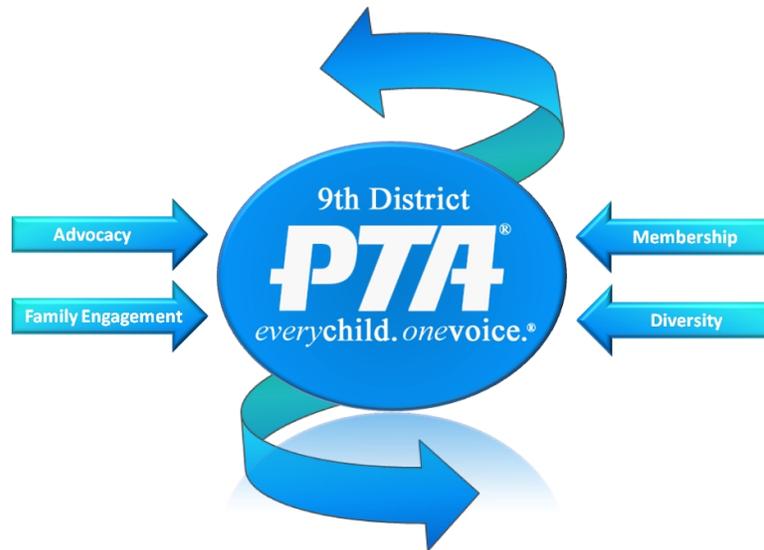


The 9th District PTA presents: "PTA 101"



Officers' Training

School of Information

2016 – 2017

PTA
everychild.onevoice.

What is PTA – Parent Teacher Association?

Established in 1897, PTA is the oldest and largest volunteer child advocacy organization in the United States. Since its founding, the National PTA and its state branches, districts, councils and local units have played an integral role in establishing, maintaining and safeguarding programs and policies that promote the health, safety, nutrition, welfare, protection and education of children and youth.

The National PTA and all of its constituent PTAs exist to achieve the purposes of the PTA and fulfill the PTA Mission.

**The National PTA Purposes, Mission, Vision and Values
are your guidelines for all decisions you make for your local unit PTA**

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; and
- 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 & spiritual **education**.

The PTA Mission:

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

The PTA Vision:

Every child's potential is a reality

PTA Values

Collaboration: We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.

Commitment: We are dedicated to promoting children's health, well-being, and educational success through strong parent, family, and community involvement.

Accountability: We acknowledge our obligations. We deliver on our promises.

Respect: We value our colleagues and ourselves. We expect the same high quality of effort and thought from ourselves as we do from others.

Inclusivity: We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.

Integrity: We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

PTA is the largest and oldest child advocacy association in the United States!

What is an advocate?

An advocate is someone who speaks for another. In the case of PTA-- ***we speak for children.***

