



The President's Guide

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The President's Guide At A Glance...

- P. 3 You have been elected to lead your PTA. The members have shown trust in you to represent them, administer the unit's affairs, conduct the meetings, and support others in their PTA work. The skills needed for PTA leadership are developed through learning and experience. Your knowledge about PTA will grow and your leadership skills will increase. This will motivate and empower others. PTA leaders should evaluate every program or project of their local unit or council by whether it advances one of the Purposes of PTA.
- P. 4 The primary role of the PTA president is to be the chief administrator of the PTA team, and the primary responsibility of the president is to build and maintain that team. A PTA president understands the Purposes and "Basic Policy" of PTA. Helping others to also learn more and do more in PTA is accomplished by the example of leadership you set. Having a team that becomes comfortable leading meetings, speaking for PTA and reaching out to the school community is the highest achievement of good leadership. Utilize the training provided by Region PTA, New York State PTA and National PTA.
- P. 5 Presidents succeed when they understand the philosophy and organization of PTA and are willing to learn more about it. They follow recommended practices and help their team meet the requirements of a unit in good standing. Successful presidents ask for advice from the Region PTA when they need it. They delegate tasks appropriately to people who have been or will be trained for the job. They give praise graciously and help find ways for all interested members to actively participate.
- P. 6 Getting off to a good start means beginning at the beginning. Find out as much as you can by reading the bylaws, meeting with the former president, reading the National PTA leadership guides and this *New York State PTA Resource Guide*, and telephoning the Region PTA Assistant Director to introduce yourself. Meet with the other elected officers (the executive committee as defined in your bylaws). Plan to attend Region PTA training opportunities with the other officers and appropriate chairs. Plan during the summer/early fall so that everyone is ready by the first PTA meeting. You need a budget, tentative calendar of PTA meetings and events, and list of possible committees to present at the first meeting.
- P.7 If the unit or council bylaws allow, co-presidents or president-elect may be chosen to lead the PTA. Co-presidents means that two people serve in one position. President-elect means that the members never vote on any candidate for the office of president but elect a president-elect and the other officers as provided for in the bylaws. Having served a term as president-elect, that person automatically becomes president the next term. Executive committee members are the officers as listed in the bylaws. They share fiduciary responsibility and administrative responsibilities for the unit or council with the president. Details on their specific duties are given in Section 3, The PTA Board.
- P. 8 As a PTA leader, you represent PTA wherever you go. You must be careful that you, and those authorized to do so, always represent the PTA accurately, fairly, and with dignity. You will want all the members of your PTA to be knowledgeable about PTA positions. The bylaws, Purposes, "Basic Policy", "Where We Stand" and position papers provide the framework to evaluate issues of local concern.
- P. 9 A good meeting results from careful planning. Copy pages 10 and 11 for everyone who may lead a meeting (the executive committee, chairs, and any others). It is important to preserve order while allowing members to participate, and to be fair, impartial and respectful. Start and end all meetings on time! Prepare the agenda carefully, and follow it. Make sure that everyone in attendance understands a report or the topic of debate, and move the group to a vote on items requiring action.
- P. 10, 11 This scripted sample agenda can be used for large PTA meetings or small committee meetings. Print a personal copy of your agenda, inserting these suggested phrases if it helps you to feel more comfortable. Allow your personal style to show. Use humor tactfully. If you find it necessary, rap only once or twice loudly with your gavel to attract attention.
- P. 12 PTAs should have a basic knowledge of parliamentary procedures to best guarantee successful meetings. Parliamentary customs are designed to help, not hinder, business. They ensure that a group's meetings are

fair and courteous and that members' rights are respected. In PTA, members must be present to listen to any discussion or debate and to cast an informed vote before any action can be taken. Your membership will recognize that their input is important, and that the PTA is not run by the small group of most-active volunteers but by the entire membership attending meetings.

- P. 13 PTA is a grassroots organization. Members come from diverse backgrounds. Controversial topics may seem to threaten an otherwise harmonious group. But people are motivated to give their time to the PTA when the PTA deals with issues that concern them - issues that deal with the needs of the children in the school and community.
- If you are called upon to lead what may become a "tough meeting", there are hints given on this page to assist you. It is always important as a PTA leader to remain objective and fair, and, as the president, to remember that your job is to control the meeting.
- P. 14 One of the most significant benefits of PTA membership is the wealth of information available and the resources provided to support the efforts of unit, council, region, State and National PTA. Use the resources listed here. They are invaluable tools, especially when shared.
- P. 15 Use of modern technology can help to make a PTA job easier. You can save a sample order for agendas on your computer and type in your details. The computer, telephone, fax machine- use whatever tools you have to your advantage. Not everyone is comfortable with a computer - don't rely on email for important notices or information. And, always use spell-check.
- P.16-19 This suggested calendar outlines the items most important to remember each month, including deadlines for membership and insurance payments. Copy these pages for all officers and chairs. Read each month's reminders before and during the month so that you are prepared. This outline should help with planning programs for PTA meetings, attending Region, State and National PTA events, and applying for awards.
- P. 20 It is easy to be a unit or council in good standing, which enables your group to benefit from membership in this, the largest child advocacy volunteer association in the nation. There are basic guidelines that we adhere to because of our not-for-profit status, and others that help us maintain that not-for-profit status. Recognizing that PTA is a private, membership association, it is understandable that we do not share our tax-exempt number or our membership list with other organizations whose purpose may be different from PTA's. We do not raise funds for other organizations - any funds we raise are intended to be used for unit or council operating expenses, leadership training, programs, advocacy, and items that meet the needs of the children in the school community. PTA members have the right to participate in decision-making on how to spend money and a right to an accounting of how it is spent.
- P. 20, 21 As you prepare to conclude your term as president, prepare for the smooth transition of leadership to your successor. Organize the PTA paperwork carefully so that all materials can be handed to the new president. Remembering how you felt as you began your term of office will help you leave with grace and style - to go out with class! Help all outgoing and incoming officers to transition also with grace and style. Celebrate your successes and welcome the new leaders who surely are willing to assume those PTA roles because of the good examples your team has set. Also remember that new leaders face different challenges, membership, and have different personal styles. Under new leadership, some things may not be done the way they had been done in the past. It is important to accept change, knowing that if new leaders are adhering to the principles that guide PTA, their work will be successful. For our entire history, PTA has been led by committed child advocates.
- P. 23 Annual Officers' Contact Information (**Form A**) should be completed by June 15th, or immediately after your election. The form should be sent electronically (go to www.nyspta.org) or mailed to your Region Director. This is the only way we know who should receive the resources to which the unit or council is entitled. This is a sample.

Congratulations on Your Election as PTA President!

You have been elected to lead your PTA! The members of the unit have shown confidence in your ability to represent them, administer the unit's affairs, conduct the meetings, and support the other officers, chairmen and active members in their work. Does this sound like a big job? It's easier than you might think, if you follow the advice in this *Resource Guide*.

To lead the PTA, you will need two types of knowledge: knowledge about the PTA (which is an on-going process of learning); and knowledge about yourself (your strengths, abilities, interests, talents, and even weaknesses). Authority alone is not enough to command respect. Respect must be earned.

