



BOARDSMANSHIP

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Effective Function of PTA Boards



PTA Mission

■ PTA is

- A powerful voice for all children
- A relevant resource for families and communities, and
- A strong advocate for the education and well-being of every child



PTA Structure

- ❖ Local units . At the school level, advocacy occurs in the immediate school community
- ❖ County Councils . Support to Local PTA given in form of information, training, resources, advocacy at the county level



PTA Structure Continued

- ❖ Maryland PTA. Support to all County Councils and all Local PTA Units (over 900) given in the form of information, training, resources, and advocacy at the Maryland State Government level
- ❖ National PTA - Support to all State (55 Congresses), County Councils and all Local PTA Units given in the form of information, training, resources, and advocacy at the National Government level




Local PTA Leadership

- Executive Committee . Consists of all officers as defined by current bylaws.
- Board of Directors . Consists of the Executive Committee (all officers) and other members as defined in your bylaws.
- Committee Chair . Committees are determined by the Executive Committee and serve to meet the PTA goals. There are no Co-Chairs in PTA. Committee Chairs as voting members are required to attend Board of Directors meetings.



County Council PTA Leadership

- Executive Committee - Consists of all officers as defined by current bylaws.
- Board of Directors - Consists of the Executive Committee (all officers) and other board members as defined in your bylaws constitute voting members of the Board.
- Committee Chair - Committees are determined by the Executive Committee and serve to meet the County Council PTA goals. There are no Co-Chairs in PTA. Committee Chairs as voting members are required to attend Board of Directors meetings.



County Council PTA Leadership Continued

- Local PTA Delegate - Voting member of council. Expected to attend general monthly meetings. Represents the Local PTA and brings information back to the local unit from the County Council by reporting at local PTA meetings.



Tools of Governance

- Bylaws
- Standards of Affiliation
- Roberts Rules of Order
- Goals
- Meeting Agenda
- Budget . IRS Tax forms
- Legislative Platform - Advocacy



Bylaws... Bylaws... Bylaws...

- All Board Members - Officers and Chairs must read to understand the Bylaws that govern the PTA you serve.
- Bylaws are the general rules of operation for any PTA.
- PTA Bylaws are required to be reviewed and approved every three years in Maryland.

PLUS:



More... Bylaws... Bylaws...

- Local, Council, and State PTA sometimes use adopted Standing Rules to give more guidance to particular situations. These are voted on by the Board of Directors and assist future boards.
- Other resources utilized are National, State, and County Council guides, most are available on-line or by contacting that particular branch of PTA.



Standards of Affiliation

- Adhere to the purposes and basic policies of the National and Maryland PTA;
- Remit the national and state dues to the Maryland PTA office by dates designated;
- Have bylaws approved every three (3) years according to the procedures of Maryland PTA;
- Have a minimum of twenty-five (25) members;



Standards of Affiliation Continued

- Shall Submit the names and contact information including phone number, address and email address of all elected officers to the Maryland PTA office within two (2) weeks of their election.
- Remit bonding, liability and directors and officers insurance premiums by the date designated;
- Have an EIN (Employer Identification Number) from the Internal Revenue Service (IRS) on file with the Maryland PTA;



Standards of Affiliation Continued

- Maintain its status as a corporation , have as required by MD Non-Profit law, at a minimum a president, secretary and treasurer and
- Files the appropriate tax forms, by the required dates, with the IRS and submits a copy to the Maryland PTA office within 30 (thirty) days of filing.
- Each local PTA shall submit a copy of its annual financial review, to Maryland PTA within one hundred twenty (120) days following the end of the local fiscal year.



Standards of Affiliation Continued

- Files all appropriate state forms with the appropriate state authorities by the required date and submit a copy to the Maryland PTA office within 30 days of filing.
- Sends at a minimum two (2) board members, one of which is the treasurer, to be trained by Council, Maryland PTA or National PTA within 180 days of taking office (December 31). Training must include the financial training regarding the required Maryland and IRS tax forms.



Roberts rules of order

Parliamentary Procedure- essential and valuable for the following reasons:

- ✓ PTA business must be handled efficiently and logically allowing for organized discussion and respectful debate.
- ✓ The majority wins but should be properly sought in open transparent discussion.
- ✓ The rights of the minority are protected and respected by allowing for open discussion and expression with respect and thoughtfulness to opposing views.



Goals

■ A goal is:

- ❖ An optimistic and positive view of what could be
- ❖ A statement containing things that are easily measured
- ❖ A demand for action and planning
- ❖ A clear straightforward statement in simple language.



Meeting Agenda

- The agenda is the President's responsibility to create but all must review and approve as the work of the board. The President should send this to board members prior to the meeting.
- Start on time and End on time! This is the responsibility of the entire board all should stay on task and relevant to the work at hand.
- Leave your own personal agenda at the door.



