

Serving as president of a PTA includes the responsibility to lead that PTA toward specific goals chosen by its members. The goals must be consistent with the policies and Purposes of the PTA. The president is the presiding officer and the official representative of the association.

Throughout the year, mailings will be sent from the California State PTA and National PTA that contain important material to assist the unit. Distribute and discuss these materials with the appropriate officers and chairmen.

For PTA training, counseling, or information, contact the council or district PTA president.

All written materials produced by PTA (e.g., newsletters, flyers, website postings, or notices) are to be cleared with the PTA president and school principal before publishing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.

#### *Prior to Taking Office*

To ensure a successful term of office, certain responsibilities begin as soon as new officers are elected.

The president-elect should confer with the school principal and call meetings, as necessary, of the board-elect (elected officers and principal) soon after election to ratify appointed officers, fill any vacant offices and make plans for the coming year. When appointed officers are ratified, they become part of the board-elect.

Hold brainstorming session(s) with the board-elect to establish unit goals. Review past unit activities, become familiar with National PTA and California State PTA goals and Purposes, set realistic goals and prioritize projects. Evaluate current chairman positions and decide which are needed. Ask for suggestions of people to fill chairmanships.

Start recruiting chairmen and committee members; strive for a balance of experienced and new members, keeping in mind that all areas of the community should be represented. Select first those whose work begins immediately: program, budget and finance and membership. If the standing rules or bylaws designate some of these duties to the vice president(s) or treasurer, appoint additional members to their respective committees. A special meeting of the board-elect may be called to ratify the appointment of all chairmen, so they can begin their activities. The president-elect may also do this at the first executive board meeting when the term begins.

Become familiar with the duties of each chairman by reviewing the *California State PTA Toolkit*. Share job descriptions and *Officer and Chairman Job Descriptions*

materials as noted with the chairmen and help them to secure procedure books and materials from their predecessors.

Names and addresses of additional executive board members should be sent to council and/or district PTA for their respective directories.

Attend workshops offered by council or district PTA and urge incoming board members to attend.

The president-elect is one of the unit's delegates to the California State PTA Convention.

Attend the convention orientation meeting held by the district PTA and study materials in order to be a knowledgeable delegate. Be sure to ask the current president for all information regarding convention (State Convention 2.8.1, 64).

Prior to taking office, request the outgoing president's procedure book and review it and all material received from previous president.

Coordinate with treasurer-elect to have the signature cards for bank accounts updated with new officers and submitted to the bank at the beginning of the new term.

#### *During Term of Office*

Be sure a signed facility use permit is on file, if required by the school district. **Never sign** a Hold Harmless Agreement on behalf of the PTA. If the school district requires the PTA to sign a Hold Harmless Agreement for use of school premises, the PTA should contact the California State PTA insurance broker, Armstrong/Robitaille Insurance Services, at 800.733.3036. If you are then directed by the insurance broker to sign a Facilities Use Permit Addendum (Forms 407) they will find that form under the Forms section of this *Toolkit*.

Appoint a committee to review and/or revise the bylaws.

Work with committees in charge of activities scheduled before school begins, such as student registration and welcome for teachers, new students, and parents.

Meet with the room representative coordinator and principal to plan an orientation meeting for room representatives and/or grade level representatives.

Confer with officers and chairmen regarding plans for the year and progress toward set goals.

Prepare a master calendar that includes executive board meetings, association meetings, PTA special events, and president/principal meetings.

Order PTA materials that will be helpful to officers/chairmen in fulfilling their responsibilities. This is a legitimate PTA expense. If possible, obtain a subscription for the principal to *PTA in California*, the official newsletter of the California State PTA, and *Our Children*, National PTA magazine. Promote PTA officer/chairmen use of the PTA websites: [www.capta.org](http://www.capta.org) and [www.pta.org](http://www.pta.org)

The *California State PTA Toolkit* is included in the summer service mailing and includes membership enrollment materials, which should be reviewed and given to the membership chairman. Membership enrollment may be planned before the service mailing is received. Arrange to obtain membership envelopes and cards according to procedure of the council or district PTA. The PTA may wish to print its own envelopes.

Make certain membership enrollment activities are approved by the principal and do not interfere with school activities.

Membership enrollment may begin at any time in the new term and should continue throughout the year.

All members must receive a membership card. Remind each member to sign the card. Remind the membership chairman to insert the October 31 expiration date on each card.

Schedule a budget committee meeting with the principal and officers (treasurer, program chairman, and fundraising chairman) whose input to the budget is important. Verify programs and fundraising activities comply with insurance guidelines.

