

# **DRAFT** PTA Leadership Guide 2009 - 2010

## **PTA MEETINGS**

There are three types of PTA meetings

1. Executive Board Meetings (Officers, Chairs and Administrator)
2. Executive Committee Meetings (Officers & Administrator)
3. General Meetings (PTA membership)

All PTA members are expected to attend General Meetings, typically 3-4 times. Officers and Chairs are expected to attend Executive Board Meetings typically on a Monday evening (7 pm). Officers are also expected to attend Executive Committee Meetings on alternating months on a Monday afternoon (12 pm). All PTA Leaders are encouraged to attend any meeting when agenda items pertain to their responsibilities. The Executive Board and the Executive Committees require simple majorities to conduct business so attendance is important. When a Chair or Officer can not attend a meeting must let the Secretary know as soon as possible. The Secretary will inform the Board if it appears that a quorum will not be present at any particular meeting. Unfortunately, proxies are not allowed under our by-laws (Article IV, Sec. 10), so the attendance of Chairs and Officers is very important.

Meeting agendas are created by the President. A draft agenda will be distributed to all PTA leaders (e.g. Chairs, Officers and School Representatives) one week prior to a meeting. PTA leaders are encouraged to submit items for the agenda before creation of the draft agenda. Items submitted to the President at any time prior to the meeting.

The dates for 2009-2010 meeting are:

- 8/20- Meet the Teacher Night
- 9/15- Exec Board Meeting (evening) (Elected Officers & Chairs)
- 9/24-General Meeting (evening) / FWES OPEN HOUSE
- 10/11-Executive Council Meeting (Day) (Elected Officers)
- 11/9- Exec Board Meeting (evening) (Elected Officers & Chairs)
- 11/12 & 11/19- FWES Teacher/Parent Conferences
- 12/7- Executive Council Meeting (Day) (Elected Officers)
- 12/10- General Meeting/ FWES HOLIDAY CONCERT
- 1/11- Exec Board Meeting (evening) (Elected Officers & Chairs)
- 2/8- Executive Council Meeting (Day) (Elected Officers)

## **COMMUNICATION CENTER**

The PTA Communications Center is located in the corner of the Teacher Mailroom. On the wall near the exit door is a rack of colored folders for each Committee Chair (color-coded by folder). The folders each have the Committee and Chair Name(s). Do not remove folders from the room or we won't have anywhere to put your mail. Folders should be checked regularly by that chair. "Regularly" may mean different things to different chairs at different times of the year. At minimum, all chairs should check and empty their folders starting the first week of school. Folders are NOT for storage. If your committee needs additional storage space in the file cabinets below, please speak with the VP of Communications.

Mail received in the main PTA mailbox will be sorted into the folders. The President and Treasurer will do the same for items erroneously put into their respective boxes. Items related to communications with the Treasurer should be placed in the Treasurer's lucite box. Items that should be placed in the lock box located on the wall.

A "Blue Bin" is located near the folders to collect from teachers anything returned to the PTA on Monday Folders. Chairs should check and empty that frequently when using the folders. The Treasurer may also move those items into the appropriate folder on a regular basis. In other words, if you are collecting something through the teachers, please check both the bin and your folder often.

The Vice President of Communications will post a bi-monthly News & Notes to the PTA website of PTA collections, upcoming events or current news in this area. You can submit items for posting ... (*section under construction*) ...

## **VIRTUAL COMMUNICATION**

Website ... email ... (*section under construction*)

## **COMMUNICATION WITH THE SCHOOL COMMUNITY**

There are three main types of communication within the school community: meeting, physical and virtual communication. To communicate at a meeting, see the above item on the agenda for your issue on an agenda. To communicate through the PTA website and/or via the PTA email network (*section to be completed by the Webmaster as the info becomes available*) or to communicate through a flyer distributed through the Monday Folders, please follow the steps below:

1. Create your document and share it with your VP for feedback
2. Make sure that your document includes the PTA logo (included in this appendix)
3. Submit the final document to the President for approval (this can be done electronically)
4. Take the document with the President's signature to the Principal's secretary

Less frequently, you may need to have something added to morning or afternoon announcements. This type of communication reaches teachers and students but does not reliably reach parents. In order to have something announced, please submit a written announcement to Ms. Perry at least 1 day before you would like it made. The announcement should include your name, PTA role, phone number and a BRIEF announcement. This type of communication should be used rarely and may not always be approved by Ms. V.

## **NAMETAGS & BUTTONS**

All volunteers and visitors to the school must sign in at the office and wear name tags. Leaders are asked to wear their "PTA LEADER" buttons at all PTA Meetings and other school gatherings. Although there are not names on the buttons, they identify PTA leaders as the "face" to the organization hopefully inspiring people to join. While the button may not answer questions about events or issues of which you have no knowledge, you are welcome to direct people to the administration or an officer for help.

## **PTA LEADER RESPONSIBILITIES**

All PTA leaders must have current PTA membership in order to serve within the PTA structure. All leaders are expected to communicate regularly with their VP or their committee to the status and needs of their projects, any calendar changes and information for PTA Meeting Notes. PTA Leaders can expect their Vice President and all the officers to provide support as needed, for implementation of their tasks.