Meeting Agenda Continued

- Review the agenda and all material pertinent to the work outlined on the agenda before you go to the meeting if they are available to you. This way the board can do the work without needing to review the material at the time of the meeting.
- All PTA meetings must have quorum as stipulated in the bylaws to conduct business. No action can occur without the appropriate number of voting members required.



Financial Responsibilities

- The PTA budget should support the PTA goals established.
- PTA fundraising should be done to meet the goals (3:1 general rule= 3 non-fundraising events for each fundraiser).
- “*Cash Encounters*” handbook is a great reference for help.



Financial Responsibilities Continued

The Treasurer has primary responsibility for filing forms but all Board Members should review or at least be aware of:

- ❑ Financial Review (audit) report –Oct 1
- ❑ New bank signature cards updated
- ❑ Membership dues sold sent monthly to MDPTA
- ❑ Council Dues (\$170 – by Nov. 1)
- ❑ November 15th - IRS Form 990/990EZ/990N

And...



Financial Responsibilities Continued

- ❑ December 31st . Charitable Organization registration renewal
- ❑ March 31st - MD/Natd PTA membership dues since last payment. All Standards of Affiliation must be completed by this date to be eligible for Membership awards and voting credentials at convention.
- ❑ April 15th . PTA's Personal Property Return is due to the Maryland State Department of Assessments
- ❑ July 1st - Pay insurance premium
- ❑ For a full listing please review the Maryland PTA website or PTACHC website



Advocacy

- ❖ National PTA Legislative Platform
- ❖ Maryland PTA Legislative Platform
- ❖ County Council PTA Advocacy efforts
- ❖ Local PTA Advocacy efforts

“Making every child’s potential a reality.”



Board Member Qualities

Include but not limited to:

- Integrity
- Vision
- Ability
- Interpersonal Skill
- Open Mind
- Knowledge
- Creative Thinking
- Supportive
- Enthusiasm



Board Member Role

- accept responsibility
- participate at meetings
- know the mission of PTA
- know the purpose of PTA
- recognize differences
- respect differences
- understand the budget



Fiduciary Responsibilities:

To the PTA, the Board, and to
all Members-

- Duty of Obedience
 - Duty of Loyalty
 - Duty of Care



Duty of Obedience

Board Members are not permitted to act in a way that is inconsistent with the central goals of the association.

- The duty of obedience requires board members to be faithful to the association's mission.
- A basis for this rule lies in the public's trust that the association will manage donated funds to fulfill the association's mission.



Duty of Loyalty

This means that a board member can never use information obtained as a member for personal gain, but must act in the best interest of the association.

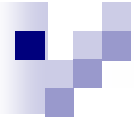
- The duty of loyalty is a standard of faithfulness; a board member must give undivided allegiance when making decisions affecting the association.



Duty of Care

This means that a board member owes the duty to exercise reasonable care when he or she makes a decision as a steward of the association.

- The duty of care describes the level of competence that is expected of a board member and the duty to set in good faith, the best interest of the association.



A cohesive Board


WORKING TOGETHER

Maryland
PTA[®]
everychild.one voice.



10 Responsibilities of Board Members

- Follow the PTA Mission and Purpose
- Elect and support the President
- Ensure Adequate Resources
- Manage Resources Effectively
- Ensure Effective Planning
- Determine Board Effectiveness
- Understand your job and responsibilities
- Membership
- Accountability
- Continued Board Development



1

Follow the PTA
Mission and
Purpose:

- The reason why PTA exists
- Understand the mission and purpose
- Work toward common goals in a team effort



2

Elect and Support the President:

- Make sure there are guidelines in place to elect the best possible candidate for the office of President.
- Presidents do not try to do it all, assign jobs and look for others to help.
- Regular attendance at meetings- If you are unable to attend let your President know in advance . it is common respect and courtesy.
- You do not need to be friends, but it is important to demonstrate respect and understanding for the authority of this office. How would you want to be treated?



3

Ensure Adequate Resources:

- Financial - support appropriate fundraising, review the year end financial report and annual budget.
- Review budget requests from Committee Chairs and other requests.
- Volunteers . make sure that they have the training and resources required to do the task.
- Make sure that there are adequate volunteers to meet the goals of the organization.



4

Manage
Resources
Effectively:

- Financial review of the budget use for efficiency and adequacy prior to meetings and with each report filed by the Treasurer.
- Volunteer review reports from committee chairs and the plan of work filed in the beginning of the year for accuracy and ability to attain the goals set.
- Re-evaluate financial and volunteer requirements in order to meet goals.
- Delegate as needed.



