

Welcome PTA Leaders to PTA Board Retreat: Leadership Workshop

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Durham Council of PTAs
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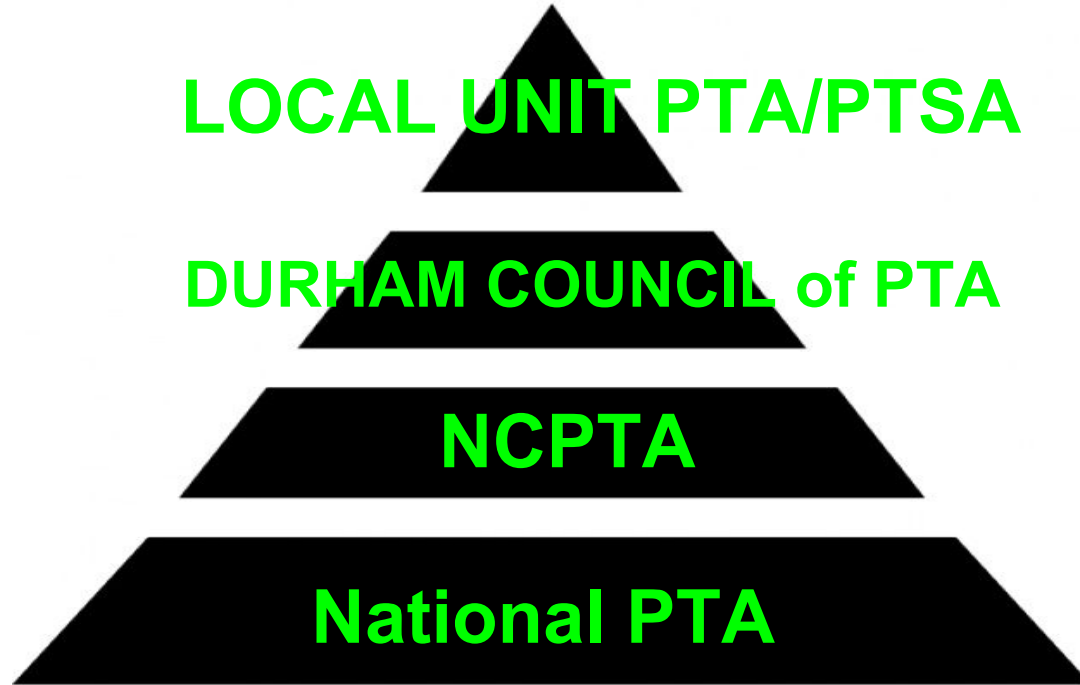
We're Glad You're Here!

- Who are we?
- Who are you?
- 3 Hours
- In-depth Leadership Training
- Questions & Answers

During this retreat we will...

- Work in small groups
- Network with other PTA Presidents
- Give ample time for questions

PTA PYRAMID



PTA

Vision and Mission

Vision of PTA

Making every child's potential a reality

PTA Mission

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

Historical Purposes of PTA

- ❖ To promote the welfare of children and youth in home, school, community and place of worship
- ❖ To raise the standards of home life
- ❖ To secure adequate laws for the care and protection of children and youth
- ❖ To bring into closer relation the home and the school, so that parents and teachers may cooperate intelligently in the education of children and youth
- ❖ To develop united efforts between educators and the general public that will secure for all children and youth the highest advantages in physical, mental, social and spiritual education

Questions

and

Answers



PTA/PTSA President's Role

1. Lead the PTA
2. Oversee financial and legal obligations
3. Preside over meetings
4. Represent the PTA
5. Communicate
6. Foster partnerships, relationships

Lead your PTA/PTSA with your Leadership Team

Board of Directors

- Consists of elected officers, up to 3 at-large members, 1 teacher rep, and school principal
- Sets PTA goals, calendar, appoints committee chairs
- Check bylaws
- May approve new committees and members
- Board members support the majority decisions

Financial Obligations

- Ask for treasurer's report at each meeting.
- Review financial reports- statements and budget
- Bring any amendments to budget over \$300 to membership

Legal Obligations

- Make sure your PTA has insurance.
- Ensure audit is completed – committee is preferred
- Ensure 990 is filed at correct time
- Sign all contracts once approved by membership.
- Co-sign checks. **NEVER SIGN A BLANK CHECK.**

Preside over Meetings

Prepare, prepare, prepare

- Agendas are a MUST – adopt
- President is chair.....not the boss
- Welcome Everyone
- Know your bylaws and check Roberts' Rules!
- Always say “thank you”



Represent Your PTA/PTSA

- Meetings with principal
- School ceremonies
- Board meetings
- Contacts with elected officials
- Attending trainings and conventions held by Council, State and National PTA

Communicate with Everyone!



