Planning for Your New PTA Year/Officer Transition

North Carolina PTA

Lifeline for Leaders

June 15, 2021 – 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.

North Carolina PTA

everychild. one voice.
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 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 30th
  – 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 31st.
• Lastly, don’t forget to submit documents to audit committee by July 1st.
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
  – Website
    • [www.pta.org](http://www.pta.org)
  – On-line training
    • [https://www.pta.org/home/run-your-pta/elearning](https://www.pta.org/home/run-your-pta/elearning)
  – Action Alerts
    • [https://www.pta.org/home/advocacy/take-action/sign-up-for-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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everychild.onevoice.