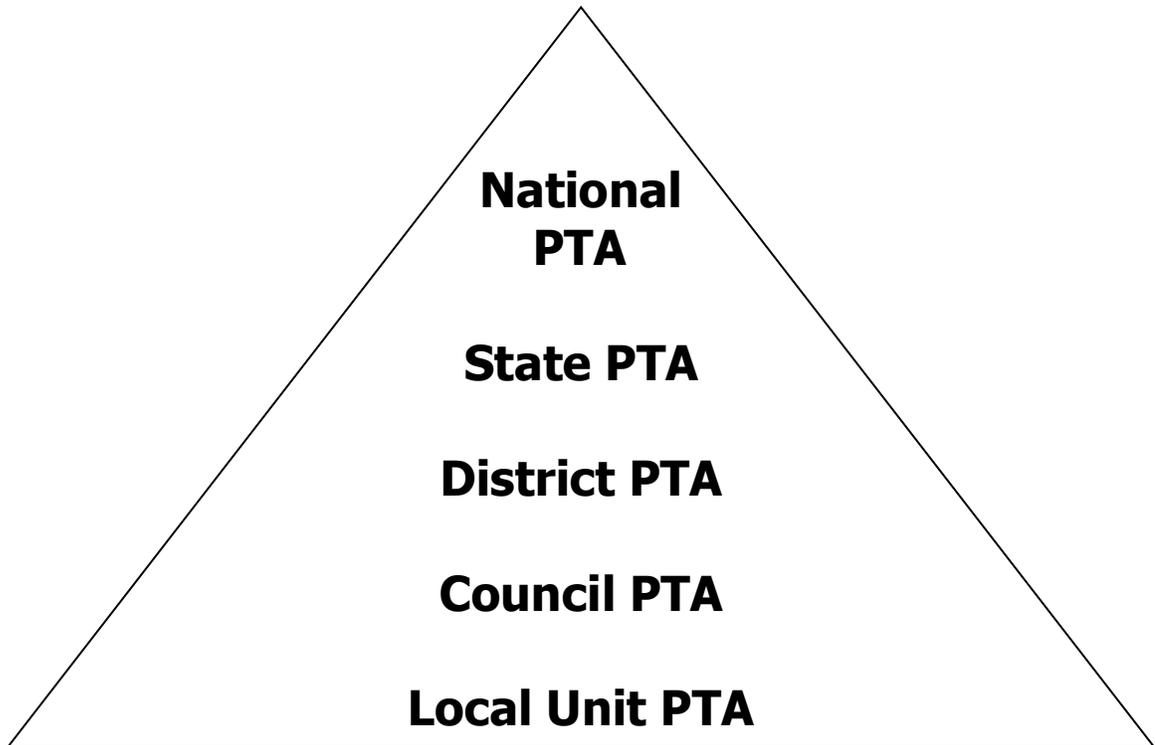
The reason our organization exists is to follow the PTA Mission and Purposes.

These direct us to always look after the health, education, safety and well being of children. Congratulations on answering the call to become a leader and advocate for the children of your local unit.

The levels of

PTA[®]

everychild.onevoice.[®]



The Local Unit PTA is the foundation of the entire organization!

Useful Websites to Bookmark:

National PTA – www.pta.org

Georgia PTA – www.georgiapta.org

9th District PTA - <http://district9pta.my-pta.org/content.asp?PageID=0>

The Levels of PTA

National PTA

At the National level of PTA, policy is set, guidelines reviewed, legislative priorities put in place and the general direction and theme for all PTAs developed. **Alice McLellan Birney**, from Marietta, Georgia, **Phoebe Apperson Hearst** and **Selena Sloan Butler** are held in the highest esteem as the founders of the modern day organization known as PTA.

Our Founders' Vision

For more than a century, PTA (Parent Teacher Association) has provided support, information and resources to families focused on the health and education of children. The organization was founded in 1897 in Washington DC as the National Congress of Mothers by Alice McLellan Birney and Phoebe Apperson Hearst. They called for action in 1897 and more than 2,000 people responded—many were mothers, but fathers, teachers, laborers, and legislators also responded—all with a commitment to children. From that first meeting in Washington, DC grew a groundswell of support. Problems were identified and strategies devised to resolve them. Through consistent hard work, sometimes after years of perseverance, the dreams became reality: the creation of kindergarten classes, child labor laws, a public health service, hot lunch programs, a juvenile justice system, and mandatory immunization were accepted as national norms. If not for these women and their vision and determination, there would not be a PTA—an association that has been woven into the very fabric of American life.

Mrs. Birney had appealed “to all mankind and to all womankind, regardless of race, color, or condition, to recognize that the republic’s greatest work is to save the children.” But in many states, segregated schools were legally sanctioned. To address those students’ needs, Selena Sloan Butler founded the National Congress of Colored Parents and Teachers in 1926. The two PTAs formally merged in 1970.

Today, PTA continues to flourish because leaders remain focused on the goal of **changing the lives of children for the better**. Though much has been accomplished, many of our children still lack the quality education and basic healthcare they deserve, and our current society presents numerous risks to their well-being. And so...our work continues.