Have the proposed budget, including programs, fundraisers, California State PTA convention, and other plans, presented to the executive board.

The association must approve the proposed budget, including programs, fundraisers, and other plans, before implementation (which includes the signing of contracts). A motion for each fundraiser, including how the money will be used (books for the library, etc.), must be approved by the association. This should be done at the first association meeting of the new term (The Agenda, 2.1.9, 29; Fig. 2-1, 30-31).

It is the responsibility of the president and unit delegates to attend the council meetings (if in council) or district PTA meetings (if not in council). Check with council (if in council) and district PTA for meetings or training programs that may be held during the year.

The executive board fills any vacant offices and ratifies additional chairmen and committee members before the school term starts.

Remind the treasurer to send the per capita portion of dues for council (if in council), district, State and National PTA, through channels each month; to submit insurance premiums by the district PTA due date; to prepare and submit the mandatory Workers' Compensation Annual Payroll Report through channels by the due date (Financial Officers' Reports 5.1.6, 218).

Remind the treasurer to schedule audits of the financial books twice a year (Audit 5.4, 227; Forms 385) and to determine whether the council or district PTA requires a copy of the Annual Financial Report (Annual Financial Report Form 5.1.7, 218, Forms 381).

Work with the program committee to complete plans for Founders Day, typically celebrated in February (Founders Day 7.14, 309). Include an opportunity to collect the Founders Day Freewill Offering in the program. Remind the treasurer to remit any funds collected promptly to council or district PTA.

Appoint an award committee to select local recipient(s) for award(s) (Awards 7.6, 294; Forms 363). Be sure a motion is made to authorize the purchase of Honorary Service Awards and emblems, to be ordered from the state office in time for the presentation. Allow six weeks for delivery (Honorary Service Award 7.6.3, 295; Forms 361).

Forward any proposed resolutions for the California State PTA convention in time for council or district PTA action (Convention Resolution Process 2.9, 66).

Review the California State PTA convention registration information when received. Prepare convention pre-registration and housing materials as instructed by council (if in council) or district PTA.

#### *Prepare for Association Meetings*

Check with program and hospitality chairmen about arrangements.

Work with the publications, public relations, and room representative coordinators on meeting notices, publicity, and parent contacts.

Be sure the proposed budget, including programs and fundraisers, is presented for adoption at the first fall association meeting (The Budget 5.2, 219; Forms 387).

Prepare the agenda for the meeting ahead of time, and provide copies to the secretary and parliamentarian (The Agenda 2.1.9, 29; Sample Agenda Fig. 2-1, 30-31).

Check bylaws for the procedures to elect the nominating committee, and include that election on the appropriate month's agenda.

Check bylaws for the meeting designated for the election of officers, provide the required notice of the election to the membership and conduct election.

Conduct election of delegate(s) to the California State PTA convention. The number of delegates is determined by unit membership. Elect an alternate for each delegate (State Convention 2.8.1, 64).

*End of Term*

Submit a roster that includes the name, title and contact information for the new officers to council or district PTA.

Give helpful materials to the president-elect immediately following the election (Procedure Book 2.3.4, 38).

Work with the president-elect to plan the installation of new officers.

Invite incoming president to attend meetings of council or district PTA and meetings of community groups.

Continue president's responsibilities until new officers assume office. Encourage cooperation and sharing of materials between outgoing and incoming board members.

Work with the historian to compile the Annual Report, and mail this report by the council or district PTA deadline (Unit Annual Reports 2.3.5a, 38; Forms 475).

At the last association meeting of the school year, a motion should be made authorizing the executive board to pay necessary summer bills. A motion may also be made to appoint a committee to read the minutes of the last association meeting of the year and report at the next association meeting.

See that outstanding bills have been paid, committee reports have been filed, projects have been completed and financial books are scheduled for audit. Be certain that any correspondence, including thank you notes and acknowledgments, have been sent.

When the term as president is completed, stay involved but not in charge.

**RESOURCES AND REFERENCES**

National PTA

*Quick-Reference Guide*, Leadership Section

Website: [www.pta.org](http://www.pta.org)

*Our Children* (National PTA magazine, subscription)

California State PTA

*California State PTA Toolkit* (English and Spanish)

Leadership Pocket Pal (English and Spanish)

Financial Pocket Pal (English and Spanish)

Administrator's Manual

State PTA convention training handouts

Website: [www.capta.org](http://www.capta.org)

*The Communicator*

*PTA in California* (official newsletter of the California State PTA)

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