Leader of the Pack
1st Year Presidents
Starting Your Leadership Journey
Congratulations!

You have been elected PTA President

Knowledge is Key – Training, Training, Training

Use Your Resources!

- CT PTA Office – office@ctpta.org
- CT PTA Local Leaders FB page
- CT PTA and National PTA websites
The Leader of the Team

Leaders are not born – they are developed through learning and experience

Lead by example, motivation and inspirations and others will follow

Open up new avenues to the inexperienced

ALWAYS express thanks and recognition
The Leader of the Team

Do It — “This opportunity aligns with our Mission, and would fit nicely into our calendar of events.”

Delegate It — “This opportunity aligns with our Mission and would work well alongside another event we have planned. I give your contact info to the chairperson to discuss.”

Dump It — “Thanks for making that suggestion. Unfortunately, that program doesn’t align with the Mission of PTA. Please let me know if you have other ideas.”
President’s Duties

Preside at all meetings

Along with Executive Committee appoint chairmen and committee members, as outlined in your Bylaws

Coordinate work; approve all materials prior to distribution

Sign all contracts

Be familiar with financial procedures

Be an authorized check signor

The President’s job is not to DO all the work, but to EMPOWER the Board and Chairpeople to do the work.
President’s Duties

Serve as the official representative of the association at PTA council meetings if applicable

Be responsible for ensuring the completion of all SOA items

Be the official contact for your unit

Meet with the site administrator regularly (Principal, Superintendent)

Perform other duties assigned by the association via your bylaws/procedures manual
Standards Of Affiliation (SOA)

The Standards of Affiliation are the minimum annual requirements that a local PTA must complete in order to maintain Good Standing.
# Connecticut PTA Standards of Affiliation 2020-2021

To maintain proper legal and liability status, all PTAs are required to be in "good standing" with the Connecticut PTA. A benefit of affiliation with PTA is a central location for all your important legal and organizational documents. As a part of our service to you and your members, the following information will be kept in your file at the CT PTA office.

## Connecticut Parent Teacher Association - 540 Washington Avenue, North Haven, CT 06473

- **Office**: 203-691-9585  
- **Fax**: 203-891-6462  
- **Website**: www.ctpta.org

<table>
<thead>
<tr>
<th>Item</th>
<th>Format</th>
<th>Due to CT PTA Office</th>
<th>Rationale</th>
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<tbody>
<tr>
<td><strong>Officer Information Sheet</strong>&lt;br&gt;(Follow link to report officers) or submit via MemberHub.</td>
<td>Electronic <a href="http://www.ctpta.org">www.ctpta.org</a></td>
<td>July 1st&lt;br&gt;Immediately after election of officers but no later than July 1st.</td>
<td>This is required to allow State &amp; National PTA to communicate with each PTA and the leadership team responsible. Officers’ information is required yearly even if there are no changes to officers.</td>
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<tr>
<td><strong>Membership Fees</strong>&lt;br&gt;Mail with Unit Treasurer's report form to CT PTA or via MemberHub.</td>
<td>Officers immediately, then fees are submitted monthly when you have new members to report to CT PTA.&lt;br&gt;Please note: A minimum of 25 paid PTA members for all PTAs and a minimum of 10 paid PTA members for all SEPTAs must be reported and paid to CT PTA by October 15th which includes all officers' membership.</td>
<td>Fees provide Connecticut and National PTA with the resources to assist affiliates and advocate for children. Officers need to be paid PTA members immediately to conduct PTA business. Treasurers should submit fees monthly when there are new members to report. All PTAs must have paid members reported by October 15th and then again, every month moving forward as you attract new members.</td>
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<tr>
<td><strong>Review of Financial Records</strong>&lt;br&gt;Electronic, mail or fax to CT PTA or submit via MemberHub.</td>
<td>All PTAs must complete a review of the previous year’s financials.</td>
<td>Required for bonding insurance and is a good practice to ensure your financial process is sound. Please note: Insurance fidelity bond coverage requires that monthly bank reconciliation must be reviewed and signed by someone who does not have authorization to sign checks. (Financial software does not qualify under insurance requirements.)</td>
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<tr>
<td><strong>Copy of IRS Form 990 or IRS letter for extension granted</strong>&lt;br&gt;If using AIM insurance as your provider, no proof is necessary. All others PTAs must send proof of insurance to CT PTA or file in MemberHub.</td>
<td>Electronic, mail or fax to CT PTA or submit via MemberHub.</td>
<td>October 31st.&lt;br&gt;All PTAs are required by the IRS to complete form 990 to maintain non-profit status. Fiscal year ending 6/30 due to the IRS by Nov 15th to avoid filing penalties. Make 3 copies - one for each IRS, CT PTA and your PTA files.</td>
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<tr>
<td><strong>Proof of Insurance</strong>&lt;br&gt;Electronic, mail or fax to CT PTA or submit via MemberHub.</td>
<td>This date is for PTAs who do not use AIM insurance. Send proof of insurance to CT PTA via email to <a href="mailto:office@ctpta.org">office@ctpta.org</a></td>
<td>Insurance is needed to protect your officer against lawsuits, guard your treasury for loss or theft and provide liability coverage for your events. Applications and renewals will be sent to PTA Presidents in August/September.</td>
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<td><strong>Bylaws</strong>&lt;br&gt;After reviewed by CT PTA, then approved by PTA Membership, forward a copy to CT PTA by email, mail or fax or submit via MemberHub.</td>
<td>Bylaws must be reviewed every three not to exceed 5 years.&lt;br&gt;Contact CT PTA to receive the most current Model Bylaws.</td>
<td>Bylaws are your PTAs basic governing document. Bylaws should be reviewed on a regular basis to ensure accuracy. If an update is needed, the requirement is to conduct a review and have your General Membership approve. Prior to the General Membership vote, proposed Bylaws should be sent to Connecticut PTA office for review. Please send to <a href="mailto:office@ctpta.org">office@ctpta.org</a>.</td>
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<tr>
<td><strong>Training for officers</strong>&lt;br&gt;Required for all Presidents/Treasurers Suggested for all Officers</td>
<td>Leaders are required to participate in leadership training that has been provided or approved by Connecticut PTA.</td>
<td>Every year before Oct. 15th or within 60 days of taking office.</td>
<td>Training allows for the dissemination of the most current regulations, trends and standards in PTA and parent engagement. We provide Leadership Training yearly which you are encouraged to attend. Training may also occur at council or local level. CT PTA offers webinars throughout the year. Council-based training must be approved by Connecticut PTA.</td>
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Representing PTA