State PTA:

Each local unit PTA in Georgia receives its charter from Georgia PTA and, therefore, is organized under its authority. Each PTA is governed by [Bylaws](#) which define its purpose, leadership, and procedures and is also subject to policies and procedures outlined in the Georgia PTA [Leadership Resource Guide](#). This guide is the “user’s manual” for PTA leadership and is a crucial resource for every officer.

The Georgia PTA:

- Sets the tone and direction for PTA activities in the state
- Conducts trainings and workshops
- Determines state priority committees
- Develops and coordinates a statewide membership drive
- Coordinates the National PTA Reflections program
- Develops legislative priorities for the year
- Provides direction and definitive answers to districts, councils, and local units
- Develops state PTA [Leadership Resource Guide](#) (LRG)
 - Defines duties of officers and chairs
 - Includes forms for membership, money transmittal, priority reports, etc.
- Trains local units upon request. Complete a [Field Service Request Form](#)

Georgia PTA Training Events

Your PTA will be stronger and more successful if you are an active participant in trainings and other events provided by the various extensions of Georgia PTA.

[Convention and Leadership Training](#) (CLT) / June 23 – 25, 2016
The Classic Center in Athens, GA

PTA Advocacy Conference / October 2016 – Atlanta

PTA Day at the Capitol / March 2017 – Atlanta

Workshops and Universities / Ongoing and pertinent to priority areas

District PTA:

You are a member of the 9th District PTA

- [Districts](#) are geographical divisions of Georgia PTA, which help integrate the work of local unit PTAs with state and national plans and activities.
- Georgia's 9th District PTA encompasses the following geographic area:
Carroll, Cobb, Douglas, Haralson, Paulding, Polk Counties & City of Marietta
- Liaison between state and all other levels of PTAs which includes communications:
 - Quarterly e-newsletter to all local unit and council leaders on file with the state office.
 - Monthly e-letter to council presidents containing important updates, information to share with local units and/or post on website, social media
 - Facebook page kept updated (9th District Georgia PTA)
 - Website (under development)
- Districts conducts two Conferences each year:
 - Fall Conference
 - Spring Conference
 - **Local unit PTA/PTSAs and Councils should send representatives to both conferences.**

- The District is available to provide training, assist in the development of new PTAs and answer questions from councils and local units.
- The District Director is elected by the district membership and serves a two-year term.

Council PTA: You are a member of one of the 9th District's 7 Councils

Douglas County Council
East Cobb County Council
Jessye Coleman Council

Marietta City Council
Paulding County Council
South Cobb Council

Tom Mathis, Sr. Council

A PTA council is a group of local PTA units organized under the authority of Georgia PTA to conduct conferences, provide leadership training, and coordinate the efforts of the local units. The Council is the direct line of support and resource to the local units within its footprint.

Councils serve to:

- Promote the Purposes and Missions of the National PTA and Georgia PTA
- Unify and strengthen local PTA units
- Promote communication and coordination between local PTA units
- Develop leadership
- Promote local membership

A Council PTA Board of Directors typically mirrors the Georgia PTA, District 9 PTA, and local unit PTAs in its organization by being made up of elected officers and Priority committee chairs.

The Council PTA's responsibilities:

- Instruct, inform, inspire, and interpret for local units
- Liaise between state and local unit
- Serve as first contact for information and questions from the local unit
- Operate within Council Bylaws
- Develop and conduct meetings and programs throughout the year:
 - **General meetings** (Three at a minimum)
 - Approve Budget – typically in late summer/early fall
 - Elect Nominating Committee – check bylaws for requirements
 - Officer Elections – check bylaws for month that meeting shall occur
 - **Officer and Priority Committee training workshops**
 - **Special programs** designed to further the PTA Mission and Purposes: e.g., scholarships, Reflections reception, Honoring Our Heroes essay contests, science fairs, Giving Tree, candidate forums, member benefits, round tables, principal and TOTY appreciation events

Council Delegates:

- Each local unit has voting delegates. These delegates are usually the PTA president(s), school principal, and one or two others depending on whether the local unit has one president or co-presidents. Local units inform its council who its delegates are using a Delegate Form early in the school year. The duties of the delegates are to 1) attend council meetings, 2) vote on behalf of their local unit, and 3) share the information learned at meetings and workshops with their local unit.

