

# Planning for Your New PTA Year/Officer Transition



Lifeline for  
Leaders

June 1, 2020 – 7:30 p.m.

# Our Vision



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

# Objectives

- Completing your year
- Planning for the new year
- Officer transition

# Finishing Your Year Strong

- April 2020 Uniform Bylaws Amendments
- Nominations
- Elections
- Annual Financial Review
- Electing the new Board of Directors for next year.
- Letting Go

# Steps to lead the PTA way:

- **View your work through the lens of the [Four I's of Transformative Family Engagement](#):** Inclusive, Integrated, Individualized & Impactful.
- **Welcome all families, school staff and community members** in a way that values their unique strengths, abilities and interests. PTA create inclusive environments by embracing and valuing diverse perspectives and building intentional, authentic relationships.
- **Communicate effectively** by listening and deeply understanding the perspectives of their community's families, teachers, administrators and students; by offering an individualized experience by communicating frequently and through a variety of methods, including personalized outreach; and by using feedback to create programs tailored to families interests and needs.
- **Focus on student success** by planning PTA programs that are integrated connected and aligned with the broader education system to support student achievement and well-being.

- **Identify and advocate for specific school improvements.** PTA leaders serve as a resource for parents, helping them navigate the school and community and speak up for their students' unique needs. Create a lasting impact, by providing opportunities for families to develop knowledge and skills that will enhance their children's educational experiences.
- **Create a board that works like a team** - Sharing power and growing the volunteer pool with different perspectives; resolving conflicts in a positive, productive way; showing children by example how teamwork can make their world a better place.
- **Collaborate** with outside organizations or companies and provide a critical link between families, the school and the community. PTA leaders are the champions of school community and pride.

# Approved Amendments

- On April 20, 2020, the NCPTA Board of Directors **unanimously approved amendments** to the Local Unit and Council Uniform PTA Bylaws to address the international COVID-19 pandemic. The amendments clearly state ways for the membership to meet while circumstances such as a pandemic prevents your general membership from physically meeting.
- The NCPTA Board of Directors has also developed a [Virtual Meeting Policy](#) to guide you through conducting meeting by electronic media and also guidelines for the elections of officers.

# Nominations

- Form committee in Fall
  - (if you have not done that, you can start today)
- Committee nominates officers only
- Send slate to president
- President gives notice to membership at least ten (10) days prior to election notice. The notice will include the nominating committee's slate of nominees.
- See [www.ncpta.org](http://www.ncpta.org) for the Nominations Toolkit

# Elections

- Held in the spring
  - Last general membership meeting
- General membership meeting
- Nominations from the floor allowed
- All nominees must be PTA members (as of the meeting)
- Take office July 1

# Annual Financial Review

- See Bylaws – Section 6.10
- Prepare report by June 30<sup>th</sup>
  - Total income
  - Total expenditures
  - Budget comparison (actual/budget)
  - Assets and Liabilities
- Submit to incoming president, treasurer, audit committee
- Confirm date of review in MemberHub by August 31<sup>st</sup>.
- Lastly, don't forget to submit documents to audit committee by July 1<sup>st</sup>.

# Board of Director Elections

- See Bylaws – Section 7.1
- Board consists of...
  - Officers
  - Chairs of Standing Committees
    - Audit, Advocacy, and Nominating Committees are required
    - Others according to BOD's needs
  - School Principal
  - One (1) Teacher
  - Up to Three (3) At-Large Members

# Letting Go

Let the New Leaders Lead - It may look different, and that's ok!!!

**GOOD TRANSITIONS = GREAT STARTS!**

**The smooth transition of outgoing and incoming board members and officers is of vital importance and can determine your PTA's leadership success for years to come. ~ California PTA**



We Pass the Baton

# What are Your Responsibilities?

Keys for a smooth transition:

- Finish the term
- Complete all responsibilities (including updating your procedure book.)
- Meet with current board to evaluate the term.
- Send new board contact information to your council or district.
- Meet with successor; introduce successor to key individuals.
- Turn over all PTA materials and resources to your successor.
- Incoming and outgoing boards meet together.

# 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 of the new year
- Advocate

# Going the Extra Mile

- Breakfast/Lunch with the administration
- Provide quality family engagement opportunities
- Healthy school environments
- Staff appreciation
- Volunteer appreciation
- Make it fun, personal and meaningful

# Leading Effectively and Efficiently

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

# Continuous Leadership Development

- NCPTA
  - Website
  - Annual NCPTA Convention
  - Leadership and Webinars
  - NCPTA Staff and Board of Directors

# Continuous Leadership Development

- National PTA
  - [Membership tool-Kit](#)
  - Local Leader PTA Kit
    - <http://www.ptakit.org/>
  - Website
    - [www.pta.org](http://www.pta.org)
  - On-line training
    - <https://www.pta.org/home/run-your-pta/elearning>
  - Action Alerts
    - <https://www.pta.org/home/advocacy/take-action/sign-up-for-alerts>



# Plan Strategically

- Use your leadership team's goals
  - You don't have to recreate
- Utilize your administration skills
  - Don't take advantage
- Each committee
  - List three things that you want to accomplish
    - SMART
  - List steps to accomplish



# Take Care of Yourself

1. Get your sleep
2. Exercise
3. Make time to eat well
4. Set aside working hours and family time
5. Take a break when needed
6. Delegate if someone else can do it
7. Have fun and personal growth

# 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

# Enjoy What You are Doing

- List three personal goals for yourself
- Why are you doing this?
- Keep a journal of the things that energize you
  - Do more of them
  - Delegate the things that don't energize you

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