



# PRESIDENT HANDBOOK

## **Abstract**

This handbook is an introductory guide for PTA presidents and vice presidents. It contains an overview of the duties of the president and vice president and discussion of commonly assigned responsibilities. It should be used as a guide to seek out additional information and resources.

## **Audience**

Presidents, Vice Presidents

## **Washington State PTA**

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## 1. Introduction

This handbook is an introductory guide for PTA presidents and vice presidents. It contains an overview of the duties of the president and vice president and discussion of commonly assigned responsibilities.

Because of the oversight nature of the president's position, the president should be familiar with numerous resources and handbooks. This handbook is not intended to be a comprehensive resource, but will provide an outline for presidents and vice presidents of the information they need to be aware of and the resources and information they should be familiar with.

## 2. Duties of a nonprofit board member

Each elected member of a nonprofit board has three legal duties, collectively known as his or her "fiduciary" duty. A fiduciary is a person who holds something in trust for another. A PTA board is charged with holding the well-being of the PTA in trust for its members. The three legal duties are:

- **Duty of Care:** to pay attention to the organization's activities and operations;
- **Duty of Loyalty:** to put the interests of the organization before personal and professional interests;
- **Duty of Obedience:** to comply with applicable federal, state, and local laws; adhere to the organization's bylaws; and remain the guardians of the mission.

Two WSPTA resources directly address these legal requirements: *PTA and the Law*, and *Managing Your Nonprofit PTA*. *PTA and the Law* is a class offered yearly across Washington. It has accompanying resources available only through that class. One elected officer from every PTA must take *PTA and the Law* yearly, in accordance with the WSPTA standards of affiliation. *Managing Your Nonprofit PTA* is a handbook available on the WSPTA website under PTA Leader Resources. It is also a class that is commonly offered at region and/or council training. *Managing Your Nonprofit PTA* deals specifically with the financial duties of the board of directors.

## 3. Term of office

The term of office for presidents and vice presidents of local PTAs and councils is one year (July 1- June 30). No member may serve more than two consecutive terms in the same office. Officers who have served eight months in a position will be considered to have served a full term. (*WSPTA Uniform Bylaws*, Article 5, Section 6).

## 4. Duties of the president

The president is the presiding officer and the official spokesperson of the local PTA or council. The president presides at all meetings and plans the meeting agenda with the PTA secretary, utilizing input from others. The president must remain impartial when serving as the presiding officer at meetings.

With approval of the executive committee, the president makes one-year appointments to positions and committees as specified in the local PTA or council standing rules. The president should make sure that officers' names and contact information are entered into WSPTA's membership enrollment database or sent to the WSPTA office when officers are elected in the spring. Throughout the year, updates should be entered or sent to the WSPTA office whenever there is a change in officer positions or contact information. Changes in elected officers also require that the PTA update its officer information with the Corporations Division of the Washington Secretary of State.

### Resources for presidents

A president should become familiar with:

- The vision, mission, and purposes of PTA
- *WSPTA Uniform Bylaws*
- WSPTA Standards of Affiliation agreement
- Local PTA and/or council standing rules
- Basic parliamentary procedure
- PTA leader resources from the council, state, and National PTA

The president delegates responsibility and develops leaders by empowering others and acknowledging their efforts. He or she should communicate regularly with officers and chairs and be available to members. The president ensures that all officers, chairs, and committee members are current PTA members. The president serves as an ex officio member of all committees except the nominating committee. (Ex officio means "by virtue of one's status.") He or she should participate in planning and conducting an orientation for the board of directors.

The president works with the elected officers of the board of directors to establish a plan to ensure that during the PTA year (July 1– June 30), at least one elected officer attends PTA and the Law and the other elected officers attend at least one training as required in the WSPTA Standards of Affiliation agreement, to remain in good standing. He or she must attend leadership training and education and encourage other officers and chairs to attend as well.

If the local PTA is a member of a council, the president should attend council meetings with the other authorized delegate(s). It is the responsibility of the president to ensure that the local PTA participates in the business of WSPTA,

including sending delegates to the annual meeting of WSPTA at the yearly convention.

If the PTA serves a school community, the president should have a positive relationship with the principal and staff and should encourage PTA members to do the same. He or she should promote a positive image of PTA within the community. Community PTAs (for example, a district-wide Special Needs PTA) should work to develop a positive relationship with their councils (if applicable) and should connect with their school district administrators regarding goals, objectives, and resources.

To maintain the PTA's fidelity bond insurance, the president should establish a process to have the monthly bank statement reviewed, dated, and signed by a board member who is familiar with the operation of the PTA but who is not a signatory on the account. The original bank statement should be provided unopened directly to the reviewer.

