

WA-WM PTA Council Leadership Training

President/Vice President Workshop

September 13, 2013

West Allis-West Milwaukee Council

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Who is your Board?

Executive Board

- * President
- * Vice President
- * Treasurer
- * Secretary
- * School Principal or Designee

Additional Board Members

- * Committee Chairs

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PTA President

- * Primary Contact, Leader, Manager
 - * Lead the group where they want to go.
 - * Protects Assets... Volunteer, Financial, and Image
 - * Achieve Goals... Benefit children & increase family engagement
 - * Grow membership & cultivate leadership
 - * Build a thriving, sustainable unit

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Management Tips

- * Communicate, communicate, communicate
- * Listen
- * Ask for help--DELEGATE
- * Let your committees do their work
- * You set the tone

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Conflict

Not all conflict is bad—differing opinions are needed and should be welcome. It is when differing personalities are clashing and miscommunication cause conflict.

- * Time is wasted.
- * Feelings are hurt.
- * Children pay the price for childish behavior.

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Conducting a Meeting

Sample Agenda Items

- * Call to Order
- * Pledge of Allegiance
- * Minutes
- * Treasurer's Report
- * Vice President's Report
- * President's Report
- * Standing Committee Reports
- * Unfinished Business
- * New Business
- * Principal Report
- * Teacher Report
- * Program
- * Announcements
- * Adjournment

Hints

- Don't call unnecessary meetings
- Have a purpose & communicate it
- Provided a printed agenda
- Keep time to a minimum
- Start & end on time
- Know which committees need to report
- Some items can be communicated in writing only (i.e., announcements)
- Do not conduct committee work at a monthly meeting

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Parliamentary Procedure (aka, Roberts Rules of Order)

- * Look for the e-learning course on the National PTA website (www.pta.org) under For Members, Training & Development
- * Provides order and respect for all
- * Important when introducing motions & voting
- * Quorum = the least number of people in attendance in order to vote (see your bylaws)
- * Majority Vote and 2/3 vote

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Bylaws

- * Your local unit's governing rules.
- * Need to be reviewed and submitted to WI PTA every three years.
- * Need to be available for review by the membership at least 30 days prior to voting on them.
- * Adoption of a revised set of bylaws by a majority vote at a general meeting of the association or two thirds of the executive board.

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Standing Rules

(Do we have Standing Rules?)

- * Standing Rules—relate to the details of administration and can be added and changed as needed with a majority vote for adoption, without prior notice having been given.
- * Standing Rules are unique to each unit and should be voted on annually.

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Financial Management

- * Membership approved budget
- * Appropriate use of PTA funds
- * Explain procedures to others
- * Follow procedures yourself
- * 2 signatures on checks, 3 signers at the bank
- * DO NOT sign blank checks
- * No cash payments
- * Prior approval for all expenditures

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Financial Management

- * Only President signs contracts
- * Prompt bank reconciliations, 2 sign-offs
- * Remit dues monthly
- * Audit Report
- * Timely IRS filings
- * Written treasurer reports at every meeting
- * Fundraising: Follow 3:1 Rule & have a purpose for use of funds

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Financial Management Forms

- * Reimbursement/Check Requests – used to receive reimbursement for items purchased using your allotted budget or to request payment to a vendor. Fill out separate forms for separate committees to keep line items straight.
- * Cashbox Request – used to request cash needed for specific events.
- * Cash Deposit – used to turn in money to the treasurer after an event.
 - * 2 counters besides the treasurer when used during an event.
 - * The form and money should be turned in to the treasurer the same day as the event. If the treasurer is not available money & form should be placed in the school safe until treasurer can pick it up.
 - * PTA Funds should not be taken home by a volunteer.

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Building Use Permit – *used to receive permission from the district to use premises owned by the WA-WM School District.*

- * This form is generally completed and turned in by the president. These need to be completed for meeting dates and events; and include all rooms necessary and any additional equipment that you may need to request.
- * These forms need to be submitted to the principal for approval. Upon principal approval they will be sent on to the district for the superintendent's approval.
- * Upon final approval, look for the yellow copy to be returned to the PTA. Keep copy for records.

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Outgoing Communication

- * All communication from the PTA including flyers, letters, newsletter articles, website pages, etc. must be proofread and approved by the president
- * Any information that will be distributed through the school must be approved by the building principal.
- * If you have a flyer, receive approval from the president and principal for distribution; then submit to the copy center for copies.
- * PTA Hotline is another form of communication that can be used with monthly or bi-monthly recordings. Script is written, approved by president & principal, and then will be recorded by office staff.
- * Phonemaster is another tool that can be utilize to send reminders home about PTA Events.
- * Use the school's website if you do not have your own. Use Facebook and other social media to promote your PTA

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Copy Center Submission

- * Upon approval by the president and principal, get a copy request from your school office.
- * Send original and completed copy request to the administration building via district mail. There is an envelope in the office for this purpose.
- * You may need to check with the office for the current number of families enrolled at your school.
- * If you need district-wide distribution, you must submit your flyer through the WA-WM PTA Council.

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Raffles

- * Raffles for membership in which each membership purchased received a chance to win a donated prize do not count as official raffles because the chance to win is free as a member who attended the event. All members were eligible to enter so this would fall under the category of door prize.
- * In the event that we are trying to raise money selling tickets for a chance to win a prize, we need to have a current raffle license and follow the statutes that apply
- * Not more than 60 days prior to the expiration of the raffle license, we must submit the Annual Raffle Report and Renewal Application. This is also available online at www.doa.state.wi.us/ Keyword: Raffle. All applications must include payment of \$25.00 annual fee.
- * Check the website for current information and regulations regarding raffle conduct.

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Important Information Sheet

Sheet should be kept with president, treasurer and secretary in binders passed down and kept at home. Items to be listed should include:

- * Legal name (according to IRS records) & address of unit.
- * National PTA Local Unit Number
- * Charter Date
- * EIN Number (Employer Identification Number)
- * Sales Tax Exemption Number
- * Wisconsin Registration Number
- * Corporation Number (if incorporated)
- * Copier Code (if used)

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