

PTA President/Parliamentarian Workshop

Torrance Council of PTAs – Sept. 2021

PTA Structure

- UNIT (your school PTA Unit)—
 - Two meeting types: 1.) Executive Board, 2.) Association

- COUNCIL—Torrance Council—Oversight of all Torrance PTAs
 - Three meeting types:
 - 1.) Board of Directors (monthly dates in Directory),
 - 2.) Exec Board (monthly dates on calendar in Directory),
 - 3.) Association—Oct., Feb., Spring-June; locations TBA.

Council Monthly Exec Board Meetings-

Plan to attend monthly; Calendar/dates in Directory
(Send someone in your place if you cannot attend)

- ▶ Checklists prior about items due at each meeting
- ▶ Financial Procedures; get financial people trained
- ▶ Honor Roll; in directory, submit items as listed
- ▶ President's Reports
- ▶ Presidents' Roundtables
- ▶ Training; Get Exec Board members trained
- ▶ Mentors; Listing in Directory, utilize mentor help

Torrance Council: First point of contact for any question.

President: Terry Ragins, TorrancePTAs@gmail.com

- ▶ BOD Officer, VP, Chair: Check directory listings.
 - ▶ Mentor: Check directory, please use mentor assist
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- THIRTY-THIRD DISTRICT PTA—Covers all of Southern California, Monthly Exec Board meetings, Two Association meetings Fall/Spring

 - CALIFORNIA STATE PTA—CAPTA Convention in Ontario, 4/28-30/2022

 - NATIONAL PTA—National Convention in Wash DC area, 6/16-19/2022.

The Mission of the PTA

The **mission** of the California State PTA is to positively impact the lives of all children and families.

The Purposes of the PTA

- ▶ To promote the welfare of children and youth in home, school, community and place of worship.
- ▶ To raise the standards of home life.
- ▶ To secure adequate laws for the care and protection of children and youth.
- ▶ To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- ▶ To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social and spiritual education.

PTA Basic Policies

NON COMMERCIAL

- ▶ Prevents the name PTA or the names of PTA officers from being used in commercial promotions
- ▶ Does allow for the assistance of commercial enterprises that sponsor educational or charitable programs. No endorsements.

NON SECTARIAN

- ▶ Recognizes the right and importance of every person to their own spiritual belief.
- ▶ Does not support the advancement of any single belief.

NON PARTISAN

- ▶ Allow PTA to support principles and issues, but not individual candidates or political parties.
- ▶ Promotes unit membership to take action by becoming informed on the issues, communicating PTA positions, meeting with elected and appointed officials, writing letters and exercising the individual's right to vote.

Legal Documents

- ▶ **Charter:**
 - Issued by the California State PTA at the time the PTA was organized.
- ▶ **Minutes:**
 - Permanent legal record of all business and financial reports
- ▶ **Bylaws:**
 - Rules of your organization, as approved and signed by the California State PTA parliamentarian and voted by your members
- ▶ **Books of Account:**
 - All financial records should be kept for seven years, which include the current year. Ledger books are kept permanently.

Unit Bylaws Please Take time to read them!
Parliamentarians, this is where you can be most helpful
...someone need to know all aspects of Unit Bylaws!

- ▶ Official Name
- ▶ Basic policies of the organization
 [501(c)(3) qualifications]
- ▶ Membership qualifications and dues
- ▶ Officers and how elected
- ▶ Officer duties
- ▶ Meetings required - including quorums necessary to conduct business
- ▶ Required actions (audits, elections, etc.)
- ▶ Requirements for disbanding
- ▶ Requirements for amending bylaws
- ▶ Reporting Requirements (budgets, annual reports, governmental filings, etc.)

PTA President Duties

- ▶ Coordinate all work (**create a separate email account**)
- ▶ Meet with principal or school site administrator regularly
- ▶ Preside at association and executive board meetings
- ▶ Develop agendas
- ▶ Make committee and chairman appointments
- ▶ Understand financial procedures and requirements
 - Stay on top of financials...monitor reports and official filings
 - Sign all authorized requests for payment
 - Be an authorized check signer
 - Beware of Email Scams
- ▶ Sign all contracts, with one other elected officer
- ▶ Complete facility use permit applications online
- ▶ Represent the association – attend all council and district meetings including workshops and conferences

- ▶ Attend Annual California State PTA Convention
- ▶ Prepare written reports each month and turn-in monthly Treasurers Reports and Meeting Minutes to council
- ▶ Forms: Payment Authorization, Cash Verification, Remits: May be purchased from TCPTA. Contact TCPTAfinancial@gmail.com
- ▶ Ensure that your unit's annual historian's report is written
- ▶ Do not ignore anything from the IRS, FTB, AG!
- ▶ Quorum as determined by your bylaws
- ▶ Parliamentarians and Presidents are a team...essential to effective function of unit; Appoint Parliamentarian Pro Tem, if none on board.
- ▶ Unit in Good Standing:
 - ▶ 15 members, including president, treasurer, secretary
 - ▶ Dues, insurance premiums, member names submitted to Thirty-third and CAPTA by deadlines
 - ▶ Approved bylaws updated according to necessary timelines
- ▶ Programs and fundraisers
 - ▶ 3-1 Rule (3 non-fundraising projects, 1 fundraiser)
 - ▶ PTA should not be fundraising with a gift to school as their driving force. Focus on Programs for students and **IF** you have any money left then consider a gift to school.
- ▶ Follow up with your officers and chairmen as needed
- ▶ Email Etiquette (Provide this handout to your entire board.)

