



Team Guide for Presidents and Vice-Presidents

PTA Council of Howard County

5451 Beaverkill Road

Columbia, MD 21044

410-740-5153

E-mail: office@ptachc.org

Website: www.ptachc.org

Free State PTA: www.fspta.org

National PTA: www.pta.org

KNOW THE MISSION AND VALUES OF PTA

Every Child. One Voice.

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA Values

Collaboration: We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.

Commitment: We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.

Diversity: We acknowledge the potential of everyone without regard , including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

Respect: We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.

Accountability: All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

STRUCTURE OF PTA

Each level of PTA has been established for the purpose of forming a nationwide movement to advocate the need to support and speak out on behalf of children and youth in the schools, in the community, before governmental agencies, and other organizations that make decisions affecting all children.

LOCAL UNIT- YOUR SCHOOL'S PTA

The local PTA is the most important level of PTA. All other levels exist to serve the local PTA.

1. Operates as a self-governing body and is chartered by the state.
2. Plans programs and activities to meet community needs.
3. Works at the school site, at home, and in the community for all children.
4. Serves as the local organization through which the Free State and National PTA objectives are carried out.
5. Is represented on the PTA Council of Howard County or at Free State PTA functions by the unit president and/or designated representatives.

COUNCIL – PTA Council of Howard County : office@ptachc.org or board@ptachc.org

1. Includes all local units within the county.
2. Is the connecting link between locals and Free State PTA.
3. Serves as a conference body.
4. Provides workshops, leadership development, information, and programs.
5. Coordinates programs and projects for member units.
6. Works to promote PTA in the area.

STATE PTA - Free State PTA - www.fspta.org

1. Liaison between National PTA and local PTA.
2. Organizes units and councils.
3. Cooperates with other groups and organizations working for youth.
4. Maintains a legislative advocate.
5. Holds an annual convention.
6. Interprets and implements policies, programs and projects.
7. Provides workshops, field services, and leadership development.
8. Provides publications.
9. Represented on the National PTA Board of Directors by the current Free State PTA President.

NATIONAL PTA - www.pta.org E-mail: info@pta.org

1250 N. Pitt Street, Alexandria, VA 22314 phone: 800-307-4782

1. Members include all who join local PTAs.
2. Establishes basic policies.
3. Develops and funds projects that are national in scope.
4. Maintains legislative advocates at the federal level.
5. Provides field services and leadership development.
6. Develops and provides resource materials and publications.
7. Holds an annual convention.

YOU'VE BEEN ELECTED, NOW WHAT?

PTA's primary purpose is to support and advocate for children and youth

1. Make everyone feel welcome
2. **Never turn away a volunteer** - break the job down into pieces
3. Co-presidents – NOT ALLOWED, but you and your VP's can act as "co". They are there to help. Rely and call upon them. If your PTA has more than 1 VP, there must be defined duties in the bylaws.
4. Recite the PTA Mission before each meeting. This helps to keep a focus on children and youth during the meeting.
5. Understand your bylaws! Know the difference between the executive committee and the board of directors.
6. Are the bylaws up for their tri-annual review? If so, start the process immediately.
7. Purchase Robert's Rules of Order and become familiar with the parliamentary procedures
8. Keep your board of directors in the "loop" COMMUNICATE.
9. Try to attend all PTA Council general meetings. Meetings are usually the first Monday of the month and are noted on the HCPSS School Calendar. If you are unable to attend, set up a schedule so the vice president attends. Each local PTA has the right to three votes at each PTA Council meeting (president and two delegates).
10. You are responsible for all written material coming from the PTA. Exercise final approval before printing (e.g., newsletters and testimony).
11. Keep a phone log of incoming and outgoing PTA related phone calls.
12. Keep accurate files.
13. The principal does not determine how PTA funds are spent. PTA funds are spent according to budget.
14. If you are requested by the media to provide a statement, ascertain the request and say that you will call them back. Prior to returning the call, collect information if needed and prepare the statement.
15. Delegate, delegate, delegate. The PTA work is done through committee work. The committee chairs should be doing the majority of the work.

VICE PRESIDENTS – NOT JUST A TITLE WITHOUT A JOB

The role of the vice president is possibly the least understood office in PTA. The bylaws have a very cursory job description. Some PTA bylaws do have more specific duties for the vice president, especially if there is more than one VP. So read the bylaws first. Then take the opportunity to tailor the job to your talents. The Vice President should not be just in the President's shadow; work side by side and assist each other.