Remember that you represent PTA wherever you go – Be mindful of your behavior

Be careful that you always represent the PTA accurately, fairly and with dignity

When making decisions, always do so, with the PTA Mission in mind

Help your unit members to be knowledgeable about PTA positions

Share the Bylaws, Basic Policies, and the Information you receive from CT PTA that is for ALL members
As President, it is critical that you are familiar with your Bylaws and Policy/Procedures Manual (if applicable)

Your BYLAWS will provide you with the following information:

Unit Name, Unit Code XX-____, ID numbers

Purposes and Basic Policies of PTA

Relationship with National and CT PTA
Bylaws Rule

Membership Types and Dues information

Officer positions and their duties

Nominations and Elections process

What the executive committee is, what the executive board is, how often you must meet

Defines frequency of General Membership meetings

Standing Committees

Defines your Fiscal Year
Fiduciary Responsibilities

Have 2 names on signature cards at bank and all PTA checks should have 2 signatures - never make checks out to cash or pre-sign any PTA checks.

Use vouchers and remittance forms.

Have 2 people count & verify ALL money.

Review bank statement monthly (This is critical for insurance purposes).

Use membership funds to benefit ALL.

Ensure that a monthly financial report is completed at every meeting – put this on your agenda and note it in your minutes.
Calendar Planning

July/August – Prepare budget and programs, meet with Principal

September – Back to School night, membership recruitment, executive board meeting with presentation of budget to executive board

October – General Membership Meeting, approve yearly budget, File Form 990 and send copy to CT PTA

November – Family Engagement Event

December – Volunteer Appreciation Event
Calendar Planning

January – Elect nominating committee according to bylaws

February – Participate in advocacy activities; celebrate CT PTA Founders Day (2/17)

March – Plan for Teacher/Staff appreciation, review proposed school district budget

April – General Membership meeting – officer elections,

May – Submit Officer Information Sheet to CT PTA
When developing your meeting agenda, consider the following things:

- Review prior meetings minutes – also look at the minutes of the meeting from last year to see what occurred
- Review calendar for upcoming events
- Check in with other officers for agenda items
- Refer to “Meeting Tips” worksheet (This is available at www.ctpta.org- Officer/Forms. This is password protected: **Password: lead2020**
Running the Meeting

Plan ahead

Have an agenda

Start and end the meeting on time

Include time limits for each discussion item

Establish a quorum and vote on all action items

Use parliamentary procedure

Preserve order to be fair, impartial and respectful

Remember that you act as facilitator as the meeting chair

A good meeting is everyone’s responsibility
Working with your Principal

President and Principal – work as a team
- Meet consistently: discuss issues, review events, keep each other informed
- Work out problems or misunderstandings: be honest and direct
- Invite Principal to PTA board meetings

PTA and Principal
- Plan membership meetings at different times to meet the needs of all parents
- Present PTA concerns and issues to principal and develop a forum for open discussion
PTA Resources

National PTA
www.pta.org
Facebook

State PTA
www.ctpta.org
Facebook

Council PTA
Local Leaders Group
Facebook

Connecticut PTA
everychild.onevoice
YOU ARE A PTA PRESIDENT!!

Enjoy your term of office
Plan time for yourself and your family
HAVE A SENSE OF HUMOR
HAVE A GREAT YEAR!!!