Knowledge about PTA is gained by reading, asking questions, attending leadership training, and supporting board members in their roles. Knowledge about yourself builds confidence. You can receive help with leadership skills you know you want to improve by reading, asking questions, attending leadership training, and accepting the constructive input of board members as they perform their roles.

Leaders are not born. They develop through learning and experience. You will find that you will grow in your leadership position while encouraging others to grow also. Others will follow your example.

Leaders should expect acceptance, fairness, trust, flexibility, respect, and a sense of humor from one another.

Leaders strive to:

- Encourage the timid.

- Gently prod the indifferent.

- Spur the most capable to even greater efforts.

- Open up new avenues to the inexperienced.

- Lead by example, motivation and inspiration.

- Delegate as much as possible to people who you have trained for the job!

- Express recognition and thanks.

PTA leaders understand the Purposes of PTA. Before beginning any program or project, a president makes sure it advances one of the Purposes of PTA and has the potential to improve the lives of children.

PTA leaders understand that consensus is important when making decisions because more people will have a stake in making the decision work.

PTA leaders also know that it is important to assign jobs and let people do them, while supporting their efforts. Confidence in those who work with you gives them confidence in themselves and helps encourage future leaders. Others need to be there to carry on after you.

It is important to accept final responsibility.

- Stay informed, read your mail, and attend leadership workshops!

- You will benefit personally and your PTA unit, school and community will benefit.

You are a leader! Allow your enthusiasm to show! It will empower others!

The Role of the PTA President

PTA is a private, membership association governed by our bylaws, Purposes, “Basic Policy”, and the rules that govern not-for-profit, 501(c)(3) organizations.

As president, you are the chief administrator of the PTA unit or council team.

You are a person who is interested in your entire school community.

You show respect for the opinions of everyone and accept creative ideas willingly.

You are not alone. Your PTA team - executive committee, executive board, school administrators and members - stands beside you. You receive valuable information and support from the Region, State and National PTA.

You respect the office of president. You dress appropriately for meetings or public speaking engagements. You learn about basic parliamentary procedures so that you are comfortable leading the meetings. You are the presiding officer at meetings; you only vote to break a tie, and you don't voice your personal opinions during the meeting. You make sure that only PTA members vote and that votes are only taken at official meetings.

You are seen as a communicator. You will be asked to speak on behalf of the PTA from time to time. You will lead the PTA meetings. You will meet and greet new members and help them understand the philosophy of PTA.

Your primary role is to build and maintain a team of volunteers for your PTA. It's up to you to see that each person has the tools and training that he or she needs to do their job. An officer or chairman who is prepared to assume leadership will accept tasks you delegate to them willingly. Copy sections of PTA manuals, the bylaws and Procedures of the unit or council, and pass on mailings that relate to the job of an officer or chairman. Help them get any training they need, at the start of their jobs and during their term. Make sure you also attend training opportunities!

As president, you will help your PTA team understand that...

1. It's advisable that a person holds only one position on a PTA board.
2. Committee plans for the year must be approved by the executive board.
3. Issues of a personal nature (your child's teacher, a board member's problems, etc.) and complaints should be discussed privately, not during a PTA meeting.
4. School concerns of a general nature can be referred to a PTA committee.
5. When committee chairmen meet with school staff as part of their responsibilities, it is advisable that you as president attend also (or that an officer whom you have appointed attends in your place).
6. When authorized to present testimony of PTA's views, give only PTA's position. Don't elaborate or present personal views.
7. PTA supports or opposes issues, **not candidates**. This is important to remember at school board and general election time.
8. Fliers should have the name of the sponsoring group at the top. (Name) PTA, or Membership Committee of (Name) PTA, or (Name) PTA Executive Board.
9. Membership lists (names, addresses, phone numbers) and class lists are to be used strictly for PTA business. They are **not to be released** to other groups or used for any other purpose. Such lists are to be safeguarded as confidential and are to be used strictly for the PTA's own business as an organization.
10. People who no longer have children in your school can continue to be a part of your board or your membership, as can grandparents, aunts, uncles, guardians, etc. PTA is inclusive, not exclusive.
11. PTA is not a fund raising organization. Proper care should be taken in the use of funds. PTAs should not supply items that are the school board's responsibility.
12. PTA does not donate to or raise funds for other organizations. (IRS regulations)
13. Money spent by the unit/council must appear in its budget and must be approved by the membership.
14. The president should sign orders, vouchers, and/or checks as specified in the bylaws. Only the president may sign contracts.

You are a cheerleader, a facilitator, a calming influence, an agent for communication and someone who promotes understanding - a leader!

Presidents Succeed When They...

Understand PTA - its Purposes, beliefs, “Basic Policy”, and positions from “Where We Stand”. They believe in the organization and are enthusiastic about it.

Are flexible, objective, and remain calm.

Are prepared to act in difficult situations, and have prepared their executive committee to assist them at meetings to ensure that all discussions are courteous and no action is adopted without deliberation and affirmative voting.

Make each member feel welcome and help them understand the Purposes of PTA.

Spend time to learn about their new job, read their bylaws, attend trainings, and read their mail.

Telephone their Region PTA for advice.

Always make time for adequate preparation.

Delegate the work so that many can share in it.

Remember that they are the chair, not the “boss”.

Remember to say thank-you, to recognize the efforts of others, and to give praise when warranted.

Make sure that the PTA unit or council is in good standing. This means:

- Reviewing the bylaws for expiration dates. If expired or due to expire soon, call your Region PTA Bylaws chairman right away; then turn to Section 7 of this Guide to learn what to do next.
- Making sure that all necessary dues payments have been sent to NYS PTA by the required deadlines. Section 6 of this Guide describes all membership responsibilities.
- With the treasurer, verifying that the insurance premium has been paid.
- Having at least 25 members in the PTA, or 3 member units in good standing if a council.

Have filled out the Annual Officer’s Contact Information online or mailed a hard copy to their Region Director by June 15th if possible, so that they receive all the materials to which they are entitled.

Plan meetings with their team so that business is over within approximately 30 minutes, and is followed by a speaker or program of interest to the members.

Make sure that recommended PTA financial procedures (for example, having two authorized signatures on all PTA checks) are followed.

Know that most miscommunications can be resolved if all participants are shown respect and courtesy.

If necessary, ask the Region PTA Assistant Director or Region Director for advice or direct intervention through a School of Instruction.

Remember that although PTA serves its school community, only members may vote.

Remember that PTA members are advocates for children and youth. All members want to participate. They want to contribute. They want to make a difference for children.

Know that the contributions the members can make will vary widely according to their interests, talents, and available time. Enabling everyone to participate is what makes a healthy, active PTA team!

Know that their rewards will far outweigh the amount of work they do.

Getting Started

“Our members are the source of our strength. Your commitment to the education, health and welfare of all children is making a difference.... It is only when we work together that we can be truly successful. When we speak for every child with one voice we will ensure the success of the next generation. Our children are counting on us. We will not let them down.”

