



Your First Tasks Step by Step

As a new PTA president, you should immediately:

- Contact your state PTA; let them know who you are and give them a list of your officers, including contact information for each person.
- Talk with the outgoing president and officers about the PTA's status and seek their recommendations for the coming year. Thank them for their work.
- Introduce yourself to the school staff, including your principal. Offer to work collaboratively this year.
- Review the procedure book. If you did not receive a procedure book from the outgoing president, or if you want to be sure yours is complete, use the checklist below.
- Make sure that a proper audit of your PTA's books is conducted at the end of the outgoing officers' terms and that IRS reports are filed when due.
- Change the signers on the PTA's bank accounts.



Procedure Book Checklist

The procedure book should contain a record of work done and other helpful materials. It usually is compiled by officers during their terms and passed on to allow officers and committee chairs to build upon past successes. A procedure book should include the following:

- A copy of the local, state, and national PTA bylaws
- A copy of the budget
- Standing rules
- Programs for the year
- Materials from workshops or conventions
- List of officers' and chairs' addresses, telephone numbers, and e-mail addresses
- Special information relating to offices or chairs, including current work plans

Getting Your Year Started

- Updated job descriptions
- A list of other files and resources kept by your PTA and their locations
- Correspondence and files from past years. Check legal requirements for keeping certain files. Minutes must be kept permanently, and financial records should be kept for seven years.
- Agendas, minutes, and reports
- A list of resource people and organizations and their contact information
- A file or scrapbook of newsletters, newspaper articles, business cards, etc.

Your PTA Board of Directors



Basic Board Responsibilities

Your board of directors is your core team. An effective board makes your role easier and ensures that your PTA will meet its goals for the year. In addition to the president, your PTA should have a vice president, a secretary, and a treasurer as part of its board. You also may have committee chairs on your board for membership, advocacy and legislation, and other roles as set in your bylaws.

Make sure each board member's role matches her or his interests and abilities.



Board Success Checklist

Boards succeed when:

- An orientation or kickoff meeting is held inviting all board members.
- Board members have a good understanding of their specific roles and how to work together. Put it in writing for them and include job descriptions.
- There is planned rotation. Boards grow stronger when they consistently recruit new members and leaders. Hint: Establish all positions with clear beginning and ending dates.
- Established standing committees set goals and develop and implement an action plan that benefits the association.
- A process for self-evaluation is in place. The board conducts an annual evaluation of all goals and actions taken by the association.
- Boards should establish a plan of work for each activity or program including budgeting.
- Meaningful two-way communication between all involved parties; the president and the board, the PTA and the school as well as the PTA and its members.



Vice President

The vice president may be called upon at any time to assume temporarily the place of the president; therefore, he or she should study the president's duties and responsibilities and be familiar with the work of the PTA. In the event of the president's resignation, the vice president assumes all duties until the president's position is filled in accordance with the bylaws.

The vice president is responsible for:

- Performing specific duties as provided for in the bylaws,
- Assuming responsibility for duties designated by the president, and
- Representing the president in her/his absence or upon request.



Secretary

The secretary is responsible for keeping an accurate record of the proceedings of association meetings. These records are the history of the PTA. Promptness, accuracy, and knowledge of PTA policies are key to this job. The secretary should be committed to helping the president conduct a businesslike meeting.

The secretary is responsible for:

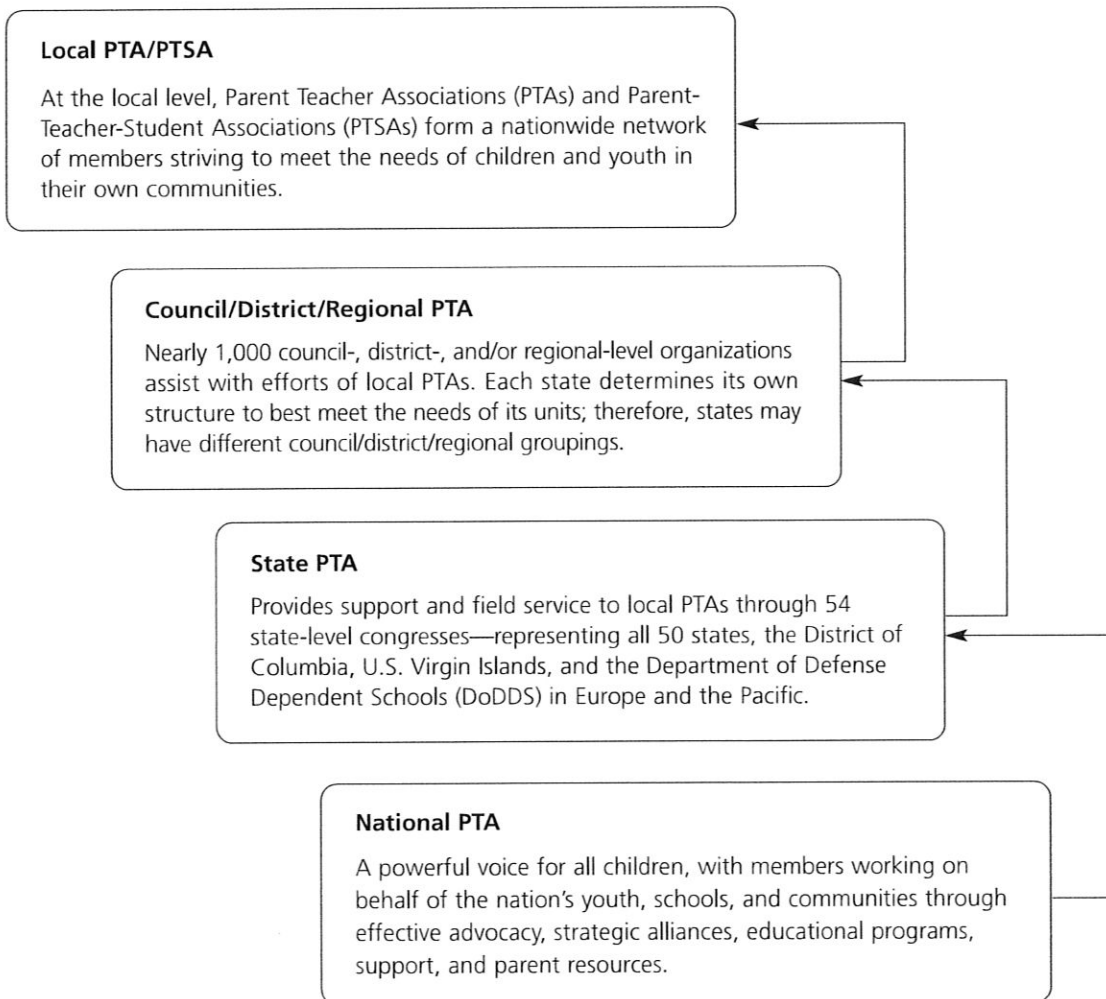
- Recording minutes of PTA meetings, with special attention given to motions (recorded exactly as stated) and action taken,
- Keeping secure official, permanent PTA records, including all originals of approved minutes, and
- Maintaining a copy of current bylaws, standing rules, and a membership list.

PTA Organization



Overview

The PTA local unit is connected to its state PTA and to the PTA national organization, forming a nationwide network of members working on behalf of all children and youth.





Frequently Asked Questions about Dues

Where do the dues go?

Locally, they go toward projects that the membership decides to do. In addition, they support the creation of resources and advocacy efforts at the state and national levels.

The Value of Membership

PTA

- e-newsletters
 - PTA Parent
 - PTA Partners in Leadership
 - PTA Local Leader News
 - PTA Takes Action Update
- PTA Takes Action
 - action alerts
 - advocacy network
 - PTA Public Policy Agenda
- Member benefits
 - PTA.org
 - parent & leader resources
 - bulletin boards
 - news
 - PTA blog
 - multimedia library
 - PTA Great Idea Bank
- OMDRplus membership management tool
 - free online database
 - e-mail
 - membership cards
- National training
 - Emerging Minority Leaders Conference
 - National convention
- National programs
 - Reflections
 - PTA MORE
 - Three for Me
 - PTA Teacher Appreciation Week
 - Urban Family Engagement
 - PTA Take Your Family to School Week (\$1897 Awards)
 - PTA Movie Night Live!
 - National Standards
 - PTA Healthy Lifestyles (Awards)
 - Let's Fight Flu Together!
 - PTA Goes to Work
- National awards
 - PTA Family Expo!
 - Training Capacity Building Initiative (Wiki)
 - State & Local Training
 - PTA Outstanding Advocacy Award
 - Shirley Igo Advocate of the Year Award
 - Phoebe Apperson Hearst Family-School Partnership Awards
 - Mary Lou Anderson Reflections Arts Enhancement Grants
- Official PTA Kit
 - Quick-Reference Guides
 - Leaders Guide
 - marketing and membership materials
 - special offers from national partners
 - The Power of Partnerships
- e-learning courses
 - social networking
 - PTA YouTube Channel
 - PTA Facebook fan page
 - @PTAanditor on Twitter
 - PTA photos on Flickr