Leaders of the Pack
Presidents, Treasurers & Secretaries Training
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
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
Do It — “This opportunity aligns with our Mission, and would fit nicely into our calendar or 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.”

Decline 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 signer

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.
The Standards of Affiliation are the minimum annual requirements that a local PTA must complete in order to maintain Good Standing.
# Standards of Affiliation 2021-2022

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@ctpta.org / www.ctpta.org / 203-691-9555 (office) 203-691-6462 (fax)

<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></td>
<td>Electronic <a href="http://www.ctpta.org">www.ctpta.org</a> (follow link to report officers)</td>
<td>July 1st Immediately after election of officers but no later than July 1st. This is required to allow State &amp; National PTA to communicate with each PTA and the leadership team responsible. Officer's information is required yearly even if there are no changes to officers.</td>
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<tr>
<td><strong>Membership Fees</strong></td>
<td>Mail with UTR form (Unit Treasurer's Report) Available on our website - PTA Officer forms. Also available from state office. This is a password protected page on our website; contact CT PTA to gain access.</td>
<td>Monthly - Officers immediately, then fees are submitted monthly when you have new members to report to CT PTA. Fees provide State and National PTA with the resources to assist affiliates and advocate for children. Officers need to be paid PTA members immediately to maintain 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></td>
<td>Electronic, mail or fax Sample review available from CT PTA if needed.</td>
<td>October 31st All PTAs must complete a review of the previous year's financials. 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></td>
<td>Electronic, mail or fax to CT PTA a copy of your IRS form 990.</td>
<td>October 31st All PTAs are mandated 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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<td><strong>Proof of Insurance</strong></td>
<td>If using AIM insurance as your provider, no proof is necessary. November 30th This date is for PTAs who do not use AIM Insurance. All PTAs who seek outside insurance (other than AIM), please send proof of Insurance to CT PTA via email to <a href="mailto:office@ctpta.org">office@ctpta.org</a> 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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<tr>
<td><strong>Bylaws</strong></td>
<td>Electronic, mail or fax to CT PTA Bylaws must be reviewed every three to not exceed 5 years. Contact CT PTA to receive the most current Model Bylaws. 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 Required for all Presidents/Treasurers Suggested for all Officers</strong></td>
<td>Leaders are required to participate in leadership training that has been provided or approved by Connecticut PTA. Every year before Oct. 15th or within 60 days of taking office. 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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Remember that you represent PTA wherever you go – Be mindful of your behavior in person, online, and with social media. Remember our commitment to our values in our code of conduct (list the values here)

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, Town, Fiscal Year
- Purposes and Principles of PTA
- Relationship with National and CT PTA
- Membership Types and Dues information
- Elected Officer positions and their duties
Nominations and Elections process

What the Executive Committee is, what the Board of Directors is, how often you must meet & quorum

Defines frequency of General Membership meetings and Quorum

CT PTA Annual Meeting

Standing Committees

Defines your Fiscal Year

Parliamentary Authority and Amendments or Revisions for Bylaws

Conflict of Interest, Whistle Blower Policy, Code of Conduct
FIDUCIARY RESPONSIBILITIES

Have 2 names on signature cards at bank
Never make checks out to cash or pre-sign any PTA checks

Use check requests (follow bylaws for when two signatures are needed on the request) and remittance forms

Have 2 people count & verify ALL money

Have someone review bank statement monthly - someone other than the signers on the account (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
July/August – Prepare programs; meet with Principal; File form 990 before October 31.

September – Back to School night; membership recruitment; Executive Board meeting; General Membership meeting

October – Pay Membership Dues by the 15th (then monthly); Send to CT PTA financial review and copy of Form 990 for previous year; pay AIM insurance renewal; All Presidents and Treasurers need to be trained by the 31st

November – Send CT PTA proof of insurance if not using AIM; Family Engagement Event

December – Volunteer Appreciation Event
January –

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

March – Elect nominating committee according to bylaws; Plan for Teacher/Staff appreciation; review proposed school district budget

April – Annual Meeting & Election of Officers per your bylaws (usually April – June)

May – Prepare budget and present to Executive Committee/Board of Directors

June – Submit Officer Information Sheet to CT PTA (due July 1); budget to General Membership meeting for vote
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
- Council Presidents should build relationship with the Superintendent.

PTA and Principal

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

Remember, we are here to support you!
TREASURER

- Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- Protect members’ privacy by utilizing member information for PTA work only
- Maintain a current procedure book to pass on to a successor
- Work together as a team to improve the lives of all children and their families

ALL PTA BOARD MEMBERS
Think of PTA as a small business.

Establish checks, balances, and controls or maintain them if in place.

Maintains permanent records to track unit funds and financial transactions.

Chairs budget committee and prepares annual budget.

Pays all PTA bills as authorized by the Board.

Prepares reports for every Board and Membership meeting and an annual financial report.

