PTA Boardsmanship

MCCPTA Leadership Training

Montgomery County, MD

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Purpose of the PTA

- To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA Values

National PTA

- Collaboration

- Commitment

- Diversity

- Respect

- Accountability

PTA is a non-profit organization

- PTA is an ADVOCACY organization

- Supports educational issues for *all* students in your school

- PTA is non-partisan and cannot endorse any candidate in any public election (local, state, national)

- Fundraising is *not* the primary purpose of PTA
  - plan three PTA events or activities for each fundraising event (IRS requirement)

Responsibilities of

a Board Member

+ What does it mean to be on a Board?

An organization's Board of Directors is responsible for:

- Leadership
  - Ensure that the organization follows it mission, obeys bylaws and public laws

- Meaningful Programs and Services
  - Meet the needs of the community; encourage involvement

- Financial Management
  - Develop and oversee budgets
  - Ensure financial accountability
  - Secure non-profit status

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Board Standards

- Duty of care
  - Level of competence expected of board members
  - Exercise care when making decisions as a steward of the organization

- Duty of loyalty
  - Demonstrate undivided allegiance when making decisions affecting the organization
  - Act in the best interest of the organization

- Duty of obedience
  - Be faithful to the organization's mission

+ Typical BOD duties (refer to bylaws)

- Carry out business between general meetings

- Create committees

- Approve plan of work for standing committees

- Approve annual budget to submit to general membership for final approval

- Select auditor or auditing committee to audit treasurer's accounts

Typical executive committee duties (refer to bylaws)

- Elect committee chairs

- Manage business of organization

- Submit report at BOD meetings

+ Good Practices for Board Members

- Be aware of important events in the organization.

- Stay informed about the community the organization serves.

- Stay informed of organization's current positions on issues.

- Review materials provided by the board.

- Attend board meetings and training sessions.

- Be aware of changing or new laws and policies that impact the organization.

+ Build a Strong Board

- Encourage new membership on your Board, i.e. new Officers and Committee Chairs

- Encourage diversity on your Board
  - Race, culture, neighborhood, income, family members

- Ensure that your Board reflects your school population

Governance Structure

- Benefits
  - Functional organization
  - Get things done
  - Prevent chaos and unruly meetings

- Components
  - Board of Directors
  - Committees
  - Bylaws
  - Parliamentary Procedure

+ Who is on the Board of Directors?

- Defined <u>in bylaws</u>

- PTA BOD generally consists of:
  - Elected Officers/Executive Committee: President; Vice President(s), Treasurer, Secretary
    - No co-presidents or co-treasurers
  - Standing Committee Chairs
  - MCCPTA Delegates (2)
  - Principal
  - May include other organization representatives (ex. NAACP)
  - May include parliamentarian
  - May include cluster representative

+ Bylaws Basics

- Define governance structure

- Approved by local PTA membership

- All board members should be familiar with and follow bylaws

- All members should have access to bylaws

- When in doubt, refer to Roberts Rules of Order

Updating PTA Bylaws

- Each PTA must update their Bylaws every three years

- Consider questions, concerns, situations that have come up

- Keep level of detail similar to MD PTA bylaws template
  - Create standing rules if more details are desired

- Membership must approve bylaws, even if there are no changes

- Submit signed original to MD PTA, keep a copy in local files

+ Why does your PTA need bylaws?

For your school community

- Creates transparency – all members know the basic rules

- Assures smooth transition – explains how to nominate and elect officers

- Assures accountability – provides the ground rules for decision making and managing money

+

Why does your PTA need bylaws?
For MCCPTA and Maryland PTAs

- Creates the same ground rules for all PTAs

- Allows flexibility for local PTAs to include their priorities

- Requirement to maintain status as a PTA

Why does your PTA need bylaws?
For the IRS

- Tax laws require non-profit corporations to have bylaws

- Outlines organization's purpose

- Requires minimum of 3 Officers
  - President
  - Treasurer
  - Secretary

+ Committees

Purpose: Implements the work of the organization

- Develop & implement advocacy issues, programs & activities relevant to needs & interests of school community
- The work
  - Make work plans and develop budget
  - Decide and execute details about a particular activity
- Develop or use the expertise of members

+ Committees

Organization

- Diverse membership
- All committee chairs & members should be PTA members
- President serves as ex-officio member to all committees, other than Nominating
- Large enough to carry out the assigned work with sharing the responsibilities, and small enough for input and discussion

+ Parliamentary Procedures

- Robert's Rules of Order

- Initial meetings set the tone for the year

- Purpose
  - Ensure orderly meetings
  - Allow opportunities for members to participate
  - Prevent individual attendees from dominating a meeting
  - Prevent chaos

Rules of Effective Meetings

- Agenda guides the meeting

- Provide members with documents prior to meetings

- Follow the bylaws, meeting/standing rules to guide decisions

- Stay on time – start, end, reports

- Take minutes to record discussions and decisions

+ Role of Presiding Officer

- Be welcoming to all members

- Run an effective meeting

- Know your bylaws, Parliamentary Procedures

- Remain neutral during debates

- Do not vote on motions, except to break a tie

+Sample Agenda

- Call to Order

- Approval of Agenda

- Approval of Minutes

- Treasurer's Report

- Officer's Reports (e.g., President, Vice President, Delegate)

- Principal's Report *(local PTA general meetings)*

- Standing Committee Reports (e.g. Membership)

- Unfinished Business

- New Business

- Adjournment

+ Voting by Robert's Rules

- Make a motion   "I MOVE"
  - May be submitted in writing, in addition to spoken
  - Secretary should record who says this
- 2nd the motion   "I SECOND"
- Discussion   DISCUSSION
  - Each speaker may be limited by time
  - No one speaks a second time if others are waiting to speak
  - All discussion is directed to the Presiding Officer
- All in favor   "AYE" or "YES"
- All opposed   "NAY" or "NO"
- Abstain   "ABSTAIN"
  - The Presiding Officer does not vote, unless needed to break a tie
- Announce results

Content of Minutes

- Name of PTA, date/hour, place

- Who presided/attendees/presence of quorum

- Previous minutes approval/corrections

- Committee reports—written report may be submitted

- Motions (with names)- best to use motion slips
  - Pass or fail
  - Voice vote OK -- record if specific tally

- Any programs, announcements, future meetings, etc.

- Note call to order and adjournment times

+ Information to Keep Handy

- **Local PTA documents**
  - Bylaws
  - PTA Roster of Officers, Board of Director & Membership Directory
  - Budget
  - Meeting schedule, school calendar
  - Procedure book including the PTA's goals, plan of work, and reports from predecessor

- **Robert's Rules of Order, Newly Revised**

- **MCCPTA documents**
  - Blue Book – Bylaws, Directory
  - Suggested Timeline for PTA Leaders
  - Guidebook(s) appropriate to position

+ Final thoughts

- Board of Directors - core team that represents the members in meeting the PTA goals

- PTA programs and activities should focus on education & healthy development and help *all* students and families

- PTAs should create a welcoming and inclusive environment

- Bylaws and standing rules govern the PTA

+ For More Information

- MCCPTA Guidebook: Board of Directors

- National PTA – online training

- MCCPTA President: Lynne Harris

- MCCPTA Bylaws Chair: Kellie Schoolar-Reynolds

- MCCPTA Training Chair, Past MCCPTA President: Frances Frost

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