NC PTA
Leadership Training

2013
PTA Vision

Making every child’s potential a reality
PTA Mission and Values

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

Collaboration
Commitment
Accountability
Respect
Inclusivity
Integrity
NCPTA Mission Statement

“NCPTA is North Carolina’s oldest and largest volunteer organization advocating for the education, health, safety, and success of all children and youth while building strong families and communities.”
PTA’s National Standards for Family-School Partnerships

- Welcoming all families into the school community
- Communicating effectively
- Supporting student success
- Speaking up for every child
- Sharing power
- Collaborating with community
Responsibilities of a Leader

- Listen
- Participate
- Allow Others to Participate
- Be Enthusiastic
- Develop a Team Spirit
- Be Positive
- Be a Problem Solver
- Treat All People Fairly
- Reward Efforts
Volunteers lead the association and therefore...

- there is no payment for service either monetary or in kind
- there is fiscal responsibility
- there is confidentiality and professionalism
- there are expectations and accountability
Legal and Ethical Issues Facing PTA’s

One of the most important functions of the PTA leaders and members is to keep the resources and efforts focused on the mission.

“Ethics is not about the way things are… It is about the way they ought to be”
Ethics – A definition

A system of moral principles or values; the rules or standards governing conduct.

Ethical Behavior

- Decision Making
- Modeling
- Working Knowledge
- Effort for the Association
- Leading
- Commitment and Dedication
- Expectations and Responsibilities
- Accountability
- Conflict Resolution

4 Ethics Challenges

1. Knowing what’s right
2. Doing what’s right
3. Managing competing rights
4. Everything counts
Leading to Ethics – 10 Strategies

1. Build Values and Ethics Awareness
2. Hold People Accountable
3. Lead by Example
4. Use Values To Drive Decisions
5. Ensure In-Sync Policies and Practices
6. Provide Values and Ethics Education
7. Pay attention to perceptions
8. Focus on Steady, Incremental Change
9. Engage and Promote Ethical People
10. Encourage Initiative
Ten Basic Responsibilities of Nonprofit Boards

1. Follow the organization’s mission and purposes
2. Elect the president
3. Support the president
4. Ensure effective planning
5. Ensure adequate resources
6. Manage resources effectively
7. Determine, monitor, and strengthen the organization's programs and services
8. Enhance the PTA’s public image
9. Ensure legal and ethical behavior and maintain accountability
10. Recruit and orient new board members and assess board performance
Legal Responsibilities

**Duties of Obedience**
To exercise power for the benefit of the association and all of its members with full honesty and reasonable efficiency

**Duties of Care**
To exercise the greatest care, skill and judgment
To act out of good faith and deal fairly with the association

**Duties of Loyalty**
To display the highest loyalty, reasonable care and business prudence in regard to the interests of the association
Diversity and Inclusion

- Diversity is the relative uniqueness of each individual.
- Inclusion is to be accorded the same services and opportunities as everyone else.
- Ask: Do you really want this? How committed are you?
- Is your PTA reflective of your community? Does your PTA allow “ALL” in?
Exactly what is diversity?

- Diversity is each of us and all of us, individually and collectively.
- Diversity is everything that makes us different and everything that makes us alike.
- Diversity is what we can see and what we cannot see in each of us and all of us, at anytime, anywhere.
- Diversity is NOT limited to skin color, gender, nationality or socioeconomic status.
Diversity, continued....

- Give respect, understanding, and dignity to all people
- Embrace changes that facilitate full participation
  - Become acquainted with the leaders of the many diverse groups in the community and collaborate with them to increase parent, family and community involvement
- Actively reach out to people who are traditionally excluded or marginalized
- Foster a sense of belonging
- Honor the intrinsic value of each person
How can your PTA become more inclusive?

- Offer the same opportunities for people
  - Openly assess beliefs and practices to assure inclusiveness and guard against discrimination;
- Welcome everyone
- Build community
  - Make every effort to create a PTA board and membership that is inclusive and reflective of its community
- Emphasize cooperation
- Seek to understand and accommodate differences
  - Foster programs and practices that eliminate bias, prejudice and misunderstanding within their communities
- Provide a safe and socially comfortable environment for all
Types of PTA Leadership

- **Section 6.1 Officers.** The only elected officers of this local PTA shall be a president, one or more vice president(s), a secretary, and a treasurer. No PTA member shall serve in more than one elected position at a time. Upon taking office, each elected officer must be a member of this local PTA. This local PTA shall enter the newly elected officers and their contact information into the NCPTA database immediately after their election. Changes in officers and/or their contact information must be updated in the NCPTA database.

- **Board of Directors: Section 7.3 Composition.** The board of directors shall consist of the elected officers of this local PTA, the chairs of the standing committees, the school principal, one teacher elected by the board, and up to three at-large members elected by the board.