Local Unit PTA The Foundation of PTA

The PTA at the local level is a self-governing unit linked to the Georgia PTA and the National PTA. Through this linkage, the local unit is part of a nationwide network of advocates working for all children and youth. Local units provide parents, teachers, students and community members the opportunity to unite to improve children's lives by addressing health, education, and social concerns. PTA successes result from the commitment and efforts of its more than 26,000 local units. Through its own plans, programs, and activities, the local PTA strives to meet the needs of children, youth and families in its own community.

The primary goal is to follow the PTA Mission and Purposes. Every program or activity should support one of the six National Standards for Family-School Partnerships listed below. There are numerous resources available to assist local unit leaders in using the standards to design programs and then measure the success of those programs. More than 30 years of research indicate the students are more successful in their educational journey when their families are engaged. Simply put, when families are involved in their children's learning both at home and at school, their children do better in school. For more information about the research behind the summary and details on the standards, see the National PTA website page:

<http://www.pta.org/programs/content.cfm?ItemNumber=3126&navItemNumber=3983>

- **Standard 1:** Welcoming all families
- **Standard 2:** Communicating effectively
- **Standard 3:** Supporting student success
- **Standard 4:** Speaking up for every child
- **Standard 5:** Sharing power
- **Standard 6:** Collaborating with community

Additionally, here are some key points that a local unit should keep in mind when planning:

- PTA is an Advocacy organization first – not a fundraising mechanism! Money raised by the organization should be enough to cover costs of priority committee programs and the operation of the local unit. There are many opportunities provided to increase understanding of federal, state and local policies that impact education.
- Money raised by the local unit PTA belongs to the local unit and its disbursement is set by a budget adopted by the general membership at the start of the year.
- MUST operate in accordance with **Local Unit Bylaws** - this is your first resource in all things PTA! **Every member of your Board of Directors should have a copy of the**

current bylaws. This includes each officer, the Principal, the Parliamentarian and the chairperson of each standing committee. Copies of the bylaws should be provided at the very first meeting of the school year. Upon request, copies should be made available to all members.

Consult your bylaws to find the following information:

<u>Officers permitted</u>	<u>Name of Newly Elected Officers for 2016 – 2017</u>
President(s): _____	_____ _____
Vice President(s): _____	_____ _____
Secretary(s): _____	_____ _____
Treasurer: _____	_____
Month Officer Elections must take place: _____	
Number of Members of the Nominating Committee: _____	
When is the Nominating Committee elected? _____	

Then, consult your bylaws for this information: If you do not have a quorum at any of these meetings, official business cannot be conducted.

Quorum required for a meeting of the Executive Committee: _____
Quorum required for a meeting of the Board of Directors: _____
Quorum required for a meeting of the general membership: _____

The PTA Executive Committee

The **Executive Committee** consists of the elected officers, the Parliamentarian and the principal of the school (or a representative appointed by the principal to represent him or her if they cannot attend). The Parliamentarian is appointed by the president and does not have a vote.

The duties of the Executive Committee are to:

- Appoint chairpersons of the committees. Read those into the minutes.
- Approve the **Plans of Work** of committees
- Schedule board and association (General) meetings (If available, follow your school system's suggested meeting calendar)
- Approve routine bills within the limits of the budget
- Conduct the general business of the PTA
- Develop goals of the association for approval by the Board of Directors and the General Membership
- Report Executive Committee action items to the Board at each Board meeting

President(s)

The President is a key role in PTA leadership. S/he provides leadership, direction, and guidance by fostering a welcoming and inclusive environment where family engagement is encouraged and respected. Presidents also collaborate with the school and business community on events and programs, attend training opportunities to grow in the position and stay informed, and facilitate a collective vision and purpose. Presidents preside over all meetings (Executive Committee, Board of Directors and general membership) unless particular circumstances preclude his/her presence.