Executive Board Duties

- ▶ Meet monthly - There must be at least 14 days between the Executive Board and Association meetings.
- ▶ Who attends: Principal, Teacher Reps., Student Reps., Officers and Chairmen (or as specified in the bylaws)
- ▶ Transact business between Association meetings
- ▶ Ratify all actions voted by Exec Board at Association meetings
- ▶ Handle business as directed by Association
- ▶ Pay bills in timely manner; MyPTEZ is a great resource.

- ▶ Create committees and reviews recommendations
- ▶ Recommends actions to Association
- ▶ Fill any vacancies that occur
- ▶ Present reports to Association
- ▶ Receive financial reports

Association Duties

- ▶ Meet on dates set in bylaws; if changes need to be made, post new meeting dates/times according to standards in bylaws
- ▶ Who attends? - Members and guests
- ▶ Elect nominating committee
- ▶ Elect officers
- ▶ Approve/Ratify all PTA expenditures
- ▶ Approve all contracts for PTA programs, events, and projects
- ▶ Approve all programs
- ▶ Adopt the budget
- ▶ Adopt all audit reports
- ▶ Elect convention delegates
- ▶ All programs and fundraisers must be approved by your Association!

PTA Committees

- ▶ Committees are formed to:
 - Plan
 - Promote
 - Implement
- ▶ Appointed or elected, according to bylaws
- ▶ The president appoints committees subject to ratification except for the nominating committee which is elected
- ▶ Make recommendations to the executive board – they do not act on their own
- ▶ The president is an ex-officio member of all committees except the nominating committee

Nominating Committee

- ▶ Elected by the association at least 60 days prior to the annual election meeting
- ▶ Number of members/alternates
- ▶ Who can be a committee member?
- ▶ Chairman is elected by the committee
 - Conducts meetings
 - Contacts potential nominees
- ▶ Presents report at least 30 days prior to the Annual Election Meeting
- ▶ Work is concluded at time of elections

Annual Election Meeting—See script on website

- ▶ Date is specified in the bylaws, generally Feb or so.
- ▶ Script:
 - Parliamentarian's role
 - Nominating Committee Chairman's role
 - President's role
- ▶ Nominations must be open to the floor
- ▶ Voice Vote
- ▶ Ballot Vote
 - Record results in minutes
 - Motion to destroy ballots

PTA Meeting Agenda

- ▶ Call to Order
- ▶ Pledge of Allegiance
- ▶ Approval of minutes
- ▶ Financial Reports
- ▶ Report of Executive Board
- ▶ Committee Reports
- ▶ Unfinished Business
- ▶ New Business

- ▶ Principal's Report
- ▶ Program
- ▶ Announcements
- ▶ Adjournment

Eight Steps to a Motion

1. Obtain the floor
2. Recognition by the chair
3. Make the motion, "I move that...."
4. The motion is seconded
5. Chair restates the motion
6. Debate or discussion
7. Putting the question – the vote
8. Chair announces result

Resources for PTA Info

- ▶ **Torrance Council Board of Directors: See listing in Directory**
 - President Terry Ragins, TorrancePTAs@gmail.org
 - TCPTA mentors, see Directory; Share your Unit Exec Board meeting dates, ask qsts, discuss issues, etc.
 - All TCPTA officers and BOD chairpersons, see Directory

Direct all questions and concerns to TCPTA; all documents/payments are submitted to and through TCPTA...do NOT send to Thirty-Third/CAPTA.

- ▶ **Torrance Council website: www.torrancecouncilofptas.org**
Agenda for PTA President/Parliamentarian; Fall 2021
TCPTA Legal Aspects for Running PTA Events

Under TCPTA Training Tab, Presidents:

Spring 2021 Presidents Workshop Slides

Spring 2021 New Presidents Workshop Handouts

Spring 2021 Annual Action Items Listing

Winter 2021 Election Procedures/Bylaws

Winter 2021 Virtual Unit Election Script

Winter 2021 Bylaws Review Handouts

Fall 2020 Presidents and Parliamentarians

Training and Packet, 2 items

- ▶ **Torrance Council** President: Terry Ragins
 - ▶ email: torranceptas@gmail.com
 - ▶ phone: 310-408-4482

- ▶ **Torrance Council of PTAs Directory**
 - ▶ Council BOD Roster, Unit Rosters
 - ▶ Council meetings, calendar, preliminary budget
 - ▶ Mentor Team Listings with contact info; use them!
 - ▶ Honor Roll requirements, due dates for reports
 - ▶ Council Bylaws

- ▶ Thirty-Third District website: www.33rdpta.org
- ▶ California PTA Toolkit at www.CAPTA.org . Useful resources, forms, procedures for most PTA functions; REALLY GOOD-Summer mailings;
“Leader Welcome Packet 2021”,
“Running your PTA...Made Easy”

- ▶ Insurance Loss & Prevention Guide (Green Light, Yellow Light and Red Light) at CAPTA/Aim PTA Insurance