California State PTA
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Job Description for President

2327 L Street, Sacramento, CA 95816-5014

Key Role – President

- Oversees and coordinates the work of an executive board to run a PTA effectively
- Presides at PTA board and association meetings
- Serves as the official contact, communicator and representative of a PTA
- Designated as an authorized signer for PTA checks, contracts and authorizations for payment
- Serves as ex-officio member of all committees except the nominating committee
- Works with other PTA leaders to connect families, school and community to support student success

Getting Started

Preparation – Review files, procedure book and materials from last term to better understand the scope of your new position and learn more about:

- President's role and responsibilities in running a PTA
- Duties of each officer and chairman
- California State PTA policies, procedures and resources
- PTA council and district information
- Community resources

To expand your skill sets as a leader, plan to attend PTA council/district training along with the other members of your board.

Start recruiting chairmen and committee members, selecting first those whose work begins right away such as programs, budget, membership and communications.

Encourage experienced and new members to get involved and share the workload to grow leadership for today and tomorrow.

Networking – Soon after election, meet with the current president to talk about your new role, what works well and what needs to be tweaked to make your PTA even better.

Discuss ways to share information and files among outgoing and incoming board members to ensure a smooth transition.

Get connected by participating in meetings with your council/district PTA, principal and community partners. And, as a unit delegate to the California State PTA convention, take part in your PTA district's convention orientation.

Board Orientation – Arrange for the incoming board to meet to begin organizing for the new term.

To help select what PTA activities to focus on, encourage everyone to assess last term's programs and efforts. That way, you don't need to reinvent the wheel in making your plans.

At your board orientation, take time as well to:

- Set ground rules for meetings
- Identify 2-3 priorities as a team to make a difference in your school community
- Review your Bylaws to learn more about PTA
- Check the Insurance Guide for the Green-Yellow-Red Light activities a PTA can sponsor
- Get to know each other better and build relationships

At orientation, your board can also ratify the officers, chairmen and committee members appointed by the president and fill any vacant board positions so they can begin their activities. This may also be done at the first board meeting after the term begins.

Important Tasks – At the start of the year, submit a board roster, with names and contact information, to your council or district PTA.

Remember to update the signature cards for any PTA bank account and any usernames and passwords for access to the PTA website, social media and online services.

Did you know? … 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
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

HOW TOS

Running Your PTA – Monthly Activities

As the team leader, the president oversees and coordinates the work of the executive board in running a PTA.

Here are some tasks that, typically, the president works on each month.

Facilitating:

- Prepare for board meetings and create an agenda to send to the board ahead of time
- Lead board meetings, following the agenda to keep everyone on task
- Review board reports including those prepared by the treasurer, financial secretary and membership chairman plus the secretary's minutes from board meetings
- Sign PTA checks and authorizations for payment along with another, designated board member

Collaborating:

- Touch base with other team members about their plans and preparations for upcoming events
- Meet with the principal to share information on PTA and school activities and to clear all PTA written materials before publishing in hard copy or posting online
- Ensure that PTA volunteer hours are recorded and tallied for the Annual Historian Report

Communicating:

- Update board, members and community stakeholders on PTA plans and activities, encouraging input and feedback
- Thank PTA volunteers for their time, talents and efforts
- Promote outreach, inclusion and diversity to connect families, school and community

Managing Meetings – Quick Tips

PTA surveys tell us that members say meetings are effective when they know why they are meeting, believe their time was well-spent making decisions and feel they accomplished something at a meeting.

That's why the president's primary role at meetings is to act as a facilitator to set the tone and manage PTA business in an effective way. And, the main role of the board is to come prepared and assist the president in working through the agenda.

Here are some ways to help make meetings more effective and productive:

Before A Meeting – As part of your preparation, consult with other board members to identify the meeting's chief objectives, activities to engage participants and who will present verbal and written reports. This helps determine what to include in the agenda that you'll create for the meeting.

Send the agenda to participants ahead of time and widely publicize the purpose of the meeting.

To boost participation, add social time before or after a meeting for everyone to network. And, recruit interpreters and translate handouts in home languages for your meetings.

At A Meeting – Successful meetings give you an opportunity to inform, inspire and empower members. To run an effective meeting, keep everyone on track and time by following the agenda.

As the facilitator, it's also important to **r**emain fair and unbiased so everyone feels welcome and able to participate.

At the end of the meeting, take time to summarize what was accomplished and important next steps for business items.

After A Meeting – Share the results of the meeting with participants to keep them connected to the work of your PTA. And, follow up with officers and chairmen on next steps and action items to complete tasks and accomplish goals.

Working With Administrators – 6 Effective Ways

School leaders and the PTA represent two important groups on the school campus: staff and parents. They work closely together at a school site as partners in education to support student success.

To nurture this important partnership:

1. **Set the Tone** – Build a relationship and collaborate together.
2. **Two-Way Communication** – Meet with the principal early in the year and keep him or her updated on events, activities or concerns.
3. **Collaborating with the School** – Be aware of the school's improvement needs and encourage PTA members to actively participate in school site councils, governance teams, or related committees.
4. **Training Opportunities** – Offer to provide parent training and resources at the school.
5. **School District Level Involvement** – Use the school district's master calendar to become aware of activities where PTA's presence is needed and request an opportunity to provide a presentation at school board meetings.
6. **Build a Strong Team** – Ask for the principal's help in encouraging staff to become PTA members. Learn from others and share your knowledge as well.

Other Useful Information

Resources:

California State PTA – www.capta.org

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

Online Services:

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- PTAEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

National PTA – www.pta.org

- Run Your PTA tab and more
- E-Learning Workshops
- *One Voice* Blog

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