- **Section 8.1 Standing Committees.** The board of directors shall establish an audit committee by July 1 each year, and an advocacy and nominating committee by November 1, and may establish additional standing committees at any time as needed.
The following is applicable to all PTA officers and committee chairs:

In working with others, officers/chairs should

1. recognize the importance of cooperation in achieving parent-teacher goals

2. seek and utilize the interests and abilities of fellow members

3. delegate and share responsibility, supervise and give assistance whenever necessary
Continued…

4. help to establish good working relationships among the members, and promote cooperative relationships between the PTA and other groups with similar interests

5. recognize the importance of sharing ideas, and encourage full and free discussion before decisions are made

6. appreciate and respect the opinions of other people
Leadership at Meetings

Conducting meetings:

- Call the meeting to order at the designated time and if a quorum is present, proceed with the business.
- Follow a written agenda.
- Have a working knowledge of parliamentary procedure:
- Maintain a fair and impartial position at all times and encourage members to participate.
Meetings continued

- Take no part in any discussion while presiding, refrain from expressing a personal opinion on questions before the assembly, and avoid personal bias when giving information to the association.
Meetings…

- When it is necessary for a president to express an opinion, the vice president should assume the chair while the president speaks from the floor.

- Stand to preside and follow the accepted order of business. Decide all parliamentary questions. The president may appoint a parliamentarian to assist in deciding procedure, but the chair always rules.
Meetings continued

- State each motion clearly, after it has been seconded, before allowing discussion.
- State the result of every vote taken.
- Instruct the secretary to be sure the vote is recorded in the minutes.
Parliamentary Procedures

“A set of rules for conducting organized meetings. Following these procedures lets PTAs accomplish its goals fairly while protecting all the members rights. With practice parliamentary procedures helps PTA members make tough decisions together and remain friends in the process.”
Good Standing Requirements

A local PTA unit must comply with the following NCPTA requirements in order to maintain its charter and 501(c)(3) tax-exempt status:

- Comply with the provisions of NCPTA’s Uniform Local Unit Bylaws.
- Collect and submit membership dues to the NCPTA office by the 15th of each month. Membership dues must be submitted before additional membership cards can be requested and distributed by NCPTA.
- Enter local PTA members’ names and email addresses into the NCPTA database by the 15th of each month.
- File an annual form 990 as required by the IRS. The 990 deadline for organizations with a fiscal year end of June 30 is November 15.
- Submit online annual financial review by August 31.
- Obtain signatures from each board member reflecting agreement to a board approved code of ethics form and conflicts of interest form.
- Operate in accordance with policies and positions of National PTA and North Carolina PTA.
Failure to follow any of these requirements will render the local PTA unit out of compliance. Local units may be referred to NCPTA for any appropriate actions due to noncompliance. NCPTA is committed to helping all local units meet these requirements. Should a local unit become inactive, a $125 reinstatement fee will be assessed at the time of reinstatement.

ALL board members are responsible for making sure your PTA is in good standing and for being good stewards of your membership’s money.
Duties of the Secretary

Bylaws - Section 6.9 Secretary. The secretary shall record the minutes of all meetings of the general membership and the board of directors and shall perform such other delegated duties as may be assigned by the board of directors, and shall maintain a file of important documents related to that local PTA, including but not limited to:

- articles of incorporation of this local PTA;
- the current uniform local bylaws approved by NCPTA and adopted by this local PTA,
- the current standing rules of this local PTA, if standing rules have been adopted by the board;
- minutes of past meetings of the general membership and board of directors;
Secretary, continued….

- a copy of the official membership roster provided for in Section 5.3 of these bylaws;
- a current roster of board members;
- a current roster of all committee members and chairs;
- legal documents, including but not limited to insurance policies and contracts;
- current and past tax returns; and
- current and past audit reports;

At the end of his/her term, the secretary shall transfer this file of important documents to his/her successor as secretary.
Board member Responsibilities

Board Members should approach their responsibilities with common sense and through constant and careful monitoring of the Organization’s goals, policies, and strategic plan.

- Every Child’s Potential a Reality
- Bylaws, compliance policies as a nonprofit
- Advocacy Priorities
"Advocacy is a constitutional right and a proud American tradition. It’s the most important opportunity, after voting, that Americans have to be involved in their government."

Excerpted from NCPTA Advocacy Guide
How do you become an advocate?

1. Join and become active in your local NCPTA unit or council.
2. Inform yourself about educational issues of interest.
3. With your local NC PTA leaders, make a plan and GET STARTED!
NCPTA Advocacy Priorities

To support NC PTA’s Mission and policies, the following “Advocacy Priorities” will guide the work of NCPTA during the 2010-2011 school year:

- Adequate School Funding
- Teachers and Administrators
- Parent Involvement
- Accountability – Schools That Work
- Health and Wellness
Tools You Need to Become an Advocate

- Be Fearless
- Be Helpful
- Be Informed
- Be Civil
- Be Persistent
- Always Say Thank You
Making the connection..

- To principal
- To teachers
- To all building level staff
- To policy makers
- To business community
- To faith community
- To other nonprofits
- To secondary education
- To all caregivers in your community
- To media
The best connection

THE KIDS
Leadership Resources
Provided By PTA

www.pta.org

www.ncpta.org
“I am PTA”........ “We are PTA”

- You demonstrate the value of PTA
- You stand for the heritage as well as the future
- You offer dignity and respect to the work
- You provide a legacy of leadership
- You are the voice and set the example for children
In conclusion

Good PTA Leaders know the why, how, and the importance of our organization.

Our message is as relevant today as it was 115 years ago when PTA was founded.

I hope you have found this presentation useful in helping you to grow and develop as a PTA leader.