Keys to Success

- PTA Mission and Values
- Leadership Responsibilities
- Plan Your Year
- Lots of Membership Input
- A Dedicated Passionate Team
- A Whole Lot of Transparency
PTA Mission

PTA's mission is to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.
PTA Values

- **Collaboration:** We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.

- **Commitment:** We are dedicated to children’s educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.

- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association’s goals.

- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association’s strategic initiatives.

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National Standards for Family-School Partnerships

PTA.org/excellence

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Duties of the President: Uniform Bylaws Section 6.7

- Preside at all meetings of the general membership and board of directors
- Shall coordinate the work of the officers, board and committees
- Shall perform other duties as assigned by the board of directors
- Shall sign all contracts
- Shall be a voting member of all committees except nominating (can not serve on audit committee either)
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
Key to Success: Plan Your Year

- Last year doesn’t matter!
  - Different needs
  - Different strengths, gifts and talents
  - Different membership
  - Different board

It’s all about the process
Lots of Membership Input

- PTA Officers and Principal
- PTA Committees (Standing and Special)
- What are your school goals and how can you help the school reach those goals?
- School Improvement Plan
- Strengths and Talents
- School Year Needs
- Be sure to be inclusive of all families at your school
  - Is your PTA and your Board of Directors reflective of the makeup of your school?

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A Dedicated, Passionate Team

- Use Strengths
- Use Passions
- Use Talents
- Use Connections
- Use Your Entire Membership
- Use All Available Resources

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A Whole Lot of Transparency

- Members know why their membership is important!
  - Prepare your “elevator speech”
- Members know the process
- Members know what PTA does
  - “This event brought to you by the PTA”
  - Tell them what PTA pays for
  - Sell the story of your PTA
  - Share your success! Tell Council or NCPTA, apply for awards
- Members know how to give input
  - Begins with Nominating Committee and proper elections
  - Membership knows how to get involved in committee work
Key to Success: Knowing Your Responsibilities

- Must Do
- Can Do

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Must Do

- Properly elect your new board of directors
- Annual Financial Review
- Set meeting schedule
- Meet with your administration
- Create a budget
- Approve budget at first General Membership meeting
- Advocate
- REMAIN IN GOOD STANDING

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Officer Elections

- Held in the spring (usually at last general membership meeting of the year)
- Nominating committee presents slate of officers 10 days prior to meeting; nominations from the floor allowed
- All nominees must be PTA members
- Take office July 1
- See bylaws - Section 7.1
- Board consists of...
  - Officers
  - Chairs of Standing Committees
    - Audit, Advocacy, Nominating required
    - Others according to BOD’s needs
  - School Principal
  - One Teacher
  - Up to 3 At-Large Members
Annual Financial Review

- See Uniform Bylaws - Section 11.3
- Be sure your audit committee completes by August 31
  - Total income
  - Total expenditures
  - Budget comparison (actual/budget)
  - Assets and Liabilities
  - Enter in MemberHub/NCPTA database

President can not serve on audit committee
Set Meeting Schedule and Conduct Efficient Meetings

- For the year- give everyone on board notice
- Consistent
  - Same day/time
- With input
- Distribute widely

Efficient Meetings

Follow a written agenda

Call the meeting to order at the designated time

Be sure you have quorum (majority of board) to conduct business & declare a quorum in the minutes

Follow Robert’s Rules of Order (motions, seconds, etc); state each motion clearly, after it has been seconded, before allowing discussion

Be sure to instruct your secretary to record all votes in the minutes

Board meetings are not for planning- that should be done in committees
Meet with Administration

- Early
- Regularly
  - Set a schedule for the year
- “The Principal and the PTA” document
  - Talk to your principal about methods of communication (ie, text, email, phone calls)
  - Discuss goals for school and PTA and how they intersect
Budget

- Determine needs
- Determine resources
- Should reflect your priorities
- Review last year’s budget and see where changes, adjustments can be made
- When determining number of fundraisers, always create your programming first, then decide how to fund the programs (3 to 1 rule)
- Approved at first general membership meeting
Advocate

PTA is primarily an advocacy organization: “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.” – from NCPTA Advocacy Guide

Determine priorities

NCPTA Advocacy Priorities:
- School Funding
- Teachers and Administrators
- Parental Involvement
- Accountability
- Health and Wellness

Educate your parents on issues

Advocacy chair is required on your board- sign up for our hub

Elected Officials Go To School Program
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 no later than October 15, and for dues received after that date, by the 15th of each month. The dues for members who join online through MemberHub are routed to your local unit bank account, and then to NCPTA once approved by two authorized check signers in MemberHub.
  - Enter local PTA members’ names and email addresses into MemberHub by the 15th of each month for members that pay by check or cash. Members that join online are automatically entered into MemberHub.
  - By August 31, confirm in MemberHub that your PTA’s Annual Financial Review has been completed and the results reported to your PTA’s Board of Directors.
  - File an annual Form 990 as required by the IRS and confirm filing date in MemberHub. The 990 deadline for organizations with a fiscal year end of June 30 is November 15.
  - Adopt a code of ethics for Board members and obtain signatures from each board member reflecting agreement to a board approved conflicts of interest form.
  - Operate in accordance with policies and positions of National PTA and North Carolina PTA.
Can Do