All PTA Leaders are expected to check all draft agendas and strongly encourage participation when agenda items pertain to their responsibilities. Chairs are needed at all Board Meetings to ensure a quorum (11 of 21). Chairs may send a representative knowledgeable about the agenda to vote on their behalf.

All PTA Leaders are expected to maintain a binder of committee activities, budgets, and ideas for improvements and/or samples of all documents created. This binder will be passed on to next year's leader for training and continuity.

PTA Leaders are expected to check their committee folders in the Communication folder on a regular basis.

PTA Leaders are expected to attend an Annual Orientation session to review this year's agenda and any new policies or procedures. Veteran leaders are expected to attend to help share their experience and advice with newer leaders.

Vice Presidents are encouraged to fill open leader positions as soon as possible.

not provided by the school. (The PTA purchases its own color paper.) A written track double sided and color copies so that they can be added back to the account double charge.

Copying Process – PTA leaders use the copy machine in the workroom near the Please share it judiciously and only for PTA business. The PTA Copy Code is 8 code and make copies. Log off when you are done by hitting the access key. Log the PTA Copy Log (blue binder kept on the counter in the workroom).

Easy Steps to School-Wide Copies – Follow the directions below to expedite school wide distributions.

1. Find the Current “Organizational Chart” (copy should be in blue log)
2. Enter the copy code “86641” and press “Enter”
3. Start by making 6 copies of your original (hint: 7 is the most classes in a grade)
4. Using your 7 “originals” you are going to make groups for each class with  
Press # of copies for that grade (example: most k-classes have 23 students)  
Press the word “Sort” and then “Group” and then “Start”  
\*\* this will result in 7 groups of 23 copies
5. Repeat step #4 for each grade adjusting number of originals and copies as needed
6. LOG your copies and file by month a copy of original in the “PTA Copy Log”
7. Put the groups into the teacher mailboxes for distribution

Problem Solving – Should the copy machine require paper, you may use the stack of paper in the work room. The PTA pays for the paper based on the copies made. Should the machine break down, notify the front office. Should the machine indicate the “PTA paper”, notify Linda Perry in the front office and your Vice President. (This rarely happens)

## **FINANCIAL PROCEDURES**

Most committees have a budget. PTA leaders are expected to know their approved budget within it, and be able to account for those funds. There are several procedures in the PTA leaders work with the Treasurer in collecting and accessing funds.

**REIMBURSEMENT REQUEST FORMS** – (*under construction*) ... Reimbursement Forms are available in the Communication Center and in this appendix. Complete forms, attach receipts and submit via the Treasurer’s box. To save postage, please indicate where the forms can be left in your Communication folder. Checks are written on a regular basis and signed by both the Treasurer and the President.

**FUND COLLECTION** – (*under construction*) ... Monies Collected Forms are all

Vice President upon request. Volunteers and/or Leaders are expected to conduct communication from request to thank you with the donating entity. The thank you letters should include the value of the donation, the name of the donor and contact information with whom the volunteer worked. A copy of that letter and/or any correspondence with the tax id number is included should be filed with the PTA Treasurer. The tax id number is a valuable piece of information and should only be shared as needed.

## **VOLUNTEERS**

In the fall based on responses to the Volunteer Interest Survey, list of volunteers was compiled and distributed to PTA Leaders through their Communication Folders. It is of the utmost importance to contact all volunteers as soon as possible. Even if they are not needed, volunteers' willingness to assist should be acknowledged before the end of September.

All volunteers are required to register through the computers in the Media Center (see Wake County Policy and relatively easy.) Be sure to remind volunteers to get their background clearance before beginning their involvement.

As a PTA leader, please decide how you would like to communicate and/or meet with your volunteers. Several committees get all their work done via email while others prefer face-to-face or converse by telephone. However you decide is most effective for you is fine but please communicate that to your volunteers. The FWES Community has a large supply of Volunteers if you invite their help effectively. When possible, identify specific short-term tasks and ask for help. For example, a volunteer can make copies or staff a table or call other volunteers. If you think ahead and "chunk off" your requests, you will find many willing to help you shoulder your work load.

## **PTA ETIQUETTE**

The PTA operates to support the school and its policies. The education and safety of the children is the number one priority. In as such it is important to follow all school policies starting with the need to sign in and out at the computer in the front office and wear an ID sticker while in the school. PTA Leaders are also asked to respect teaching time, avoid classroom interruptions and limit walking through the classroom corridors. Please remember that teachers in the halls are often rushing from one activity to another. That is not an appropriate time to engage in discussion. Staff working carpool or bus times need to be completely focused on the safety of the children, please don't distract them by asking them about PTA (or any other) issues at that time.

## **POLICIES & PROCEDURES & THIS GUIDE**

The PTA is a living organization. Things change frequently and as a result, this

Thank you for being a part of that effort.

## **DOCUMENTS FOLLOWING THIS GUIDE**

BY-LAWS

ORGANIZATIONAL CONTACT LIST

PTA LOGO

DOCUMENT APPROVAL FORM

REIMBURSEMENT REQUEST FORM

MONIES COLLECTED FORM

VOLUNTEER INTEREST SURVEY