The Vice President basic duties are:

- ✓ Acts as aide to the president
- ✓ Performs any other specific duties listed in the bylaws/standing rules
- ✓ Presides at meetings in the absence of the president
- ✓ Be familiar with meeting protocols.
- ✓ Agenda setting and parliamentary procedure
- ✓ Familiarity with Roberts Rules
- ✓ Assumes the duties of the president in the event of the president's resignation until the position is filled in accordance with the bylaws
- ✓ Communicate and meet regularly with president

THERE ARE NO "CO-PRESIDENTS" IN PTA

Free State PTA, your bylaws, and Roberts Rules do not recognize "co" presidents or any other officer. However, the president and vice president can and should work as a team.

Why no "co"? The basic reason is that one person must ultimately be responsible for the decisions of the PTA organization. The same is true for treasurer.

THE PTA YEAR BEGINS JULY 1.

DURING THE SUMMER IS THE TIME TO MEET AND PLAN THE YEAR.

FIRST THING TO DO: Send in your new officers contact information to PTACHC and Free State PTA

SECOND THING TO DO: Read your bylaws

1. The Executive Committee consist of the elected officers – President, Vice President(s), Secretary(s), and Treasurer.
 - a) Determines fund raising commitments entered into by previous board of directors.
 - b) Reviews job descriptions.
 - c) Review standing committees and special committees. Add or delete committees as needed.
 - d) Select committee chairs - Standing committee chairs count towards quorum. Special committee chairs are not required, but are invited to attend, board of director meetings. Unfilled positions do not count towards quorum.
 - e) Meet with Membership Chair to plan for Membership drive (try to increase membership by at least 25 members).
2. The Board of Directors = the elected officers + 2 delegates + chairs of standing committees
 - a) Plan goals for the year.
 - b) Check for bylaws renewal date. If so, form a committee now.
 - c) Create PTA budget to be voted on at the first general membership meeting.
 - d) Plan meeting schedule – Check with feeder schools so to not conflict with their meetings, and with PTACHC, which meets the first Monday of the month.
 - e) Approve committee plans of work. Recording Secretary keeps approved plans in permanent file.
 - f) Select fund raisers: Fundraisers support the PTA budget which, in turn, supports goals.
 - g) Discuss and plan “First Day of School” information to be sent home.
 - h) Update the PTA website with current year information.
3. Communicate, communicate, communicate - Set up communication system:
 - a) Send in your officer contact information list to PTA Council and FS PTA by June 15th.
 - b) A mailbox system for board and committees. Share and keep everyone in the loop.
 - c) Set up the electronic e-mail list of board and/or the general membership members.
 - d) Update the PTA website.
4. Quick Reference Guide for president, financial, membership, advocacy, fundraising, programs, communication - Go to: www.ptakit.org
5. Questions – PTA Council is here for you. Please call us at 410-740-5153 or email office@ptachc.org with your questions. Also, visit our website at www.ptachc.org
6. Reflections - Plan to begin your Reflections Arts Program early in the school year. Email the name and contact information of your Reflections Chair to: reflections@ptachc.org so they may be informed of the program rules and submission dates.
7. PTA Grants/Awards - Assign another officer (the VP or secretary?) to be responsible for completing these forms.
8. Workshops - Attend training workshops offered by PTA Council of Howard County, FS PTA and National PTA. Notice of these workshops are on their respective websites.

GET ORGANIZED

All board members should each have a procedure/working notebook. If the PTA officers do not already have procedure books, initiate one. The book is passed on to the successor. A loose-leaf binder makes it easy to add or remove materials so the contents are up-to-date. The procedure book should contain the following:

1. Bylaws
2. Contact List: Name, address and phone number of the Board of Directors
3. Names, addresses and phone numbers of committee members
4. Approved plans of work:
 - a. Goals
 - b. Areas of interest
 - c. Possible projects and/or programs
5. Approved Budget (and any revisions to the budget throughout the year)
6. Reports of predecessors, which should include evaluations and recommendations
7. Reports of committee meetings and other meetings attended
8. Reports of programs or events provided by chairs/committees
 - a. Kind of meeting or event (speaker, film, panel discussion, etc.)
 - b. A person contacted and dates, etc.
 - c. Expenses for each event
 - d. Evaluation of each meeting and event
9. Copies of letters, fliers, articles written, publicity, press clippings
10. Year-end report, which includes the following:
 - a. Goals
 - b. Activities
 - c. Expenses
 - d. Evaluation of year's activities
 - e. Recommendations

BUDGETS: PROGRAMS AND FUNDING

During the summer, the budget committee prepares a budget for the upcoming year to meet the goals that the PTA board has established. This budget will be presented at the first General Membership meeting for membership approval. PTA Council suggests a “categorical budget”.