Jane M. Bernhard, NYS PTA President, 1999-2002

All PTA presidents accept that job because they have had PTA experience and have been recognized as a leader by their peers. They know that leadership in PTA is a process of on-going training, and that a president's primary duty is to build or maintain an effective team of PTA volunteers - one that can get things done. They know that the members who have elected them have faith in them and trust that they will help everyone work together to “ensure the success of the next generation”.

PTA volunteers begin as advocates for their own children and grow into advocates for all children and youth. They know that their contributions matter. That is why you have agreed to take on the role of PTA president!

This list will help you begin.

You've been elected!

- Meet with the out-going president as soon after the election as possible. The former president has earned much experience and can answer many of your questions. During that meeting, review the National PTA guides and *NYS PTA Resource Guide*. Ask the former president to show you the sections he or she found most helpful. These books now belong to you and you should take them home to read.
- Find out the name and telephone number of the Director and Assistant Director for your PTA region. Your predecessor should have a Region PTA directory to give you. Be sure that the Annual Officers' Contact Information (Form A), which records your name with National PTA and NYS PTA, has been entered electronically at www.nyspta.org, or was sent to your Region Director.
- Find and read the bylaws. If you have any questions, call the Assistant Director. Make sure you have the names, phone numbers, and addresses of all the elected officers of your PTA.
- Buy a notebook to keep near your telephone so that you can write all PTA messages in one place.
- Set aside a space for PTA papers. A plastic file box, filing cabinet, cardboard box, desk drawer, or shelf are fine. You will get mail and will want to have a place to keep all PTA papers together.
- Meet with the principal or superintendent to introduce yourself.

You are Chairman of the Executive Committee

- Plan a meeting with the new officers - the executive committee. Find out what they each need as they begin to plan for their new PTA jobs. Copy sections of this *Resource Guide* for them either on a disc or hard copy. For example, all sections that refer to finances should be copied for the treasurer. Each officer should also meet with their predecessor to obtain the materials for their PTA position.
- Then, meet again to start to plan the PTA year as a team. Discuss goals for the year.
- Plan a preliminary calendar for the coming year, following the guidance provided on pages 16 - 19.
- Review last year's budget and audit report. Obtain all financial records, bank account information and bank book(s).
- Plan a budget.
- Sign signature cards at the bank that holds the PTA bank account. The president, treasurer, and at least one other officer should be signers for the account.
- Review the standing committees. Read the Procedures, if you have any. The group may wish to have vice presidents responsible for specific committees, events, or activities.
- Review the upcoming training events offered by the region PTA or NYS PTA. It is important that as many members of the unit or council as possible take advantage of these opportunities to learn how to make their new jobs easier and more satisfying to do. Send registrations in on time.
- Set the date for the first PTA meeting. Write out its agenda. Make sure that everyone who should give a report is ready.
- Write a welcome letter that can be included if the school sends a late-summer mailing to parents. Give it to the principal by the end of July to read and approve for inclusion in the mailing.
- Attend the region PTA Membership Workshop if possible.
- Sit back and relax. Your year is off to a great start!

Co-President, President-Elect, Executive Committee

The president is elected by the unit/council to direct its affairs in cooperation with the other members of the executive committee for the term of office specified in the bylaws. According to generally accepted parliamentary practice, only one person may be elected to serve in any office. And, only one person can be designated as the official contact person for the Region PTA, NYS PTA and National PTA.

Co-Presidents

It is the responsibility of the nominating committee to nominate one person for each office to be filled.

Co-presidents may be nominated only if:

- the bylaws provide for co-presidents
- a search for a president has been exhausted

Co-presidents mean two individuals sitting in one seat.

The association must designate the co-president who will carry the vote of the association on issues that require the vote of the president. At board meetings only one person may preside (lead the meeting); the “co,” therefore, forfeits the right to make motions, debate, or vote. Should both “co’s” be present at a meeting, the second “co” may speak only at the discretion of the presiding officer.

Co-presidents share the responsibility of the position and are held accountable for the decisions of both individuals.

Should it be the decision of the association to elect co-presidents, very clear guidelines must be established in order to avoid confusion, controversy, and complications.

The co-president guidelines must be clear to everyone with whom they work: officers, chairmen, school staff, principal, superintendent, and PTA members. Such guidelines should be written in the association’s procedures.

President-elect

The use of president-elect may be considered as an alternative to co-presidents. However, it is a decision that must be very carefully considered.

The office of president-elect exists only if expressly provided for in the unit/council bylaws.

Once having elected a president-elect, the members never vote on any candidate for the office of president but elect a president-elect and the other officers as listed in the bylaws.

Having served a full term as president-elect, that member automatically becomes president for a full term. After electing a president-elect, the assembly cannot alter its decision regarding the succession of that person to the presidency unless the office is vacated during the term as president-elect.

When the unit/council bylaws provide for a president-elect, it is usual to provide also that if the president should be absent or if the office of president should become vacant between elections, the president-elect shall preside or shall fill the vacancy. Without such a provision, the first vice president would preside in the absence of the president and may complete the president’s term. It is also customary to provide in the bylaws for some method to fill a vacancy in the office of president-elect, should one occur between elections.

The bylaws can assign the president-elect specific responsibilities.

Executive Committee

The executive committee consists of the officers elected by the general membership of a unit and by the voting body of a council and are responsible to those who elected them.

The primary role of the executive committee is to work as a collaborative team to help plan the activities and programs of the unit or council and to perform such specific functions as are listed in the bylaws and procedures. The executive committee appoints chairmen.

The president, as presiding officer, presides at all meetings of the executive committee, which are private.

The executive committee members should learn their responsibilities as quickly as possible after their election to ensure an easy transition. Executive committee members have fiduciary responsibilities as outlined in Section 3, The PTA Board, and should take care to perform their duties with this in mind. Officers are covered by the PTA Directors and Officers insurance (as are committee chairmen).

Members of the executive committee should be prepared at every meeting to report on matters for which they are responsible. They should each maintain a binder, file box or folder for their PTA papers. Copies of the minutes, agendas, committee reports, treasurer reports, and any other items needed by the membership to be informed about the work of the PTA, should be brought to every meeting.

The executive committee appoints chairmen; the executive board approves their plans of work and creates committees.

Representing the PTA

As a PTA leader, you represent the PTA wherever you go. Whether it is the supermarket, the mall, or the school, people see you and think PTA. You cannot get away from it. If someone asks your opinion on an education-related topic, your answer will be thought of as the official position of the PTA. No matter how loudly you claim that an opinion is your own and not the PTA's, it will be interpreted as a PTA opinion.

You must be careful that you always represent the PTA accurately, fairly, and with dignity. If you do not, the PTA and, ultimately, the children will suffer.

Because you are a PTA leader, it is important that your statements actually represent the PTA position on issues. If your opinion is different, keep it to yourself. It is also important that you know when you can speak for the PTA and when you cannot.

Only the president, the executive board, or the executive committee of a PTA may authorize a member to speak for the PTA. When you do speak officially for the PTA, be sure your statements accurately represent the PTA position.