- Board Orientation/Retreat
- Strategic planning
- Provide board with leadership development opportunities
- Social time with your board
- Breakfast/Lunch with the administration
- Healthy school environments
- Apply for grants
- Staff appreciation
- Volunteer appreciation
- Provide quality programs & family engagement opportunities for your school and families
  - Cultural Nights
  - Literacy Nights
  - STEM Nights

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Can do: Apply for Grants

Why?

▶ To reduce fundraising “asks”
▶ To engage another organization and new people
▶ To achieve more than you could on your own
▶ Grants may help you divert normal funding to other areas that help every child reach their potential
How to Apply for Grants

- What do funders look for?
  - A compelling story
    - Who are we?
    - What is our mission?
    - What is our history?
    - What is the big picture? Who are we? Where do we want to go?
  - A good reason to fund an organization
  - A clear need
  - Alignment with their mission, goals, and objectives
  - Ability to evaluate and report outcomes
  - Ability to claim results

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Assessing and Describing Your Needs

- **School information:**
  - Enrollment
  - Location
  - FRL%
  - Make-up of student body
  - Academic status

- **Local, state, or national information:**
  - Data
  - Policies

- **Assessments**
  - School of Excellence
  - School health

**Carefully select data to create a compelling story**

*Don’t include: filler, anything unrelated, words or concepts you don’t understand*

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Successful Grant Applications

- Read all the instructions and the entire application!
- Abide by word limits.
- Answer all questions.
- Does the project or program work for the grant?
- Be honest.
- Submit ahead of due date.
- Is there a webinar?
  - Attend it!
- Has someone else read your application?
  - Double check it!
- Does your school support the application?
  - Paperwork, contracts, etc.
- Submit reports on time!

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Finding Grants

- School gardens (Whole Foods)
- School running programs
- Action for Healthy Kids
- Lowes Toolbox for Education
- National PTA
- NCPTA
- Community Foundations
- Music (Gibson, Fender, Sony)

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Leading Effectively and Efficiently

- Continuous Leadership Development
- Keep drama to a minimum
- Plan strategically
- Take care of yourself
- Be positive
- Thank others often
- Enjoy what you do

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Continuous Leadership Development

- NCPTA
  - Website ([www.ncpta.org](http://www.ncpta.org))
  - Annual NCPTA Convention (May 17-18, 2019, Charlotte)
  - LifeLine for Leaders (second Mondays of the month)
  - NCPTA Staff and Board of Directors
Continuous Leadership Development

- National PTA
  - Website (pta.org)
  - PTA Back to School Kit: www.ptakit.org
  - On-line training
  - Follow on social media for Facebook Live events and Twitter chats
  - Annual Convention (June 2019, Columbus, Ohio) and Legislative Conference (March 2019, Washington D.C.)
  - Take Action Network (www.pta.org/advocacy)
    - #STOPCutsToClassrooms
Keep Drama to a Minimum

- You don’t have to have the last word
- You don’t have to prove you are right
- Vent to a trusted person - ON THE PHONE!
- It is your job to keep things positive and productive
- Write and discard what you really want to say
Take Care of Yourself

1. Sleep, exercise and eat well
2. Set aside working hours and family time
3. Take a break when needed
4. Delegate if someone else can do it
5. Have fun!
Be Positive

- People don’t want to be around negativity
- Volunteers want to feel good about giving
- People will stop coming if they leave frustrated and tense all the time
- Positivity is contagious, spread it!
- You will feel better too

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Thank Others Often

- For everything
- When you don’t feel like it
- When no one thanks you
- When you are tired

Eventually it becomes the culture!
Enjoy What You are Doing

- List three personal goals for yourself
- Why are you doing this?
  - Keep the PTA Mission in mind
  - Don’t be distracted by adult drama- keep the kids in the forefront
- Keep a journal of the things that energize you
  - Do more of them
  - Delegate the things that don’t energize you
  - Is it “filling your bucket?” If not, don’t do it.

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All About Process

- Bylaws
- Standing Rules
- Best Practices: Contact the Council- that’s what they are there for!
- Running Meetings Procedurally
  - Make it about the organization and not personalities

PTA. Every child, one voice.
Contact Us for Questions, Concerns, Support

Follow us on Facebook (North Carolina PTA) and Twitter (@PTA4AllKids)

www.ncpta.org

Contact the state office at office@ncpta.org

Contact your local Council

PTA. Every child, one voice.
You are all superheroes.
Thank you for your service to PTA!!

Have a fantastic year!

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