmaster of Communication



The Voice of the Big Top



The Social Media Showstopper



The Barker of  
Announcements & Reminders



The Marketing Magician



The Mail & Message Maven



The File-Organizing Strongwoman



# THE VOICE OF THE BIG TOP

You're center stage as the voice of your PTA! You create and manage all communications—including letters, notes, messages and posts - as directed by the president, executive committee or board. Whether reading correspondence at meetings or writing a heartfelt thank-you, your words carry weight and keep relationships strong.





# THE BARKER OF ANNOUNCEMENTS & REMINDERS



“Ladies and Gentlemen, the meeting starts at 7!”  
From executive committee meetings to PTA events, you help keep everyone in the loop and on time by sending clear, timely notices and follow-ups.

- Preparing and sending notices for all PTA meetings (per bylaws) with attachments
  - Schedule reminders 1 week and 1 day before events
  - Use attention-grabbing subject lines and emojis when appropriate
  - Creating engaging, concise reminders for events and deadlines
- Communication via email, givebacks, social media, flyers, or school platforms

# THE MAIL & MESSAGE MAVEN

You're the backstage manager handling the PTA mailbox and inbox! Whether it's a question about a fundraiser, a thank-you from a vendor, a district update, or a PTA award deadline, you keep it sorted and flowing to the right people.

Monitoring incoming mail emails and messages

Monitor social media posts and messages

Routing correspondence to the appropriate officer or chair



Responding in a timely fashion, typically within 24 hours

Responding on behalf of the PTA as needed

Share relevant info



# THE SOCIAL MEDIA SHOWSTOPPER

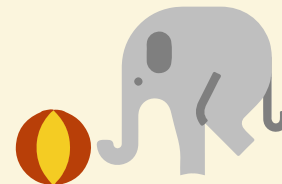
You're the spotlight operator, giving your PTA a public face! Your role is to promote, inform, and celebrate via Facebook, Instagram, X or your PTA website - all while protecting privacy and following school guidelines.



Sharing meeting and event reminders



Creating event promos, highlights, and photo posts



Sharing PTA posts from National, NYS and region



Recognizing volunteers, staff, and students



Highlighting PTA events and activities



- Celebrating community partners and sponsors












# The Marketing Magician Promoting Your PTA Like a Pro



You're the illusionist who makes the magic of your PTA visible to everyone! As the Marketing Magician, you use your words, graphics, and strategic outreach to spotlight your PTA's value and draw people in—from new families to community partners. Your role goes beyond sending emails—it's about crafting a public image that excites, informs, and inspires. You help shape how your PTA is seen and remembered.

-  Create flyers, blurbs, and posts to promote PTA events, programs and initiatives
-  Create newsletters or updates for families
-  Publicizing accomplishments, partnerships, and opportunities
-  Working closely with the president, membership, chairs and the school to increase engagement
-  Highlight what your PTA does for the students, staff, school and community
-  Use email subject lines that spark curiosity
-  Keep a folder of ready-to-use templates, branding and marketing language

# THE FILE-ORGANIZING STRONGWOMAN

Your act might not be flashy, but it's critical to keeping the show running!  
Maintaining neat, accessible files ensures transparency, historical reference, brand consistency, and smooth transitions.

- Save/file all outgoing and incoming mail and communications
  - Maintain digital or physical records (files, fliers...) by date and topic/event
  - Maintain templates for meeting notices, letters, outside communications, etc.
- Include appreciation messages and thank-yous in your records for historical reference
  - Backup digital files monthly



# RESOURCES

## 1. Recording Secretary Cheat Sheet

- Minute-taking checklist
- Do's and Don'ts reference

## 2. Secretary Survival Toolkit

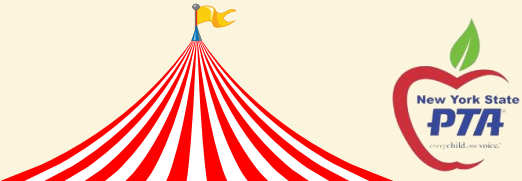
- Top 10 PTA Email Tips

[canva.com](https://www.canva.com)

[ChatGPT](https://chatgpt.com)

<https://gemini.google.com/>

 Now that your circus is organized — go out and lead your PTA center ring with pride!



# Secretary Cheat Sheet

## ✓ Minute-Taking Checklist

Use this at every meeting to capture key info:

- Date, time, and location of the meeting
- Type of meeting (Executive Board, General Membership, etc.)
- Names of officers present/absent
- Approval of previous meeting's minutes (noted as "approved" or "approved with corrections")
- Treasurer's Report summary
- Summaries of reports given (committee chairs, principal, etc.)
- Motions made (exact wording), name of mover and seconder
- Results of votes (approved, failed, tabled)
- Announcements and upcoming dates
- Adjournment time

## 🔗 Do's and Don'ts of Recording Minutes

### ✓ Do:

- Use **clear, concise language**
- Stick to **facts**, not opinions
- Record all **motions verbatim**
- Be **objective and neutral**
- Save, date, and **secure minutes properly**

### ✗ Don't:

- Don't include personal opinions or commentary
- Don't write word-for-word dialogue
- Don't skip sections or reports—even if “no report”
- Don't delay typing and distributing minutes
- Don't forget to have them approved and signed





# TOP 10 PTA EMAIL TIPS

Because even the best circus runs on clear communication!

- Use Clear Subject Lines: Let readers know exactly what the email is about (ex. PTA Meeting Reminder)
  - Get to the Point Quickly: Everyone's busy! Key message in the first 1-2 lines.
- Use Bullet Points for Clarity: Lists make emails easy to skim. Perfect for dates, volunteer roles, or to-do's.
- One Main Topic per Email (if possible): Multiple topics = messages get lost. Separate emails = better focus.
- Use a Professional, Friendly Tone: Be approachable but respectful—remember you're representing your PTA.
- Always Include Details: Who, What, When, Where, and How -Especially for events, meetings, or volunteer asks.
- Include Contact Info or Reply Instructions: Please contact Jane at janePTA@gmail.com if you have questions.
  - Avoid All Caps and Excessive Punctuation: It can come off as yelling (even if you're excited).
    - Proofread Before Sending: Double-check names, times, dates, and spelling.
  - Use a Consistent Signature: Include your PTA name at the bottom of every email.



**Bonus Tip:** If you're unsure how it sounds, send it to yourself first or have another PTA member take a quick peek.



# Thank You for Joining Us!

**NYS PTA President: Patty Frazier - Measuring Our Mission for Every Child**



Thank you for attending today's workshop!  
Your time, ideas, and energy help us move closer to fulfilling our mission:

“To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.”

Secretary,

You're not just behind the curtain—you're helping build the tent, sell the tickets, and pack the stands! With the right message, timing, and a sprinkle of creativity, you'll help make your PTA the greatest show in town.

Please scan the QR code to share your feedback and help us measure how we're meeting our mission.



**Scan the QR Code to take the  
SLC Workshop Evaluation**

**Any questions please contact:**

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