Official PTA positions may be found in many places: PTA Purposes, National PTA Legislative Program, and other National PTA printed material in many of the state PTA publications including "Where We Stand", "Basic Policy", Mission Statement and Beliefs, and in region PTA publications. When you are in doubt about a position, call your Assistant Director, the region PTA legislation chairman, or the Region Director.

It is also important to remember the basic policies of the PTA when officially representing the PTA. It is important to know, for example, that if you are representing the PTA while wearing the button of a candidate for public office, you are violating PTA's nonpolitical status and may be jeopardizing PTA's 501(c)(3) status.

PTAs will want to study issues of concern to their community and be able to speak intelligently on those issues when necessary. This is just what PTAs should do! When someone raises a concern at a meeting, take the time to research whether or not it is an issue upon which PTA already has a position. If not, and the membership or executive board concurs that the issue warrants study by the PTA, you can establish a committee to do so. Give the committee time to work and ask them to report back at a future PTA meeting. The committee should report at that meeting and present their research. If consistent with PTA policies, and worthy of further deliberation, study or action, the membership can vote on the committee's recommendations.

Presiding at Meetings

The president presides at executive committee, executive board, and general membership meetings of the PTA. If unable to attend a specific meeting, the president shall ask a member of the executive committee (usually a vice president) to preside. The bylaws describe the minimum required number of each of these meetings.

Executive committee meetings are open only to the elected officers of the association as listed in the bylaws. Guests may be invited to report on specific items, but should not attend the entire meeting. Minutes should be kept but are distributed only to the committee. These meetings may be held at a home, library, school room, school cafeteria, etc.

Executive board members are listed in the bylaws. A meeting of these members can be held separately from general membership meetings although many PTAs hold all monthly meetings as executive board meetings. In that case, the business portion of the meeting should be brief. Committee reports are given and if action is recommended, the members may vote. In those instances, a program should follow the business.

General membership meetings may be planned around special programs. A guest speaker or workshop may be sponsored by the PTA and the program may be open to a large audience. If any business needs to be conducted during this meeting, it is important to remember that only PTA members may vote.

Although the president is an *ex officio* (“by virtue of office”) member of all committees except the nominating and auditing committees, he or she does not preside at committee meetings - the committee chairman does. The president may attend all committee meetings except nominating committee.

Preparing for a meeting

Have a copy of the bylaws, procedures, minutes, budget, and Roberts Rules of Order Newly Revised at every meeting.

Reread the minutes of the last meeting. What was decided? Is there unfinished business?

Write out an agenda and make copies.

If someone may have to make a report, ask how much time he or she may need, so that you can plan the agenda and they are prepared. A gentle reminder is always welcome.

Make sure the meeting space has been reserved, and that any props needed (microphone, tables, chairs, hospitality, etc.) are reserved or arranged.

At meetings, the presiding officer shall:

- Preserve order while establishing a climate in which members feel comfortable in participating.
- Follow standard order of business with a prepared agenda. Remember that you must have a quorum (minimum number of members present, and defined in your bylaws) in order to conduct business requiring action.
- Refer to him/herself impersonally as “the chair.”
- Start and end the meeting on time.
- State motions clearly after they have been seconded and before allowing discussion.
- Maintain a fair and impartial position at all times.
- Refrain from entering discussion. Avoid personal bias when presenting information.
- Recognize members who have not spoken to the question in preference to those who have.
- Decide parliamentary questions, subject to appeal. Seek parliamentarian’s approval if available.
- Put any motions to a vote and declare the result.
- Vote when voting is by ballot or to break a tie (not advisable when vote is by voice or show of hands in order to maintain impartiality).
- Use a gavel at a large meeting and only when necessary by rapping it once or twice.
- Maintain order at all times. If order cannot be achieved, adjourn and reschedule the meeting.
- It is the responsibility of the entire group to contribute to the smooth flow of a meeting. Executive committee members should assist the presiding officer. Listening for motions, taking care of issues such as room temperature, and helping any discussions to be conducted in a respectful manner, are valuable ways the members can assist the president to lead a win-win meeting.
- Distribute any PTA materials or mail to the appropriate chairman, officer or member at the start of the meeting.
- Remember to thank everyone at the end of the meeting, and announce the date of the next meeting.

Agenda: How To Chair A Meeting

Good meetings don't just happen - they are the result of good planning.

- Be prepared; plan ahead.
- Prepare an agenda.
- Make a copy of agenda and give it to the recording secretary, who should sit next to the presiding officer. Have copies of the agenda available for those attending.
- Secretary can see what may have been skipped and quietly bring it to the presiding officer's attention.
- Stand when presiding, except when someone is reporting. When a report has been completed, stand and ask for any questions. You have better control of a meeting when you stand.

ORDER OF BUSINESS

Call to Order

President rises, raps gavel once, and calls meeting to order on time. "The meeting will come to order."

Opening ceremony (optional)

Pledge, inspirational thoughts.

Establishing a Quorum (refer to bylaws)

No business requiring action can be conducted until there is a quorum.* "We have the proper number of members present to conduct business."

Reading and Approval of Minutes

Secretary stands to read minutes - speaks clearly. "The secretary will read the minutes of the meeting" or (If minutes have been mailed, reading is not necessary.) "You have received the minutes."

Presiding officer asks for corrections to minutes.

"Are there any corrections to the minutes?"

"If there are no (further) corrections, the minutes stand approved as read (as corrected)."

Treasurer's Report

No motion needed for adoption, unless report is audited.

"May we have the treasurer's report?"

"Are there any questions? If not, the report will be filed for audit."

Correspondence

Summarized unless brief or someone requests that the entire letter be read. "Is there any correspondence?"

Correspondence requiring no action is read by secretary.

Letters requiring action are left for chair's report or new business.

Committee Reports

Executive Board

Brief report of business transacted. No action is taken.

"The secretary will report for the executive committee."

* Reports needing no action can be presented in the absence of a quorum. A quorum can be established at any time during the meeting.

Recommendations (if any) should be voted on by the membership at this time to dispose of business more rapidly.

Standing Committees

Contact chairmen of standing committees prior to the meeting. If they have reports, the reports should be brief. No motion for adoption is needed unless committee reports contain recommendations for action.

Motion is usually made by chair. Needs no second since it is a committee report.

Special Committees

Report(s) can be progress or final.
(Special committees are automatically dissolved when their work is done and final report filed.)

Unfinished Business

Minutes of previous meeting will show if any business was postponed. Secretary prepares a list of items pending. Otherwise, this is not on the agenda.

New Business

Chairmen or members may present new matters for consideration.

A motion is necessary before discussion if a vote is necessary.

Announcements

Date of next meeting(s).

Program (may also be given after adjournment)

Adjournment

No motion is necessary for adjournment.
May be adjourned by general consent.

“You heard the recommendations of the executive board. What is your pleasure?”
(Follow steps for a motion.)

“We will hear the report of the _____ committee given by _____.”

“Are there any questions or discussion in regard to this report? If not, the report will be filed.”

(Express thanks for work.)

“The _____ committee moves that the association _____. Is there any discussion?” (See “Handling a Motion”, p.12)

“We will have the report of the _____ special committee.”

“Are there any questions or discussion? If not, the report will be filed.”