Vice President(s)

The vice president may be called upon at any time to assume temporarily the place of the president; therefore, s/he should study the president's duties and responsibilities and be familiar with the work of the association. In the event of the president's resignation, the vice president assumes all duties until the president's position is filled in accordance with the bylaws.

Secretary

The secretary is responsible for keeping an accurate record of the proceedings of association meetings through the minutes and making those available to the available body in a timely fashion (e.g., minutes from a Board of Directors meeting are shared with the members of the Board – not the general membership, and ideally no more than a few days after the meeting). These records are the history of the PTA. Promptness, accuracy, and knowledge of PTA policies are key to this job. The secretary should be committed to helping the president conduct a businesslike meeting.

Treasurer

The incoming treasurer should discuss with the former treasurer the status of current activities, progress made on preparing information for audit, money available for start-up costs, when to change signers at the bank, and the bylaws as they relate to the treasurer's responsibilities. While not a comprehensive list of duties, the treasurer is responsible for:

- Ensuring that the PTA's financial records are audited according to the bylaws before assuming duties;
- Having three authorized signatures on file at the bank for financial transactions including those of the president, treasurer, and the secretary as an alternate (no two check signers should be from the same household);
- Obtaining two authorized signatures on every check;

- Collecting all money from persons delegated to collect or to raise funds during a local unit activity and providing a written receipt for those funds;
- Depositing all money in the name of the local unit in a bank account approved by the board in a timely manner;
- Maintaining an accurate record of all receipts and disbursement;
- Obtaining authorization from the board before writing a check or spending money;
- Remitting, by check, all authorized bills and statements as prescribed in the bylaws;
- Submitting a written financial statement at each Executive Committee, Board of Directors meeting and general membership meeting;
- Chairing the Budget Committee and preparing the annual budget;
- Reporting income and expenses as compared with budget; and
- Preparing an annual report to be used to review PTA financial records.

Important: Section 5 of the [Leadership Resource Guide](#) provides an extensive overview of the various duties and requirements of the treasurer’s position.

Parliamentarian

Presidents can and should appoint a parliamentarian. A parliamentarian is not elected but is an important member of the executive committee, as this person works to ensure that the President (or presiding chair) follows proper Parliamentary Procedure according to *Robert’s Rules of Order Newly Revised**. The Parliamentarian also helps to make certain the organization is compliant with its bylaws and the policies & procedures of Georgia PTA as outlined in the Leadership Handbook and other guides. Although the Parliamentarian is a member of the Executive Committee, the parliamentarian does not speak to issues unless permitted by the President and may only vote when there is a ballot vote.

Please go to the Leadership Resource Guide, Section 3 for job duties specific to each office, as well as your local unit bylaws: <http://www.georgiapta.org/leadership-resources.html>

Principal

In addition to the elected officers and Parliamentarian, the school Principal or their representative is also a member of the Executive Committee, as stated in your bylaws. The Principal is an important member and makes a valuable contribution to the PTA leadership. He or she is familiar with the students and not only understands their educational needs, but very likely understands their social and emotional needs, as well.

The principal also has a wealth of knowledge about what PTA programs have and have not been successful in the past and why. Having your principal on your team is a tremendous asset.