Ensures taxes and reports required by PTA bylaws, insurance or federal and state governments are completed and submitted by the due dates.
Getting Started

- Review files and financial records from last term to better understand the scope of your new position. These should include:
  - Treasurer’s book/ledger, spreadsheets and records
  - Checkbook for PTA bank account
  - Check endorsement stamp, if available
  - Receipt book
  - Remittance forms to transfer money to council and district treasurers
  - Monthly Treasurer’s Reports, Annual Financial Reports and Budgets
  - Federal and state tax records and government filings
MONTHLY TRACKING OF FUNDS

- Maintain a permanent record to track PTA income, receipts and disbursements.
- Submit a written report for board meetings, detailing income and expenses since the last meeting.
- A bank account non-signer reviews bank statement on a monthly basis
  - Required for fidelity insurance coverage
MONTHLY COLLECTION OF FUNDS

- Ensure monies are counted by two PTA members. Use a verification form or system.
- Receive funds collected by other PTA volunteers and issue receipts
- Make deposits of money and checks immediately in a PTA bank account, retaining deposit slips.
MONTHLY DISBURSEMENT OF FUNDS

- Receive itemized bills, sales slips and invoices for payment by check
- Prepare authorizations for payment, signed by the president and second signer as needed
- Issue checks to pay bills as directed by the board
- Keep PTA check book up to date to show current balance
- Reconcile monthly bank statement promptly
- Track membership dues collected and send dues to CT PTA
Prepare annual budget

Present written reports throughout the year, detailing income and expenses since the last meeting.


Ensure taxes and reports required by PTA bylaws, insurance or federal and state governments are submitted by the due dates.
ADDITIONAL ITEMS

- Learn more about PTA policies, procedures and best practices for handling and managing unit funds
- Talk to the former treasurer to get advice and tips about your new role
- Coordinate with unit PTA President
- Maintain cordial relationships with school staff
- Learn the computer program or online system used to maintain PTA financial records.
- Understand PTA insurance
- Fraud and Theft Prevention webinar
- Resources include www.pta.org
SECRETARY
GETTING STARTED

- **Preparation** – Review files and procedure book from last term to better understand the scope of your new position. Materials should include:
  - Secretary’s minute book with minutes from board and association meetings
  - PTA records – Bylaws, membership list, charter, rosters and correspondence
  - Check your bylaws and standing rules to see what your job entails as secretary. If your PTA has a recording secretary and a corresponding secretary, discuss how you will work together.

- Find out more about:
  - PTA policies, best practices and resources
  - *Insurance Loss and Prevention Guide*
  - It’s also worthwhile to talk to last term’s secretary to get advice and tips about your new role.
As one of three required officers for a PTA, the secretary plays an important part in running a unit. One main task is to provide concise and complete minutes for board and association meetings.

Here are some tips on how to produce and handle meeting minutes to help you get started.
When taking minutes at a meeting, focus on noting:

- Actions taken by group in the order they took place
- What is done, not what is said
- This means that any detailed discussion does not have to be included. Personal opinion should never be included in the minutes.
- This is the same focus whether the meeting is in person or virtual.
- If meetings are virtual it becomes more important to coordinate the agenda, in advance, with the President.

Whether you hand-write or use a laptop or device to take notes at a meeting to produce the minutes, remember to include the following information:
MEETING DETAILS:

- Name of your PTA
- Date, place and type of meeting
- Start time and end time of meeting
- Attendance list
- Name and title of presiding officer
BUSINESS ITEMS:

- Approval of previous meeting’s minutes ‘as written’ or ‘as corrected’ with a list of corrections
- Summary of treasurer’s report listing date and balance on hand in the last report, income, expenses and date and balance on hand in the current report
- Motions to adopt budget, financial reports, audit reports and resolutions
- List of payments authorized or expenditures ratified to pay bills
- Motions to approve projects, fundraisers, contracts and bylaws changes, noting person’s name making a motion and vote’s result if adopted or defeated
- For motions with a counted vote, record if a quorum or majority was needed and the number for and against the motion
- For motions requiring a two/thirds vote, note that a two-thirds vote was required for approval after the outcome of the motion
SUMMARIES OF REPORTS

- Summary of officer, chairmen and administrator reports with important, written reports attached
- Election results with nominees’ name and the number of votes each nominee received
- Brief reference to program presented at an association meeting, noting type of presentation, presenter, title and organization represented
- In addition, at the end of the minutes, add your signature and title
It’s always best to complete the minutes soon after a meeting.

Send a copy to the president to review before distributing minutes to the group that generated them.

There are several ways to share minutes with your members. For a smaller group, such as a board, you can email the minutes for review before the next meeting. Bring a few copies to the next meeting.

However, it’s important to keep in mind that PTA minutes are produced only for members and are not for public distribution.

For this reason, they are not posted on any website, on social media or in a newsletter in their entirety.

Instead, if needed, provide only a summary of the minutes online and in school newsletters that highlights the main actions taken at the meeting.
APPROVAL, CORRECTION, PRESERVATION

- Minutes are presented for approval at the next meeting of the group as a standard agenda item.
- Corrections to minutes are made when they are presented for approval at a meeting. They can also be made at any subsequent meeting when an error is discovered.
- Minutes are the legal, permanent records of a PTA as a nonprofit organization and are kept forever. At the end of the term, the master copy of the minutes, should be bound and passed on to your successor. Minutes can be maintained electronically in the manner that your PTA keeps its records.
ALL PTA BOARD MEMBERS

- Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- Protect members’ privacy by utilizing member information for PTA work only
- Maintain a current procedure book to pass on to a successor
- Work together as a team to improve the lives of all children and their families
FIDUCIARY RESPONSIBILITY

An individual in whom another has placed the utmost trust and confidence to manage and protect property or money.

The relationship wherein one person has an obligation to act for another’s benefit.
FOCUS ON PTA MISSION

Make every Child’s potential a reality by engaging and empowering families and communities to advocate for all children.