(Only if there is unfinished business pending.)

“New business is now in order. Is there any new business?”

“Are there any announcements?”

“_____, our program chair, will introduce the program.”
(Thank participants.)

“If there is no further business (pause), the meeting will stand adjourned (with one tap of gavel).”

Don't rely on chance. If you are expecting a committee report at the meeting, call the chair to make sure he/she will be there. If the chair can't attend, ask that a report be sent or that someone else make the presentation. You should receive a report in writing. Keep in contact with your officers and chairmen, not to harass them, but to show you care about how their work is going.

As president, you, after all, are ultimately responsible.

Parliamentary Procedure

“Robert’s Rules of Order Newly Revised, 10th Edition” is the parliamentary authority for PTA.

Parliamentary procedure is designed to maintain order, insure justice and equality, expedite business, and enable an organization to accomplish the objectives for which it was formed. It should be used in every PTA meeting. It isn’t difficult to do and most members are not experts. The following tips will help PTA officers and committee chairmen to use parliamentary procedure effectively.

Parliamentary principles make common sense!

- All members have equal rights to introduce business, make motions, participate in discussions, and vote.
- The presiding officer should be fair and impartial.
- A majority of those present and voting decides an issue.
- Motions that limit members’ right to debate or that require notice to protect absent members (e.g. “Amend the bylaws”) require a yes vote from 2/3 of the members present and voting.
- The person making a motion has the right to speak first.
- No one can speak a second time on a motion until everyone who wants to has spoken once. No one may speak more than twice.
- Only one person speaks at a time.
- A member has a right to know what the question is before a vote is taken.
- Be sure a motion is made before discussion starts if the issue will require action. The presiding officer can ask someone to make the issue into a motion.
- When speaking in debate, personalities should be avoided. The motion can be attacked, but not the person.
- Quorum is the number of members required for a vote to be held, and is listed in bylaws. If you do not achieve quorum, you can discuss and you can have educational programs, but you can’t vote.
- Debate can be limited by unanimous consent or a 2/3 vote. Debate can be stopped by a motion for the “previous question”, which must be seconded, is not debatable, and needs a 2/3 vote. It is a good idea to set time limits before debate starts.

Use a gavel sparingly. Rapping it once or twice, loudly, should be enough to attract attention.

PTAs should vote on all important issues.

Only members may make motions, discuss, and vote. A vote should always be taken whenever there is:

- an election
- a budget to be adopted or amended.
- bylaws to be adopted or amended.
- money to be spent or allocated
- an action to be taken by the PTA

Handling a Motion

1. Member is recognized.
2. Chairman recognizes the member.
3. The members says, “ I move to...” or “I move that...”
4. Someone seconds the motion. This shows that more than one person is interested in the issue.
5. The chairman restates the motion. This ensures that everyone understands what is to be discussed.
6. Discussion is held on the motion. Alternate between those in favor and those opposed.
7. The chairman puts the motion to a vote. “All in favor, say ‘aye’, all opposed say ‘no’.”
8. The chairman announces the results of the vote. The issue is decided.

Amendments

A motion that is being discussed may be amended, by adding, removing, or changing words. Amendments must be seconded and voted upon individually before the motion itself goes to a vote.

Referring to Committee

If an issue is complex, causes lengthy debate, or is on a topic that needs research, the best course of action is to refer it to a committee for study. Ask the committee to report back to the membership by a specific date. Their report or recommendation can then be voted upon.

***Remember, the power of the
association is vested in its members!***

Chairing A Tough Meeting

PTAs are facing more and more issues about which people have very strong feelings. As a grassroots organization, the stress of conducting meetings involving difficult issues can be acute. We hope these ideas will help you.

PREPARING FOR THE MEETING

Consider having a meeting of your officers or committee members to plan the meeting. Don't plan to silence anyone – allow all points of view to be expressed.

1. Look at the issues as objectively and impersonally as possible.
2. Check PTA sources for existing positions and methods of action. This includes the State and National PTA handbooks and other publications. The issue may not require any action. Be sure you know beforehand.
3. The more current the issue, the more important it is to check with Region PTA sources for recent information. Call your assistant director, appropriate chair, or Region Director for advice or assistance. If desired, invite a region representative to the meeting.
4. Prepare an agenda.
 - List specific items you think can be managed in the time available.
 - Present a clear message to all concerned that this is what will be dealt with. If necessary, use an easel pad or blackboard to show the agenda.
 - Have a committee prepare information relevant to the issue to report to the group before the discussion begins.
5. You may wish to invite the AD (assistant director) as a resource person and guest.

READY OR NOT --

HERE'S THE MEETING HOUR!!!

Use *Robert's Rules of Order Newly Revised, 10th Edition* to your advantage.

1. Conduct the meeting as formally as possible. See "How to Chair a Meeting."
2. Be sure, as presiding officer, that the meeting is conducted impartially and fairly. If you have strong feelings that could affect your neutrality, you can have your vice president chair the meeting so that you can participate.

3. Set special rules beforehand, such as the number of times a person may speak to any one item or time limits for all speakers. The president does not have to recognize a speaker who may be trying to dominate the floor; he/she can announce beforehand that everyone will be called upon once before someone is allowed to speak again.
4. If the group continues to disagree, it might be advisable to appoint a committee to look into the issue. Don't hesitate to ask for a motion to refer to committee. Those who have expressed strong feelings should be appointed to the committee.
5. Call the issue "out of order" if speaker departs from the agenda, enters into personal comments not related to the subject at hand, interrupts another speaker, or in any way becomes abusive of any members' rights. Preserve the right of an individual to speak only as long as he/she does not abridge the rights of others.
6. Check your bylaws for any limitations or obligations concerning your PTA's activities.

Whatever happens, keep your perspective by maintaining neutrality and your sense of humor. If you do this, you can resolve the meeting peacefully and constructively. No rules can take the place of tact and common sense on the part of the chair.

The ability to lead group discussions is important. The ability to handle controversy during a meeting is sometimes a problem. Here are five helpful suggestions.

1. It's easier to handle people who belong at your meeting. In large gatherings, people who speak should identify themselves. **Only members may propose action or vote.**
2. Encourage everyone to participate. Don't let anyone monopolize the discussion.
3. Don't criticize those who speak up. A leader who does so can expect to face a withdrawn or hostile audience.
4. Prevent disagreement and antagonism whenever possible. Make the most of areas of agreement. If tempers flare, intervene or call a recess to cool things off; if necessary, adjourn and reschedule.
5. Don't monopolize discussions. Give everyone's ideas precedence over your own. **The leader is a listener rather than a talker.**

Resources For Presidents

On all levels PTA provides resources, leadership training, representation, and opportunities for participation.

Membership in the New York State and National PTA affords a not-for-profit 501(C)(3) status, which entitles PTAs to purchase tax-free materials for PTA purposes and receive tax deductible donations.

How the Region PTA serves the local unit/council:

A Directory containing the names, addresses, and phone numbers of all region PTA board members is provided.

Associate Directors and Assistant Directors (ADs) are available to provide assistance when requested.