Many types of
communications

Use different forms
to reach the entire
school community

PTA Branding

- We want to deliver a consistent, clear and uniform presence for all PTA-produced materials. When used properly, the National PTA logo and tagline help unify all PTAs and create awareness of the PTA brand. Applied consistently, these guidelines will create distinctive, credible and sustainable messaging for all supporting PTA units, resulting in the organization working as one association with one voice.
- **Style** also protects the integrity of our brand. Poor grammar, misspellings and inconsistencies reflect poorly on an association. An association that advocates for children, particularly their education, should be a strong proponent of consistent style.
- **PTA Logo Usage** should be used on all printed materials as well as any document

Group Activity #1

What communication tools do you use to reach your members and community?

Partner with Administrators, Teachers, Community

Principal - should be a working team

respect confidentiality

always share meeting preparations

Teachers - seek input, share common goals

Community - joint projects, grants

Foster Relationships with

- All School Staff
- School Board
- Superintendent
- Durham Council PTA
- NCPTA
- Elected Officials

Questions

and

Answers



Planning Your PTA Year



Local Unit in Good Standing

What is a unit in good standing?

All information is required by your bylaws and by law and must be on file in the state office

- Dues
- Contact information for all officers with EIN
- Bylaws
- Audit
- Copy of IRS Form 990

Bylaws

- Be familiar!
- Rights of your membership
- Adopted by membership
- Have available at all PTA meetings and activities
- **THEY ARE NOT SUGGESTIONS!**

Standing Rules

- Not as restrictive as bylaws
- Details for administration of bylaws
- Cannot conflict with bylaws
- Can help avoid conflict
- More info at ncpta.org

Transition Steps

1. Meet with outgoing leaders.
2. Review records, materials, procedure book
3. Arrange meetings with contacts, partners
4. Introduce new leadership to members
5. Change contact information, signature cards

Work with your Board

Gather input from your stakeholders

List types of activities to consider

Develop a calendar for activities. Objectives?

Assign committee responsibilities

Create a plan to raise funds to support activities

Bring the plan and budget to membership

Programs and Projects

- What programs has your PTA done and what new ones did you develop?
- Will they be inviting to your membership?
- Will they reflect the Purposes of PTA?

Group Activity #2

Identify and discuss 3 programs or projects your PTA/PTSA has developed.

Fundraising to Reach Goals

- Do not raise funds until you have goals
- 3-1 Rule
- Always set a *Membership Goal*

Group Activity #3

Identify and discuss 3 opportunities for non-dues revenue your PTA has or will try.

Strategies for Membership

- It's not just the membership chair's job!
- Set a goal
- Brainstorm for ways to encourage members
- Communicate what your PTA does
- Reach out to all people who support children

Group Activity #4

Identify and discuss 3 ways your unit recruits and retains members.

Volunteers – the Heart of PTA

- Have a Volunteer Committee Chair?
- Write down all volunteer opportunities
- Invite members to volunteer a few hours
- Have sign-up sheets at open house, PTA meetings, events
- Recognize and celebrate their work
- Enter a volunteer in Volunteer of the Year & “Bright Star”

Awards for your PTA/PTSA

For your PTA/PTSA

- Membership
- Volunteer of the Year
- Nurse of the Year
- Teacher of the Year

For your students

- Reflections
- Student Service Award
- Citizenship Essay
- Scholarships

Recognition for your Members

- NCPTA awards

- Distinguished Service Award
- Diversity and Inclusion Award
- Gwin G. Hughes Healthy Living Award
- And many more, check out....

<http://ncpta.org/index.php/awards/annual-ncpta-awards/>

- National PTA award

- National PTA Life Achievement Award

Schools of Excellence

- Enroll April 1 – October 15
- Conduct Family-School Partnership Scan.
- Receive custom *Roadmap to Excellence*
- Complete application by June 1
- Visit www.pta.org/excellence for more details and f



Conclusion

By applying what we've discussed and learned here,
your unit will have a successful year!

Increased Membership & Volunteers

Successful & Empowered Leadership

Meaningful Programs and Activities

Effective Meetings & Financial Oversight

Questions

and

Answers



Questions?

Your
PTA/PTSA

NCPTA

Contact:



Durham
Council PTA

National PTA

We're all here to assist you

Durham Council of PTAs Board of Directors

Francelia Burwell - President

Rosa Rangel - VP of Programs

Danielle Bonner - VP of Community Engagement

Charlene Reiss - Treasurer

Nicole Martin - Secretary

At-Large Members

Crystal Rogers

Sunny Hiraldo

Rhea Franks

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Resources

- Durham Council of PTAs
- NCPTA ncpta.org
- National PTA pta.org
- President's Quick Reference Guide
- Back to School Kit
- E-learning Courses

Follow Up: Contact Us!



Thank You

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