



# PRESIDENT

Congratulations on being elected PTA President. Your continuing journey through leadership development is exciting. With the tips below, training opportunities, resources, and reminders, you will be off to a great start! You will grow as you foster an environment of open communication among all board members. Your service as an ex-officio member of all committees, except the Nominating and Financial Reconciliation committees, will help create a productive environment for all. As you work with all executive board members to help meet their goals and required duties, you will flourish with the other leaders in your PTA. Good luck, and thank you for your service!

## TOP THINGS TO KNOW FOR THIS POSITION

1. Call a meeting of the elected officers within 30 days of the election meeting to appoint the historian, if applicable, parliamentarian, and standing committee chairs. Appointments are subject to the approval of the board.
2. Register yourself and remind all executive board members to register through Texas PTA's Executive Board Registration online system.
3. Schedule a meeting with your campus administrator to discuss goals and expectations for the upcoming year.
4. Plan and execute your meetings by creating agendas and using the "Build-a-Script" section in the Basics President Resource Guide.
5. You are the signer of all contracts approved by the board.

## KEY TRAINING

- FOUNDATIONS Essentials:** An introductory course for new PTA leaders required once in their PTA service
- Basics Boardsmanship:** Required online course for all executive board members.
- Basics President:** Required online course for all presidents.

### Key Resources

- Basics Boardsmanship and President Resource Guides:** Written resource guides provide more in-depth answers to questions you may have about serving as president.
- Basics Principal Desk Reference**
- Facilitator Guide**

## IMPORTANT DATES AND DEADLINES

- **August:**
  - Join your Local PTA.
  - Develop a plan of work and submit it to the executive board for approval.
  - Sign the Confidentiality, Ethics, and Conflict of Interest Agreement and submit it to the secretary.
  - Review your Records Retention Policy.
  - Request a new copy of your bylaws from Texas PTA to ensure you have the most current verbiage.
- **By October 31:** Ensure your Local PTA is considered active to participate in the Reflections program.
- **Every Month:** Ensure all members and dues are reported to Texas PTA promptly and help your membership chair recruit members to earn the monthly Texas PTA Membership awards.
- **January/February:** Elect a nominating committee at the membership meeting prior to your election meeting.
- **April/May:** Appoint a Financial Reconciliation committee at the last membership meeting of the year.
- **July:**
  - Ensure the treasurer has *electronically* filed the appropriate 990 with the IRS.
  - Go to the bank and follow their procedures to be an authorized signer on the bank account.
  - Attend the Texas PTA LAUNCH convention.

Questions? For more resources, visit [txpta.org/president](https://txpta.org/president); email [president@txpta.org](mailto:president@txpta.org); or contact your Council PTA, Field Service Representative, or the Texas PTA Office at 1-800-TALK-PTA.

# Quick Start Guide

*The Basics materials provide essential training for many PTA positions. This guide is just the beginning!*

## ABOUT PTA

The mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

*What this means: We engage, empower, and advocate to achieve our vision—every child's potential is a reality. Our mission statement guides us and should drive any significant decision. The funds we raise are used to support our mission.*

## WHAT IS PTA?

PTA is a 501c3, member-based association that advocates for the best interest of ALL children in many areas. It is self-governing and non-partisan. PTA advocates for or against issues but does not endorse any candidate or political party.

*What this means: You are a member of a nonprofit executive board and therefore have certain legal responsibilities. Executive board members have three fundamental fiduciary duties: the duty of care, duty of loyalty, and duty of obedience. Executive board members act as trustees of the PTA's assets and must exercise due diligence to oversee that the PTA is well-managed and that its financial situation remains sound. The executive board verifies that all filing requirements and tax obligations are completed.*

## OUR PURPOSE

- Welcoming families into the school community
- Communicating effectively
- Supporting student success
- Speaking up for every child
- Sharing power
- Collaborating with communities

## PTA STRUCTURE

Members  
Local PTA (campus level)  
Council PTA (district or community)  
Texas PTA  
National PTA

## FINANCE

### The Life Cycle of A Budget

- Elected/appointed executive board members create plans of work which include a budget detailing project-related expenses.
- PTA happens, and expenses occur.
- The executive board approves the plans of work, and the membership votes to adopt the budget plan. Financial reports are presented at each regular executive board and membership meeting. Financial reconciliation happens at the end of the year, and the membership receives the report at the first meeting of the next school year.

## TRAINING

Scan the code or visit [txpta.org/pta-training](https://txpta.org/pta-training) to learn more.



## GETTING STARTED

As a leader in PTA, there are a few things you need to do to start the year.

### ONE

First, join your local PTA! All executive board members must be PTA members.

### TWO

Next, register with Texas PTA at [txpta.org/register-as-a-board-member](https://txpta.org/register-as-a-board-member).

### THREE

Your local PTA secretary asks all executive board members to sign a Confidentiality, Ethics, and Conflict of Interest Agreement.

### FOUR

Your local PTA president asks all executive board members to create a plan of work, which begins the annual budget process.