Region PTA officers and chairmen are available to answer questions on specific topics and to provide resources.

Notice of events and issues is sent by newsletters or mailings, or appears on the region website.

Region PTAs offer a variety of conferences and workshops for local units and councils providing an opportunity for leadership training and a chance to explore the function of PTA beyond the local level. These may include:

- Fall Conferences
- Spring Conferences (annual meetings)
- Presidents/Officers Round Table
- Legislation workshops and seminars
- Presidents/Principals Dinner
- Resolutions workshop
- Membership workshops
- Schools of Instruction
- Workshops and seminars relating to various chairships and for parent education
- Region PTA Reflections Award celebrations
- Region PTA represents you on many committees, commissions, and boards of directors.
- Region PTA represents you at hearings of local government agencies and at state hearings.

At the region PTA annual meeting, you elect officers and vote on bylaw changes.

Associate/Assistant Director:

- Is a direct link or liaison with the region PTA.
- Is an advisor and confidante.
- Can explain the region PTA, how it functions, and what it offers.
- Is called on when problems arise.
- Is well informed on PTA policy and current positions.

How New York State PTA serves units/councils/region PTAs:

All presidents receive free of charge:

- A periodical - *New York Parent Teacher*, published four times a year.
- The *Advocacy Newsletter* is a periodic report to assist members in their advocacy efforts (available online).
- *Legislative Briefs...* is a monthly update on government issues that are pertinent to our children and PTA (available online).
- A newsletter, "*Fast Facts*" (available online)
- *The NYS PTA Resource Guide* (available online)
- **www.nyspta.org** is the NYS PTA website which contains many resources and up-to-date information, including links to our education and cooperating partners.

State chairmen are available to answer questions and provide information on specific subjects. They write articles for the publications.

State chairmen and officers conduct leadership training workshops at NYS PTA events and administrative awards.

NYSPTA provides a voice in Albany representing PTA concerns before the state legislature and government agencies.

Events include the NYS PTA Convention, Summer Leadership Conference weekend, and Legislation/Education Conference.

Units receive liability insurance coverage and fidelity bonding for a lesser fee than if contracted individually.

Region Directors serve on the State PTA Board of Managers and bring concerns to and information from the State PTA.

NYS PTA representatives may be invited to present Building Successful Partnerships workshops in your community.

How National PTA serves units/councils/region PTAs-

Maintains a website- www.pta.org

All presidents receive free of charge:

- Leadership guides
- Back-to-School kit
- Electronic newsletters such as PTA Parent and What's Happening in Washington

National PTA representatives conduct leadership training workshops at conferences and conventions, train Building Successful Partnership presenters and conduct the National PTA Reflections program.

National PTA provides a voice in Washington representing PTA positions before Congress and government agencies; through its resolutions, it provides a vehicle by which concerns that are national in scope can be addressed throughout the nation.

Tips for Using Tools...

Basic Agenda Outline-

Have an agenda for every meeting, including committee meetings. It tells everyone what will happen and provides you and the members with a convenient record of the meeting.

Date, time, location of meeting

Opening- Call to Order

Number needed to establish a quorum

Reading and Approval of Minutes

Treasurer's Report

Correspondence

Reports of Officers, Board and Standing Committees

Special Committee Reports

Unfinished Business

New Business

Announcements

Adjournment- including date of next meeting.

Program

or- Program, Adjournment

PTA Paperwork-

- Has to get done. Deadlines should be met, as closely as possible. Perhaps another officer can assist in some of these tasks.
- Always use the correct form and put your unit name, and unit code number on all paperwork and checks. Some forms are included in this Guide.
- Try to handle all paper only once. Distribute what should go to chairmen or other officers. A portable file box that can be carried to meetings is one way of controlling mail.
- Make lists of outstanding tasks, or "to do" reminder lists. Note the most important tasks on the lists and mark them off when they are completed. The goal of time management is to accomplish the most important things.

Telephone, Calendar, Computer-

The Telephone-

- Is a valuable tool. Use it as such.
- Put your family first. Dinner time or bedtime should be protected time. Use an answering machine. Set a time for the first call in the morning and the last call at night and stick to it.
- If a caller has a difficult question or calls at a bad time, say "Let me find out and I'll call you back". If you say this, do call back.
- Don't panic if what you hear is alarming. Remain calm and listen. Ask questions. Take notes in your phone log. Find out names of others involved and to whom you can speak. Listen.
- Return all calls within a reasonable time.
- Keep a log of all calls.

The Calendar-

- Is a PTA leader's lifeline. Keep it handy.
- Put all dates on the calendar - including family events and personal time.

Electronic Media-

- Computers can create wonderful fliers, attractive news letters, and make paperwork easy to do and keep.
- Emails are also helpful but must be used with caution.
- Not everyone has a computer or computer expertise; not everyone uses email.
- Do not rely on email to notify members of important events. Respect privacy and use email carefully.

Procrastination ("I'll do it tomorrow")

Procrastination in a leader plays havoc with logical, sequential planning and leads to hurried, last - minute decisions.

- "Divide and conquer" if you're overwhelmed by the task. Divide a large task into small, manageable ones.
- Delegate to the appropriate officers or chairmen, early and often.

Suggested Calendar

This is only a guide! Check your bylaws and procedures, and National PTA's materials.

JULY/AUGUST

1. Read the *NYS PTA Resource Guide*.
2. Make certain all materials have been turned over to new officers and chairmen.
3. Prepare budget and programs for the next PTA year with appropriate committees. Check bylaws and procedures regarding "Plans of Work."
4. Plan your membership drive; meet with principal and staff members to discuss the year's goals, plans, etc. Assign someone to attend the region PTA membership workshop.
5. Consider holding an orientation for your board members.
6. Membership cards arrive in an August unit mailing. Give them to the membership chair, who counts them and processes the Member Card Confirmation by entering the information online or sending the card to the NYS PTA office.
7. Check your bylaws. They must be approved by the NYS PTA every three years. Contact the region PTA bylaws chair for a current bylaws pattern if yours needs to be renewed.
8. Order the *New York Parent Teacher* for your officers, board members, principal, teacher representative, and/or faculty room.
9. Unit treasurer files signature cards with bank, if necessary.
10. Make sure Annual Officers' Contact Information (Form A) was sent to the Region PTA Director or entered electronically.

SEPTEMBER – MEMBERSHIP ENROLLMENT MONTH

1. Start your membership campaign.
2. Set dates for executive board and general membership meetings if not already done.
3. If possible, present proposed budget to executive board for approval before presenting to the membership for adoption at the first general membership meeting. If not, prepare to present it at the first meeting and to answer any questions that may arise.
4. Chairmen report on their plans for the year; executive board must approve plans before work begins.
5. Remind board members that PTA is tax exempt; give them number and form to use when making approved PTA purchases.
6. Review convention packet and resolutions with members so that delegates can truly represent your PTA at convention.
7. Vote to send representatives to the state convention.
8. Share Reflections information with appropriate chairman and persons in your school.
9. Encourage members to attend the region PTA fall conference (if held) and preregister them.
10. Remind all board members that they must be members of the unit.
11. Submit articles to the newsletter editor on a regular basis.
12. Review awards and scholarship deadlines.
13. Send your region PTA assistant director (AD): names of officers and chairmen; bylaws; budget; newsletters (throughout the year) and program fliers (throughout the year).