Evaluate:

Review the previous year's budget and what was actually spent. Which categories met, exceeded, or were under budget? Which programs exceeded their budget and why?

Developing the Budget:

The budget supports the PTA goals for the year.

What programs are planned for the upcoming school year?

What programs may need to be deleted or added?

Do your best to estimate expenses for programs/committees.

Include leadership conference/education for PTA leaders.

Ongoing administrative expenses; i.e. paper, copies, postage, website, etc.

The 3-to-1 Rule

When planning the year's activities, PTAs should use the 3-to-1 rule.

For every fund-raising activity, there should be at least three non-fund-raising projects aimed at helping parents or children or advocating for school improvements

Income:

Only those funds necessary to meet the needs of the year's activities and projects, as outlined in the PTA's budget, should be raised.

A PTA renders a greater service advocating for funding for such items that should be provided by the school system.

Plan for one or two well planned fundraisers to support programs.

What events were declining in revenue?

Are there any new ideas out there?

Consider a direct donation drive - PTA is a 501(c)3 organization; donations are tax deductible and some companies will match employee's donations.

PTACHC Scholarship Program

Each year, PTA Council of Howard County gives on average of 6-8 scholarships to students graduating from a Howard County high school. Information on these scholarship applications can be found at [PTACHC Scholarship Program](#). The four types of scholarships offered include Academic; Teacher Education; Trade, Technical Education or Community College, and Community Service.

PROPER USE OF PTA FUNDS

CONSIDERATIONS:

PTA funds should always be used for the direct benefit of the students attending the school (other than self-supporting PTA administrative expenses).

The local PTA unit has the responsibility to make an informed decision concerning the spending of local PTA money. Consideration should be given to the funds granted to the county education budget, the local administration process for obtaining educational equipment and supplies, the curricular guidelines, staff development, and the local school needs.

Before approving proposals for material aid to the school, the PTA should consider whether or not the proposed expense is one that should be supplied by public funds, e.g. the education budget. PTAs can consider providing for EMERGENCY needs not funded in the budget, but this should be viewed as a stopgap measure taken while working to arouse public support and funding for the particular item.

The following list of appropriate and inappropriate PTA expenditures was reviewed and approved by the Executive Committee of the National PTA and the National PTA's attorneys for use in Maryland.

EXAMPLES OF APPROPRIATE PTA EXPENDITURES: (in alphabetical order)

- Awards
- Communication / Publicity
- Classroom / School Enrichment Programs •
- Committee Expenses
- Cultural Arts
- Family Involvement Activities / Events
- Field Trips – The IRS requires that the PTA demonstrate how the field trip is directly related to curriculum. The PTA may be liable for injury or damages that occur during the field trip. Local PTAs should contact the insurance company to confirm coverage of the field trip
- Fund Raiser Expenses
- Guest Speakers
- Hospitality
- Insurance
- Leadership Training
- Legislative Activity
- Membership Supplies
- Memorials
- Needy Student Assistance
- Parent Workshops / Seminars
- Postage and Stationery
- Promotional Items
- PTA Administrative Costs
- PTA Dues
- PTA Newsletters
- PTA Office Equipment
- PTA Programs
- PTA Publications
- PTA / School Related Celebrations
- Reproduction Costs
- Scholarships
- Volunteer Appreciation

EXAMPLES OF EXPENDITURES TO AVOID: (in alphabetical order)

(The following items should be supplied by the local Board of Education)

- Capital Improvements
- Contributions to Other Associations
- Funding of School Personnel
- Janitorial Supplies
- Outside Equipment for Schools
- Principal's Discretionary Fund
- School Office Equipment
- School Presentation Equipment
- Teacher Development
- Technology - for school infrastructure

BYLAWS

BYLAWS: Currently being developed by Free State PTA - Within the next year all Maryland local units will need to approve new ones.

1. What is the date your bylaws were last approved?
2. If it has been three years or longer, they must be updated now.
3. Establish a bylaws committee to update.

Bylaws contain the basic rules of the organization. They supersede all other rules except the corporate charter, if there is one.

Bylaws are meant to work for you, to allow you to conduct business in an orderly, fair way. The provisions of the bylaws have a direct bearing on the rights of members. They are not meant to hamper an organization's ability to function or restrict an individual's rights.