5

Ensure Effective
Planning:

- Program oversight but
Do not micromanage!
- Approve Committee
Plans of Work and
monthly reports.
- Determine, Monitor, and
strengthen programs and
services.



6

Determine Board Effectiveness:

- Does the board resemble the community it serves? Is it culturally representative? Are there men and women represented?
- Is its goals appropriate? Goals need to be desired and attainable.
- Does the community support the PTA? If ~~no~~ evaluate. Why?
- Is the PTA transparent and relevant to the purpose, mission, and goals of the PTA in conjunction with the community. *“What’s In It For Me”?*



7

Understand Your Job and Responsibilities:

- Look at your job description if there is one.
- Read and familiarize yourself with the PTA Bylaws for a basic understanding of your job as well as other board members.
- Have an exit interview with the person you are taking over for or with the person taking your position.
- Get the existing binder or notes . ask for it.
- If it is a new position or there is nothing given to you talk with the President and Executive Committee members to get a list of expectations for your position.



8

Membership:

- Membership is everyone's business.
- PTA is a membership based association not a clique or a private club. Everyone is welcome to join!
- Enhance PTA public image. As a board member model appropriate behavior in person, in writing, in email, and in all social media.

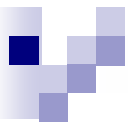


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Accountability:

- ❖ Ensure legal behavior
- ❖ Ensure ethical behavior
- ❖ Maintain moral behavior

- Make sure that all Board Members are held accountable for their behavior.
- Discuss concerns with the individual first.
- If there continues to be a concern discuss with the President and Executive Committee.
- It is imperative to maintain privacy and confidentiality of individuals and the board as it pertains to legal and ethical concerns.



10

Continued Board Development:

- ❑ Recruit New Board Members
- ❑ Orient new board members
- ❑ Assess board performance
- ❑ Participate in training
- ❑ Evaluate the needs of the Board
- ❑ Re-Evaluate



Effective Board Characteristics

- ✓ The leadership is appropriate
- ✓ Members have confidence in their leader
- ✓ Growth and welfare of all members are considered
- ✓ Goals are clear and shared by all
- ✓ Group goals are compatible with individual goals
- ✓ Communication is open, frank and non-threatening



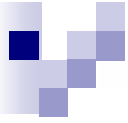
Effective Board Characteristics Continued

- ✓ There is a sense of agreed priorities
- ✓ Resources of members are used satisfactorily
- ✓ Goals are high but achievable
- ✓ Decision-making procedures and authority are appropriate
- ✓ Conflict is dealt with openly



Team Player

- Come prepared
- Arrive on time and stay till the end of the meeting
- Be attentive
- Be perceptive
- Help facilitate the discussion by taking an appropriate role in it.



Team Player Continued

- Be a contributor by:
 - Offer relevant discussion at the appropriate time.
 - Make your point in a clear and concise manner
 - Open to evaluation and constructive criticism
 - Be informative and proactive
- Don't be afraid to disagree
- Don't be afraid to be creative or innovative
- Give other board members the same respect you expect



Non-Productive Behavior

- Aggression . Bullying working for status by criticizing or blaming others, showing hostility, deflating the ego or status of others
- Blocking - Interfering with the progress of the group by intentionally deviating from the subject of discussion, citing personal experiences unrelated to the problem, rejecting ideas without consideration arguing excessively.
- Clowning-Joking mimicking, disrupting the work of the group



Non-Productive Behavior Continued

- Competing - Vying with others to produce the best ideas, to talk the most, to play the most roles, to gain the leaders favor.
- Degrading- acting in a manner that criticizes others
- Special pleading - Introducing or supporting suggestions related to personal concerns or philosophies, lobbying
- Self Confessing - Expressing inappropriate personal feelings or points of view.



Non-Productive Behavior Continued

- Sympathy Seeker- trying to gain group members sympathy for one's problems or misfortunes, deploring one's own ideas to gain support
- Withdrawn - acting indifferently or passively, resorting to excessive formality, daydreaming, doodling whispering to others, wandering from the subject
- Recognition seeking - Attempting to call attention to one's self by loud or excessive talking, extreme ideas or unusual behavior



Volunteerism

- All PTA Members are Volunteers.
- Not all members will choose to be actively involved.
- Welcome and be open to all members that chose to become actively involved.
- Celebrate your success!
- PTA mission & purpose = work for children
- Keep members = Have fun!



For Questions and concerns please contact:

- PTA Council of Howard County
- 410-740-5153
- General Email: office@ptachc.org
- Website: www.ptachc.org
- Facebook [PTA PTACHC Officers Group](#)
- MDPTA
- 410-760-6221
- office@mdpta.org





Thank you!

Have a great year!

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