SEPTEMBER/OCTOBER – GENERAL MEMBERSHIP MEETING – OPEN HOUSE

1. Membership dues are collected.
2. Treasurer presents budget to the general membership for adoption.
3. Present report of audit committee if specified in bylaws.
4. Consider electing nominating committee members from the general membership at this time.
5. Treasurer must send first dues payment to the state PTA office before November 1. This covers state and national dues. Dues are not considered part of your treasury- they belong to NYS and National PTA.
6. Consider sending a representative to a NYS PTA PARP workshop.
7. Continue membership enrollment.
8. Send registration(s) for convention.
9. Attend the region PTA's fall conference (if held).
10. Publicize Twin Projects (Jenkins Memorial Scholarship and NYS PTA Teacher Fellowship for Graduate Study) in your newsletter. Check the NYS PTA website at www.nyspta.org for deadline information.
11. Check that guidance counselors have received the information and remind high school students to apply for Jenkins Memorial Scholarship. Information is sent on or about November 1 to all public high schools that have at least one PTA unit in their school district. Give unit code # to guidance counselor for Jenkins Scholarship application.

NOVEMBER

1. Continue membership enrollment. Send dues to the state PTA office regularly on proper forms.
2. Attend State PTA convention. Afterwards have delegate(s) report to your members and include report in your newsletter. Decide on priorities for action.
3. Celebrate American Education Week.

DECEMBER

1. Continue to enroll members and send dues payments to state PTA office.
2. Make plans for Founders Day observance in February.
3. Appoint a committee to consider a recipient for an Honorary Life Membership.
4. Check bylaws to see when your nominating committee should be elected if you have not done so already.

JANUARY

1. The State Legislature reconvenes early this month. Carefully read all Region, State, and National PTA legislation materials. Plan for any action.
2. Finalize plans for Founders Day. Invite your past presidents to be part of the program.
3. Be sure your nominating committee is elected in accordance with your bylaws.
4. Reflections entries should be submitted to your region PTA according to its deadline.

FEBRUARY

1. Celebrate Founders Day, February 17.
2. Continue legislative activity.
3. Check bylaws to determine when nominating committee reports.

4. Continue enrolling members and sending dues payments to state PTA office.
5. Check the NYS PTA website at www.nyspta.org for appropriate award information and deadlines.

MARCH - PTA ADVOCACY MONTH

1. Attend Legislation/Education Conference.
2. All dues must be in the state PTA office by March 31 to be counted for awards. Return unused or voided membership cards to region membership chairman by the 31st.
3. Plan for Teacher/Staff Recognition Day.
4. Plan meeting to review and discuss the proposed school budget.
5. Plan an open community forum to meet and hear candidates for the school board. (Refer to PTA and School Board Elections.)
6. Plan and participate in an Advocacy Month activity.

MARCH/APRIL – GENERAL MEMBERSHIP ELECTION MEETING

1. Nominating committee report is presented.
2. The election is conducted in accordance with the bylaws.
3. Remind teachers that applications for the NYS PTA Teacher Fellowship for Graduate Study are available after April 1 from the NYS PTA website at www.nyspta.org or by calling 1-877-569-7782.

APRIL

1. Decide on delegates to attend the region PTA's spring conference (annual meeting) and pre-register them.
2. Send proposed convention resolutions to state PTA office prior to the 15th.
3. Appoint audit committee or auditor according to bylaws if you haven't already done so and remind members to submit bills before audit.
4. Watch for mailings for region/state summer workshop(s). Plan to attend.
5. Insurance will be billed to each unit by the NYS PTA; payment is due before June 1.

MAY

1. Attend the region PTA's spring conference (annual meeting).
2. Fill your chairmanships according to your bylaws.
3. Remind members to vote on the school budget and school board election.
4. Fill out the Annual Officers' Contact Information sheet online (preferred) at www.nyspta.org or mail the printed form to your Region Director immediately following election. This is a bylaws requirement.
5. Remind chairmen and officers to have procedure books and PTA materials ready to transfer to their successors. These are the property of PTA.
6. Recognize your teachers and staff on Teacher/Staff Recognition Day.
7. Plan to attend the Presidents/Officers Round Table. If you are an outgoing president, be sure to inform the new president about the workshop.
8. Remind teachers about deadline for NYS PTA Teacher Fellowship for Graduate Study applications.

MAY/JUNE – ANNUAL GENERAL MEMBERSHIP MEETING

1. Hold annual meeting in accordance with bylaws.
2. Present report of audit committee as specified in bylaws.
3. Officers and chairmen give annual reports.
4. Installation of officers can be held. Invite a region PTA official to install new officers.

JUNE

1. Call a joint meeting of outgoing and incoming executive committee and executive board.
2. Attend the Presidents/Officers Round Table sponsored by the region PTA or your council.
3. Go through your files and share any other necessary information with the new president.
4. Set up a committee to prepare the budget for the next year. Be sure to budget for insurance and subscriptions to the New York Parent Teacher, PTA region functions (workshops, conferences, Presidents/Principals Dinner), and NYS PTA events (Summer Leadership Conference, Convention, the Legislation/Education Conference).
5. Set up a calendar for the coming year:
 - Check the bylaws for required meetings (month for adoption of budget, election of nominating committee, election meeting, and annual meeting).
 - Consult with the administrator to be sure there are no conflicts between school or district programs and PTA functions.
 - Newsletter publication dates should precede programs/activities in order to publicize them.
6. Have a budget meeting and include the treasurer as chair, the ways and means chair, and the membership chair. They must plan and work together to fund programs and activities, leadership training and attendance at PTA conferences.
7. Plan programs:
 - Meet with appropriate chairmen, administrator, and teacher representatives.
 - Review goals for the year and discuss long-term goals.
 - Request input from board members about ongoing projects and activities.
8. Discuss and plan fund-raisers if necessary.
9. Order the following for officers and chairmen: region PTA newsletter, *New York Parent Teacher*, and National PTA's *Our Children*.
10. Check expiration date of bylaws. If bylaws have not been revised in more than three years, select a committee to review and update them as necessary. Bylaws must be submitted to the region PTA bylaws chairman 90 days prior to expiration date.
11. All outgoing officers and chairmen should turn over materials and reports to incoming officers and chairmen.
12. Check Section 10 of this *Guide* and our website at www.nyspta.org for appropriate award information, deadlines and current fees.
13. **Make sure you submit your name and contact information on the Annual Officers' Contact Information sheet (Form A) preferably on-line through www.nyspta.org OR by hard copy sent to your Region Director. This information tells National PTA, NYS PTA and your Region PTA where to send important documents, including membership cards, insurance certificates, and leadership guides.**

Remember...

It's easy to be a PTA unit or council in good standing if you and your PTA team pay attention to the simple rules all PTAs are required to follow. Don't hesitate to ask for help from an Assistant Director, chairman, or the Director from your Region PTA. They are experienced PTA leaders who have volunteered to help. If a unit or council is not in good standing, this may impact students and individual members as well as the unit, disqualifying them from awards or events.