As the head of the school, the Principal is responsible for each student’s education and safety, and should therefore be consulted on all programs, events and activities to ensure that there is no school district policy prohibiting the activity, potential to disrupt the academic criteria, or put children at risk. The Principal should also review and approve information being distributed to the school or local community including newsletters and flyers. See the Georgia PTA publication: Principals and PTA Guide at http://www.georgiapta.org/wp-content/uploads/2013/08/Principals_and_PTA_Guide.pdf

Executive Committee Meetings

Local Unit bylaws require the Executive Committee to schedule all Executive Committee meetings for the year at the first meeting. The number of meetings will be determined by the needs of the organization and its leadership but it is recommended that the Executive Committee meet at least once a month.

All Executive Committee meetings are *closed* meetings as defined by local unit bylaws and Parliamentary procedure. This means that only members of that body may attend such meetings and participate in the discussion and decisions made inasmuch as their position allows. Guests may be invited at the discretion of the President for a specific purpose, such as to present a proposed program/activity or to provide information, however, they should only be in attendance for the portion of the meeting that includes their presentation and then leave. All deliberations that take place in an Executive Committee meeting are confidential and should **never** be discussed with anyone who is not a member of that body.

Minutes are recorded for all Executive Committee meetings, however, these minutes may only be read by and distributed to members of that committee. Actions of the committee are reported at Board of Directors and general meetings, but minutes are not presented or read.

The PTA Board of Directors

The **Board of Directors** consists of the officers (elected), the Standing Committee Chairs (appointed) and the principal or a representative appointed by the principal to represent him or her. Once the Executive Committee has defined goals and identified programs, committees are needed to plan and promote the activities of the local unit throughout the year.

The duties of the Board of Directors are to:

- Transact necessary business as dictated by the members.
- Create or dissolve standing or special committees
- Prepare Plans of Work for each committee
- Report to the membership at the General meetings
- Select an auditor or an auditing committee to audit the treasurer's accounts
- Review and submit a fiscal year budget to the membership for adoption
- Approve routine bills within the limits of the budget
- Fill all vacancies of positions on the Executive Committee
- Conduct hearings for the removal from office

Local Unit PTA Structure

The members of the **Executive Committee** consist of:

- Officers
- Principal or his/her designee
- Parliamentarian

The members of the **Board of Directors** consist of:

- Officers
- Principal or his/her designee
- Parliamentarian
- Standing Committee Chairs (examples follow)
 - Arts In Education
 - Reflections
 - Character Education
 - Communications - Publications / Media /PR
 - Community Outreach
 - Dad's Initiative/Male Engagement
 - Diversity
 - Education
 - Environmental Education
 - Family Engagement
 - Health & Wellness
 - Hospitality
 - Latino/Hispanic/Asian Liaisons
 - Legislation & Advocacy
 - Membership
 - Programs
 - Room Representatives
 - Special Services
 - Volunteer Coordinator
 - Youth Services
 - Youth/Student Involvement

Standing Committees are committees that will remain in place throughout the entire year. Chairpersons of standing committees are members of your Board of Directors and, as such, factor into the number of members that are required to meet your quorum.

Special Committees conduct specific business or activities and then dissolve when the business is complete. These committees are still appointed a chairperson and are required to submit a Plan of Work, but the chair does not have a vote or factor into determining your quorum.

It is recommended that each PTA establish the following *Priority Committees*: Arts in Education; Communication; Community Outreach; Education Enrichment; Membership; Health/Youth Services; Family Engagement; Reflections and Legislation & Advocacy. These committees define the core purpose of PTA and ensure that the unit is grounded in this objective.

Section 6 of the [Leadership Resource Guide](#) provides descriptions of many committees. A Committee template Plan of Work is available [here](#) and in the LRG.