The president must be aware of and communicate to the board all required deadlines for the payment of membership dues, registration for Washington State PTA workshops and conferences, submission of award applications, and filing of the PTA's annual corporation report, charitable solicitations registration, insurance renewal, and federal (IRS) informational returns.

## **5. Duties of the vice president**

The vice president's duties are to preside at meetings in the absence of the president and to act as assistant to the president (*WSPTA Uniform Bylaws*, Article 5, Section 7C).

The position of the vice president can be adapted to the needs of each individual PTA or council. Review the president's job description to determine which tasks or duties can be delegated to or shared by the vice president(s).

It is common to have multiple vice president roles on a board of directors that are each responsible for different functional areas, such as communications, membership, advocacy, or family and community engagement. How these roles are handled is set forth in the standing rules for each local PTA and council. More information about standing rules is available in the Standing Rules Handbook, available on the WSPTA website under Leader Resources.

## **6. Meetings**

The president is the presiding officer of membership and board meetings. Running a productive and efficient meeting is a skill that is appreciated by all who are

involved with the PTA. Knowing how to run a meeting properly can prevent conflict, keep sensitive information private, and save the association time and funds. The information offered in this handbook is only a summary; more comprehensive information is available under Leader Resources on the WSPTA website, including:

- *Nominating Committee and Elections Handbook*
- *Standing Rules Handbook*
- Resource documents for Robert's Rules, conflict, and many others

The purpose of a well-run meeting with clear rules for engagement is to ensure that everyone feels he or she is heard and treated fairly, that private information stays private, and that no individual exerts undue influence on the decision-making process. *WSPTA Uniform Bylaws* (Article 2 K) indicate that "Robert's Rules of Order Newly Revised" shall be the governing rules for PTA associations.

**Common complaints and issues that involve meetings are:**

- They go on too long.
- They are not productive.
- Discussion is repetitive or goes on for too long.
- One or two people dominate discussion.
- Items previously decided re-surface repeatedly for discussion.
- Boards feel they were "forced" into a decision.
- Decisions are being made for the PTA by individuals who are not on the board.

**Some things to remember:**

- Board and membership meetings are held to conduct business.
- All meetings should have a clear, written agenda.
- Brainstorming, discussion, and working out details of proposals should be done as committee work, not in meetings.
- A presiding officer must remain impartial in discussion; presidents who feel they must speak in favor of or against a topic during a board meeting should hand the gavel over to a vice president.
- During a board meeting, the president or any member of the board of directors may call for an "executive session." This session excuses all but elected board members from the room and allows the board to deal with information that must remain private. Calling an executive session is a powerful tool for meeting management that should be understood by board members. Minutes for executive sessions are taken; however, they are sealed permanently.

## 7. Speaking for the PTA

The president is considered the spokesperson for the PTA and should always represent the association in the best possible way. Presidents must remember that they are the “face” of their association; even if they are grocery shopping, others will connect their actions and behavior with the PTA.

The president of a local PTA or council develops a relationship with school or district administrators, and is the primary point of contact for communication between representatives of the school or school district and the PTA. Regular meetings should be arranged between the PTA and representatives of the school or district administration to share priorities, communicate about current events and issues, and to form a collaborative relationship.

The president also serves as the primary point of contact for the media. Often this is through routine press releases regarding events or awards. Presidents should review all press releases and send them to the appropriate media channels. Washington State PTA offers support and assistance in dealing with the media. In challenging situations, it is best to seek out support early. PTAs that need support should contact their region director.

Although the president speaks on behalf of the PTA, he or she does not make decisions or commitments on behalf of the PTA and must be careful not to give that impression. The standing rules of the local PTA will explain how decisions are made by the local PTA, but most decisions are made by the PTA membership, by the board of directors, or by the executive committee.

More resources about building relationships between the PTA and school or district administrators is available in the *Family and Community Engagement* handbook and other materials on the WSPTA website, under Leader Resources.

## 8. Needs assessment and goal setting

Before a PTA can take effective action, its board members must understand the community and people that they serve. This may be done through surveys, program assessments, personal conversations, brainstorming sessions, ad hoc committees or task forces, and more. WSPTA and NPTA have tools available to help assess existing goals and identify new ones.

Once the needs of a community have been assessed, goal setting can occur. Goals should be “SMART” – specific, measurable, attainable, relevant, and time-bound. The president should make time for goal setting and goal review to measure progress at several points over the course of the year. More information about

needs assessment and goal setting is available in the *Family and Community Engagement* handbook, or on the WSPTA website under Leader Resources.

