Objectives

- Understand the role of local PTA officers
- Learn about the difference between Standing and Special committees
- Understand the role of Standing Committees
Mission

The overall purpose of PTA is to make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.
PTA Structure

National

State

Council

Local
PTA Governance Structure

- Defines the organizational structure
- Roles and responsibilities of individuals
- Responsibilities of committees
- Operating procedure
PTA Governance Structure

- **Bylaws:** Legally required documents
- **Board of Directors:** Represent member
- **Committees:** Work on specific projects
Role of Officers

President, Vice President(s), Secretary and Treasurer are the elected officers that are part of the Board of Directors.
Board of Directors

- Your local PTA Board of Directors represents the members and works to fulfill the PTA mission and meet the PTA’s goals.

- The Board of Directors is defined in your local bylaws.

- It includes your elected officers as well as the following:
  - Chair of standing committees
  - A student representatives
  - Principal of the school or his/her representative
  - A community member, especially if it is a community PTA
Board of Directors

The Board of Directors is responsible for:

- Representing the members
- Running the organization in accordance with the bylaws and standing rules
- The direction of the PTA
- Meeting all legal and fiscal requirements
- Ensuring that the programs and activities adhere to the PTA mission

Source: PTA Board Basics v2.2
Board of Directors

As the governing body, board members have specific legal responsibilities:

- Duty of Care
- Duty of Loyalty
- Duty of Obedience
Duty of Care

Requires that board members be reasonably informed about what the PTA does and that they participate, ask questions, use good business judgment and act in good faith.
Duty of Loyalty

Requires that board members act in the best interest of the whole association, not for the benefit of themselves, their family or their friends. They should not share confidential information or put themselves or another organization before the local PTA if there is a conflict.
Duty of Obedience

Requires that board members comply with all local, state and federal laws. They must comply with the PTA mission and purpose, and obey the bylaws.
Committees

Committees are groups that are created to work on a specific project such as:

- Fundraising
- Teacher Appreciation Week
- Advocacy
- Membership
- Backpack Buddies
Committees

There are two types of committees

1. Standing Committees - year-long
2. Special Committees - specific events
Officer and Board of Directors Job Descriptions

Section 7.3 Composition. The Board of Directors shall consist of:

1) Elected officers of this local PTA
2) Chairs of the standing committees
3) School principal
4) Teacher elected by the board
5) Up to three at-large members elected by the board
Officer and Board of Directors Job Descriptions

The only elected officers of a local PTA unit are:

1) President
2) One or more vice presidents
3) Secretary
4) Treasurer
Role of Officers

- Only one person should be elected to serve in any one office.
- Officers may meet, but no decisions and/or business can take place without the other members of the PTA Board of Directors.
- There are no co-officers, assistant officers or officer-elects.
- Upon taking office, each elected officer must be a dues paid member.

Source: Uniform Local Bylaws Article 6
President

- Shall preside at all meetings of the general membership and the board of directors
- Shall coordinate the work of the officers, the board and the committees of this local PTA
- Shall perform duties as provided by these bylaws or assigned by this local PTA or by the board of directors
- Shall sign all contracts of this local PTA that have been approved by the board
- Shall be an ex officio voting member of all committees except the nominating committee
Vice President(s)

Performs duties requested by the president and the board of directors. In the event that the president’s office is vacant, the vice president, or the vice presidents acting together, if there is more than one, shall assume the duties of the president until a new president is elected.
Secretary

- Record minutes of all general membership and board of director’s meetings.
- Perform other delegated duties as may be assigned by the board of directors.
Secretary Cont.