Committee chairs are responsible for the actions and activities of the PTA, including planning, communicating, and receiving board or membership approval. A committee begins with a Plan of Work for the year that includes goals, action steps, timelines, and an evaluation for each activity. Once the committee chair prepares this, it must be approved by the executive committee before the committee can take any action. The Plan of Work will also be used by the Budget Committee as they work to prepare a sound, balanced budget. General committee chair responsibilities include:

- Presenting a Plan of Work to the Executive Committee for approval;
- Providing notice of all meetings to all committee members, including the PTA president;
- Working closely with other committee chairs while possibly combining efforts, so duplication will be avoided and programs and projects will be strengthened by new ideas and manpower;
- Preparing and giving committee reports at meetings;
- Seeking Executive Committee approval before taking any action (including distribution of public notices);
- Maintaining a procedure book;
- Attending local, council, district, state, and national meetings whenever possible; and
- Giving records, reports, procedure books and other materials promptly to successors.

All Committee Chairs must be members of your PTA. The Executive Committee should establish this prior to a chair appointment. The President is an ex-officio member of every committee, except the nominating and audit committees.

General Membership

The association (**general membership**) consists of:

- All PTA members

The association does the following:

- ✓ Approves the budget and budget amendments
- ✓ Approves amendments to the bylaws
- ✓ Elects the Nominating Committee
- ✓ Elects the officers
- ✓ Adopts positions and resolutions
- ✓ Approves business of the association

In each of the above meetings, the following applies:

- ❖ Each member has only one vote
- ❖ There is **no** proxy voting (designating someone else to vote for you)
- ❖ There is **no** absentee voting – **no** email or phone call votes
- ❖ There is **no** voting or meetings conducted via closed circuit throughout the school
- ❖ Only the body who creates the minutes are entitled to the minutes of that meeting

(e.g. only members of the Executive Committee are entitled to the minutes of the Executive Committee meetings, etc.)

The District has sample agendas and scripts available for many of the business items that take place during general membership meetings, including budget amendments, bylaws amendments, elections, etc. If you would like assistance with any of those, please contact the District Director. In general, a PTA Meeting Agenda should include:

- Reading and approval of the minutes, a written document recording the business of the previous meeting
- Reading of the Treasurer's Report
- Report of officers and standing committees (as needed)
- Report of special committees (as needed)
- Unfinished business (motion that was under discussion and tabled at last meeting)
- New business
- Announcements
- Adjournment

Local Unit in Good Standing

It is important that your PTA fulfills the criteria of a unit in good standing. Any unit not in good standing is unable to participate in State and National PTA programs, such as Reflections, and is not eligible for State and National PTA grants, which are a fabulous way to expand the efforts of your PTA without excessive or unnecessary fundraising. Become familiar with these requirements and be sure that everyone on your Board of Directors is aware of these criteria as well. To be considered "In good standing", the local unit is required to:

- Submit all **membership dues** collected and have a minimum of 25 PTA members;
- Submit an **audit** by the last business day of September;
- File your **990** with the IRS by the applicable deadline and provide info to state office;
- Pay **Council dues** by due date specific in bylaws;
- Any other newly required components that may be voted on at CLT.

Consult your bylaws (Article IV, Section 3) to see this information. Note that while local units are not REQUIRED to be incorporated to be in good standing, it is highly encouraged in order to establish protection for and limit the liability of the officers and individual members. If your PTA is not incorporated, discuss this with your Executive Committee and contact Georgia PTA to get information on how to proceed. Councils ARE required to be incorporated.

Insurance

It is in the best interest of the PTA to purchase adequate insurance to protect individuals as well as the association in the instance of loss or liability. Bonding, liability, and directors and officer (D&O) insurance are recommended as a minimum coverage. Fidelity Bond insurance covers losses sustained through fraud or theft. Liability provides coverage for a PTA's legal liability arising from bodily injury, personal injury, and property damage incurred as a result of PTA activities or operations. D&O insurance provides protection for claims arising out of the wrongful acts of directors and officers who manage the affairs of the organization, such as breach of contract or mismanagement of funds. If you do have insurance, **read your policy** to understand any stipulations listed that could invalidate the policy in the event of a claim. If such stipulations are not met, a claim may be denied, so make sure you are familiar with the requirements of your insurer.

