

Welcome to the May 2021 TCPTA Recording Secretary's Training Workshop!

The goal of this workshop is to prepare you for the essential job of Recording Secretary. You will create, through the minutes you record, the working legal record for activities of your PTA. Review the packet information. Reach out with any questions that arise.

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Tips:

- Have your president email a “Word” version copy of each meeting agenda, in advance of the meetings. Use the actual agendas to record the meeting details, to use in preparing the minutes. Hard copy vs computer version...What is best for you? Keep agenda note pages and any additional materials in a clipped packet, in a dedicated file (accordion, box, file cabinet, computer file, Google Doc) for each meeting of each type, arranged by month, with attachments for the minutes of that month.
Organization is critical as you will have a LOT of documents to sort/maintain.
- You may want to set up templates—one for board meetings and one for association meetings. See templates from TCPTA, on TCPTA website, for possible use.
- Be sure to make a copy of everything—reports, agendas, flyers, etc.
These materials also go in the dedicated file for each meeting of each type, arranged by month.
One set is for the permanent record (pages are bound in a book or pasted into a recording secretary's book.) Store the permanent record papers by month (until bound).
- Have meeting attendees use motion slips or write motions in chat...every time.
- Keep a “recording secretary's kit” with you—It is useful to have these often needed supplies for use at meetings: post-its (small and a bright/pastel one), mini stapler and staples, scissors, permanent marker, paper clips, pens (including a red pen), scotch and blue painter's tape.

Resource packet for workshop 5-17-21 (also posted on the TCPTA website)

www.torrancecouncilofptas.org

1. Welcome to the TCPTA Recording Secretary Training Workshop
2. TCPTA Tips for a PTA Recording Secretary as of May 2021
3. All About Motions and What to do
4. TCPTA Motion Form
5. CAPTA Job Description
6. Other resources for Recording Secretary including Templates for Exec Board and Association Election Meeting minutes, Sample general minutes, etc. Check it out!