Shall maintain a file of important documents related to that local PTA, including but not limited to:

• Articles of incorporation of this local PTA
• Current uniform local bylaws approved by NCPTA and adopted by this local PTA
• 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
• Copy of the official membership roster provided for in Section 5.3 of these bylaws
• Current roster of board members
• Current roster of all committee members and chairs
• Legal documents, including but not limited to insurance policies and contracts
• Current and past tax returns
• Current and past audit reports
Treasurer

The Treasurer shall:

- Collect, deposit and maintain all funds of this local PTA in approved depositories (including, but not limited to, all monies collected as local dues, raised in PTA activities, received as contributions, or otherwise acquired).
- Disburse funds in accordance with the annual budget adopted by this local PTA, and maintain records identifying the purpose and payee of all disbursements.
- Maintain a current record of income, expenditures, assets and liabilities of this local PTA, and make all financial records available for inspection and review by the audit committee.
The Treasurer shall:

• Present a financial reports of income and expenses
• Remit dues to NCPTA in accordance with Article 5 of these bylaws and the current NCPTA good standing requirements
• Prepare a year-end financial report by June 30 showing the total income and expenditures for the fiscal year, comparing those figures with the budget approved at the beginning of the fiscal year, and the assets and liabilities of the local PTA, and submit that report to the incoming president, treasurer and audit committee
Treasurer Cont.

The Treasurer shall:

• File all required tax forms and reports in a timely manner, including but not limited to tax returns for the previous fiscal year, and submit copies of all such filings to the secretary of this local PTA

• At the end of his/her term, transfer all financial records to the audit committee by July 1; and provide assistance to the audit committee upon request
Standing Committees

- Advocacy
- Audit
- Budget & Finance
- Membership
- Nominating
Advocacy

- Develops and organizes meetings, activities and programs to further the goals and purposes of PTAs.

- Improves communication and relationship between school staff and families

- Educates families and caregivers on important issues related to the health and education success of their children

- Helps to make each child’s potential a reality
Audit

Consists of no fewer than three members

Responsible for the audits and financial reviews described in Article 11 of the bylaws
Budget & Finance

Works with the Treasurer to make sure the association is in good financial health, in good standing with the IRS and other government authorities.

Protects assets and makes sure its resources are used appropriately.

Committee should include volunteers who have expertise in financial reporting and experience with grant writing and fundraising.
Membership

- Develops and deploys year-round membership recruitment and retention plans
- Coaches other PTA leaders in how to talk about PTA and membership with others
- Coordinates membership at events
- Collects and tracks membership forms and dues in partnership with the Treasurer
- Distributes membership cards
- Provides membership reports to the officers
Nominating

- Comprised of an odd number of no fewer than 3 members
- At least two of the committee members shall be board members
- At least one committee member shall be a member of the local PTA who does not serve on the board
- Throughout the year, identifies talented, motivated and responsible individuals to serve as officers
- Presents the slate of nominee for officers for the local PTA for the coming year
Who Can Help

Some parents may take the first step in seeking a leadership role in your organization. For others, you may need to initiate the relationship by recruiting them into partnering with you once you have identified individuals who demonstrate qualities that set them apart as potential parent leaders.
I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.

Maya Angelou
Election

Only those individuals who are PTA members and who have signified their consent to serve if elected may be nominated by the nominating committee or by floor nomination or elected to such office.
You were just elected to your new role of President, Vice President, Secretary or Treasurer. Before you get started, you should:

- Learn what work has been done in the past
- Share what has been done in the past
- Identify what work needs to be done
- Outline your PTA’s background, contributions from others, successes and failures
- Create a list of the first five things you will do in your new role
Resources

Resources on pta.org:

- Local PTA Leader Kit
- Back-to-School for PTA for Leaders
- Becoming an Amazing PTA Leader
- Local PTA President Roles and Responsibilities
- Local PTA Secretary Roles and Responsibilities
- Local PTA Treasurer Roles and Responsibilities
- Local PTA Board Basics - Structure, Roles and Responsibilities
- Leaders templates and tools
Resources Cont.

Resources from NC PTA:

- Contact NCPTA for bylaws
- ncpta.org for recordings of Lifeline for Leaders