Appendix 1:

National Standards for Family - School Partnerships

For more than 100 years, National PTA has set the standard for parent and family involvement programs in school communities, addressing the needs of students and their families. In 1997, National PTA introduced the National Standards for Parent/Family Involvement, which became the blueprint for meaningful and effective PTA programs.

Working with leading experts on parent involvement and school-community partnerships, PTA has updated its National Standards for Parent/Family Involvement Programs to reflect recent research and improve parent and community involvement practices. The updated National Standards shift the focus from what schools should do to involve parents to what parents, schools, and communities can do together to support student success. To reflect this change, the standards have been renamed the National Standards for Family-School Partnerships. All PTA programs and efforts should demonstrate a determined focus to incorporate each of these standards.

Standard 1: Welcoming all families into the school community—Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

Standard 2: Communicating effectively—Families and school staff engage in regular, two-way, meaningful communication about student learning.

Standard 3: Supporting student success—Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

Standard 4: Speaking up for every child—Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

Standard 5: Sharing power—Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.

Standard 6: Collaborating with community—Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation

Appendix 2:

MODEL PTA: Your Road Map to a Successful Year

The Purposes of the Model PTA:

- Encourages and directs a Local Unit PTA to fulfill the requirements to be “In Good Standing”
- Provides a strong format and defines an effective process for family engagement, advocacy and partnership in the school community
- Assists the local school community to fulfill the parents’ rights and responsibilities under the current education legislation.

The benefits for a Local Unit in working towards Model PTA status:

- Provides a course of action to create and maintain a mature parent involvement system within the school
- Fulfilling this process leads the PTA to be a more effective and efficient school collaborator
- Accomplishing the Administrative Guidelines enables the PTA to address core issues and connect with parents on a more comprehensive level
- Increases and enhances parent and community involvement and engagement

To achieve The Model PTA status, the Local Unit PTA:

- Complete the required number of Administrative Guidelines.
- Complete the Operational Guidelines.
- Send in The Model PTA Award Cover Sheet and the completed Living Document (found on the Georgia PTA website and in this document), postmarked by the second Friday in March (or other date as communicated by Georgia PTA)

The Model PTA Living Document provides for easy record keeping, and serves as part of the local unit’s history. Keep track of your local unit PTA’s progress by filling in the completed dates for each guideline accomplished. Both the PTA/PTSA President and the Family Engagement Chair should maintain a copy of the Living Document in their respective handbooks.

Incoming Board of Directors Check List

Incoming President(s)

- Schedule a meeting with the newly elected officers.
- Appoint a parliamentarian
- Ensure that the outgoing secretary submits the names and contact information for the new officers to Georgia PTA by May 1.
- Set a date to change signatures on file at bank (with incoming treasurer)
- Plan to attend Georgia PTA Convention Leadership Training (CLT).
- Schedule meeting with principal to discuss programming, priorities, goals, calendar, etc.

Incoming Executive Committee:

- Schedule individual transition meetings with outgoing officer. Obtain procedure book, contact lists, forms, etc. Invite president as applicable.
- Appoint standing committee chairs and members.
- Appoint council delegates and alternates.
- Review local unit bylaws.
- Plan to attend Georgia PTA CLT.

Responsibilities of Officers/Chairmen

All board members are expected to:

- Accept office or position only when willing to uphold the policies and procedures of the State and National PTA;
- Accept position only if willing to fulfill the responsibilities of the position;
- Study and follow unit bylaws and standing rules;
- Attend and participate in meetings;
- Review and maintain the procedure book and files for the position;
- Abide by the will of the majority;
- Respect the privacy of the business conducted in meetings
- Protect the privacy of all members by allowing no distribution of membership lists to outside interests;
- Meet deadlines and fulfill assignments promptly;
- Give accurate and detailed account of all monies entrusted to association;
- Delegate instead of doing it all yourself;
- Develop and strengthen leadership;
- Attend conferences, workshops and conventions;
- Ensure a good transition by passing on all resources and records.