Consult the principal/administrator before publicizing PTA activities in the school. Make sure that the principal reads through any fliers or materials that are intended to be distributed in the "backpacks". The principal or administrator is ultimately responsible for everything that is sent home from the school, and he or she should review all materials. If information is misquoted, he can alert you and work with you to ensure that communications are timely and accurate.

If contacted by the media, request person's name, whom he/she represents, and the reason for the call. Take the time to be sure your answers are accurate and are according to PTA policy, **not** your opinion.

A unit/council tax exempt number legally cannot be used by other groups.

Remember, PTA does not donate to or raise funds for other organizations. (IRS regulations)

Repeat meeting and program agendas to reach parents who are working, if possible. Provide child care. Have community, Region PTA, NYS PTA and National PTA resources available.

Expect membership turnover, as in any volunteer organization. Training of PTA leaders is an ongoing activity. Take advantage of fresh ideas and the enthusiasm of new members.

Do try to reach out to new members. Don't run your PTA as a clique. Extend special invitations to new families, neighbors, and former members who are not as active as they used to be. Do invite someone from the region PTA board to attend a meeting. They can bring NYS PTA to your members who may never be able to attend a region, state or national event.

Those who pay dues have a right to participate in decision-making on how to spend money and a right to an accounting of how it is spent.

Membership lists (names, addresses and phone numbers) and class lists contain confidential information. They are to be safeguarded to protect the privacy of PTA members and students. They are to be used strictly for the business of PTA as an organization. Thus, they are not to be used to disseminate or advance personal viewpoints. They are not to be released to other groups or used for any other purpose. Lists should not normally be shared with members or committee chairs, except as may be strictly necessary to conduct the business of PTA.

Going Out With Class

The health of the PTA depends upon recruiting new leaders and helping them move up the ladder of leadership. The nominating committee is the most important committee in PTA. Make sure it has been elected early and is given all materials necessary. You as president do not sit on this committee, although you can offer confidential, written recommendations (as can all PTA members). Make sure that your members know who is nominated at least 30 days before the election. Then, make sure that the election is run according to the bylaws and practices cited in the Nominations and Elections found in Section 7 of this *Guide*.

As you prepare to conclude your term as president, prepare for the smooth transition of your successor. Remember how you felt as a beginner? Your successor may have different concerns and style of leadership, but needs your support to get off to a good start.

- Organize and transfer all PTA materials promptly. Throw out items that are no longer relevant, useful or timely.
- Make sure that your successor has this *Resource Guide* and that you review this section with him or her.
- Submit the Annual Officer's Contact Information to your Region Director.
- Help all officers and chairmen to follow your example in transferring materials. Plan a meeting with new and outgoing officers.

Once the new leaders begin, take a giant step back. Help when asked, but allow the new leaders to learn and flourish as you did.

Celebrate the successes of your unit or council. Thank everyone for their contributions. They will surely thank you for your hard work. If you feel that you are able, you can continue to be active in PTA by working with the Region PTA. Regions are constantly seeking talented and motivated PTA leaders who understand the organization and are interested in furthering its achievements outside their own community. Discuss available options for continued participation with the Region Director.

Presidents of the New York State PTA

Fannie Barnes, New York -----	1897-1898	Jeanne Springer, Babylon -----	1956-1959
Mary Mears, Albany -----	1898-1905	Jane Cobb, West Sand Lake -----	1959-1962
Ina Merrell, Syracuse -----	1905-1907	Elizabeth Mallory, Endicott -----	1962-1965
Lillian Whish, Albany -----	1907-1911	Ruberta Foster, Pittsford -----	1965-1968
Nellie Eldredge, Rochester -----	1911-1913	Alice Willett, Syosset -----	1968-1971
Isabelle Holland, Buffalo -----	1913-1917	Helen Vandermosten, Oceanside -----	1971-1974
Belle Saltford, Poughkeepsie -----	1917-1920	Edna Polin, Andes -----	1974-1977
Marie Holley, Lockport -----	1920-1923	Eris Thompson, Indian Lake -----	1977-1980
Caroline Hosmer, Auburn -----	1923-1926	Joan Ball, Spring Valley -----	1980-1983
Carolyn Weaver, Buffalo -----	1926-1928	Marvin Fretwell, St. James -----	1983-1986
Belle Saltford, (Acting President) -----	1928-1932	Mary Ann Parker, New Hartford -----	1986-1988
Lena Stevenson, Watertown -----	1929-1932	Sheila Cohen, Freeport -----	1988-1990
Dorothy Blake, Albion -----	1932-1935	Helen Liebowitz, White Plains -----	1990-1993
Elizabeth Brodie, Albion -----	1935-1938	Carol Buyakowski, Hopewell Junction ---	1993-1996
Mildred Brister, Auburn -----	1938-1941	Carolyn Fiori, Massapequa -----	1996-1999
Doris Pratt, Williamsville -----	1941-1944	Jane M. Bernhard, Poughkeepsie -----	1999-2002
Margaret Jenkins, West Hempstead -----	1944-1947	Penny Leask, Rochester -----	2002-2005
Helen Rowe Newell, Rochester -----	1947-1950	Maria DeWald, Clinton Corners -----	2005-2008
Mary Chapman, Lewiston -----	1950-1953	Susan Lipman, West Islip -----	2008-
Martha Fallon, Bronxville -----	1953-1956		

“My fondest memories are of the wonderful dedicated people I worked with - and the friends who were so kind. I think of them often....”

Edna Polin, NYS PTA President, 1974 -1977

ANNUAL OFFICERS' CONTACT INFORMATION (FORM A)

You must complete and submit this form ***every year*** to verify your PTA contact information. In order to receive future mailings from New York State and National PTA, please complete this form electronically on the NYS PTA website (www.nyspta.org) or return a printed copy to your Region Director by ***June 15***.

UNIT OR COUNCIL ID # ____ - ____ UNIT OR COUNCIL NAME _____
SCHOOL DISTRICT _____
NUMBER OF BUILDINGS RELATED TO THIS PTA: ____ [SEPTAS AND COUNCILS ONLY INSERT (1)]
DO YOU FILE A 990 FORM WITH THE IRS? YES ____ NO ____
FEDERAL EMPLOYER IDENTIFICATION NUMBER ____ - ____ - ____

Enter one name only. This person will receive ALL NYS PTA and NPTA correspondence

NAME OF PRESIDENT 20__-20__ _____
HOME ADDRESS _____
CITY _____ NEW YORK, ZIP _____
TEL (_____) _____ EMAIL _____

Insert the name and address of Treasurer

NAME OF TREASURER 20__-20__ _____
HOME ADDRESS _____
CITY _____ NEW YORK, ZIP _____
TEL (_____) _____ EMAIL _____

Insert the name and address of Co President or an alternate contact

NAME _____
CO PRESIDENT _____ SECRETARY _____ OTHER _____
HOME ADDRESS _____
CITY _____ NEW YORK, ZIP _____
TEL (_____) _____ EMAIL _____