## 9. Leader development

Term limits and the changing nature of PTA make leader development an ongoing need for every PTA. Presidents must ensure new leaders are constantly being developed for the ongoing health and well-being of their PTA. Below are suggestions for developing a cohesive, collaborative team of growing leaders:

- Hold a board retreat prior to the beginning of each school year.
- Create opportunities for board members to get to know one another personally.
- Set PTA goals as a board.
- Set standards for communication and behavior as a board (e.g.: how do people want to do business with one another, and what will the group expectations be for participation and interaction?).
- Sign board commitment forms or expectations policies.
- Be familiar with the skill sets of the individuals on the team.
- Delegate and involve others in the work of the association.
- Set an example of personal leadership development, and expect it of others.

## 10. Committees

Committees plan and promote the activities of the local PTA and council and are the mechanism through which talents and energies of the members are involved, organized, and directed into service for the benefit of children.

Standing committees conduct business year-round and are identified in the standing rules. Examples may include membership, legislative, Reflections, etc.

Ad hoc, special committees, or task forces conduct specific business on an ad hoc (as needed) basis. These committees dissolve when business is complete. Examples may include a cultural fair, t-shirts, STEM night, fundraisers, etc.

The president is an ex officio member of all PTA committees, except for the nominating committee. The board of directors, however, has oversight of all committee actions. Committees may not act without the knowledge and approval of the board of directors. One way to accomplish this is with a committee plan of action form. Committees put in writing actions that they intend to take and how they intend to use any budget resources they have been allocated. Once these plans have been approved by the board, the committees may move forward and act. If committees wish to take action that involves binding agreements (contracts, building use forms, etc.), then the board of directors must approve the agreements, and the agreements must be signed by two elected officers. Signing agreements at the end of the PTA year requires additional approvals. A sitting

board may not obligate an incoming board without membership approval (at a membership meeting).

Sample forms and other committee resources are available on the WSPTA website under Leader Resources.

## **11. Transitions**

Board officers hold a great deal of organizational knowledge about their PTA, and it is the responsibility of the president to ensure that this knowledge is passed on appropriately to new leadership. Officers should begin sharing leadership information and materials as soon as new officers are elected. Use the following guidelines to ensure a smooth transition for all outgoing and incoming officers.

- Encourage all incoming officers to attend a region conference in the fall. Remind them of the requirements in the standards of affiliation agreement.
- Share your enthusiasm and positive attitude about PTA leadership with each new officer and chair.
- Share information from WSPTA's *Leadership News* with the board, committees, and members.

### **11.1 Outgoing president and vice president(s)**

- Invite new officers and appointed chairs to a get-together with outgoing leaders (include the principal) to brief them, exchange information and records, evaluate the year and set goals for the future. Give an overview of responsibilities. Verify that new officers have copies of the adopted budget and approved standing rules.
- Send thank you notes to volunteers and/or plan a volunteer appreciation event.
- Inform members of PTA's accomplishments during the year.
- Plan an installation of the new officers.
- Share enthusiasm and a positive attitude about PTA leadership with each new officer and chair.
- Pass along hard-copy PTA materials and publications to the incoming officers or guide them through the Leader Resources on the WSPTA website.
- Encourage new officers to attend the WSPTA convention.
- Enroll incoming officers into PT Avenue membership database. Send the names and contact information of new officers to the region director and council president.
- Ask all committee chairs to return updated procedure notebooks, materials, and final reports, along with an evaluation.
- Accompany incoming officers to council or region meetings.

Check in with the treasurer to make sure:

- Books will be closed at the end of the fiscal year and submitted to the financial review committee no later than thirty days after the end of the fiscal year. (*WSPTA Uniform Bylaws, Article 5, Section 7E6*)
- Membership records must be passed on and all fees have been paid and sent to the Washington State PTA office.
- A deadline for the receipt of all outstanding bills has been set.
- The budget has been developed and approved or scheduled for approval by members.
- Names are changed on the bank signature card after the financial review is completed.

Check in with the secretary to make sure:

- All minutes are updated, completed, and distributed to the new secretary, incoming officers, and newly-appointed chairs.
- If the financial review committee was not appointed at the beginning of the year, appoint the committee now.
- Verify that the financial review committee has completed the review by August 31.
- Verify that a copy of the final membership report is printed and added to the permanent records.

## **11.2 Incoming president and vice president(s)**

Set dates to meet with new officers to:

- Set goals and plan the calendar for the next school year.
- Sign conflict of interest policy statement.
- Update committee job descriptions and appoint chairs.
- Formulate recommendations for changes to standing rules.
- Set planning meeting with school principal and staff.

Check in with the treasurer:

- Determine who the bank signers will be (PTAs should check their standing rules) and make sure that information is in meeting minutes.
- Change names on the signature cards (PTAs should be aware of requirements).
- Complete the financial review and accept the books.
- Determine whether the recommendations from the financial review have been or are being implemented.

Check in with the secretary:

- Review and update permanent records, including the legal documents notebook and the minutes notebook(s).
- Note any unfinished business.