Your PTA's bylaws must be updated every three years. Bylaws can be reviewed and amended whenever it appears there is a need. All executive board members should have a copy of the bylaws in their procedure book and be somewhat familiar with them.

All PTAs must use the most recent Free State PTA template (when made available). It is a fill in the blank template. You must not change the order of the article/sections, but may add additional sections as deemed necessary. On a separate piece of paper, put your PTA name and address at the top and the article and section that you will be adding for an addendum.

If you want a second pair of eyes to review your bylaws before you go to your membership for approval, please contact the PTA Council office at office@ptachc.org or call 410-740-5153. The Council office administrator and bylaws chair can take a look at your proposed changes before you submit them to your membership for a vote, and make suggestions if a potential problem is spotted. It's easier to rethink them before a vote than after the Free State PTA possibly rejects them.

Helpful hints can be found on the [PTACHC website Bylaws page](#).

INSURANCE

Know Your Insurance Coverage!

Association Insurance Management (AIM) is the official insurance carrier for all Howard County PTA/PTSAs. For updated contact information of who to call, please check [PTACHC's website - Insurance tab](#) or call AIM at 1-800-876-4044.

Policies are effective from July 1- June 30th of each year. The insurance premium is due before July 1st of each year.

All PTAs are required to be incorporated and all PTAs are required to have general liability and bonding insurance as well as directors and officers insurance. The insurance coverage is designed to cover allowable PTA events. It is critical that before planning any PTA activities the **STOP**, **PLAY**, and **PAUSE** pages of AIM's insurance guide be read.

A link to AIM's website and their guide is located on the PTACHC website under the tab Insurance.

STOP - activities are prohibited.

PAUSE - refers to activities where certain conditions must be met and the local PTA must consult with the insurance broker in advance of engaging in any of those activities.

PLAY - activities are approved.

Bonding Insurance- covers losses sustained by a PTA through any fraudulent or dishonest act committed by any of the elected officers and their successors or any non-compensated person who is authorized by an officer to handle PTA monies acting alone or in conspiracy with others.

Liability Insurance- covers for your legal liability arising from bodily injury, personal injury, advertising injury, and property damage to others arising out of your activities and operations.

Directors and Officers (D&O) liability insurance- provides protection for claims arising out of the wrongful acts (making policy and managing the affairs) of directors and officers that do not fall under the definition of physical injury. D&O liability insurance may provide coverage for the defense costs resulting from covered claims.

INCORPORATION

All PTAs in Maryland are incorporated entities. The PTA must maintain its good standing status by filing the Personal Property Return by April 15.

To check your PTA's current incorporation standing in the State of Maryland:

- Go online to www.dat.state.md.us
- click on Business Data Search
- click on Business Entity Charter/Personal Property in the top middle yellow box
- Type in your PTA's legal name in box.

WHEN IS IT DUE?

The PTA is an incorporated entity and must follow good fiduciary practices. As president, you should confer with the treasurer and membership chair to assure that all required financial taxes/forms are complete. The following is a list that the PTA must complete to be in good standing.

NOTE:

- All PTAs in Maryland are a federally tax-exempt 501(c)(3) under the IRS code
- Donations to the PTA are tax deductible - provide a receipt or a thank you letter for the donation
- All PTAs must carry general liability and bonding insurance as well as directors and officers insurance per state PTA insurance policy.
- All PTAs are incorporated in the state of Maryland

JULY – AUGUST

1. Review of the financial books should be completed during the summer. This is required by your insurance company.
2. Update bank signature cards with new officers and date of election (minutes and signature of outgoing officers needed for bank) and file with the bank.
3. The address on the bank account must be the school's address. Bank statements must be mailed to the school's address. The President (or appointed designee) must review and initial the monthly bank statement.
4. Membership cards are sent automatically to the PTA at the school's address in mid-August.
5. Budget - The treasurer serves on the budget committee to prepare the new budget in conjunction with written goals established by the executive committee for the fiscal year beginning July 1 – June 30.
6. Remember to file for your sales tax account if the PTA still has an account.

AUGUST/SEPTEMBER

1. Budget committee should be finalizing the budget to present to the board of directors.
2. Audit Review Report - presented to the board of directors.
3. Membership Drive begins.
4. Audit/Reconciliation Report - present to the general membership at first meeting.
5. Budget – present to the general membership for approval at first meeting.
6. Send a copy of the PTA audit report to both Free State PTA (treasurer.fspta@gmail.com) and PTACHC (socadocuments@ptachc.org).
7. IRS Form 990 - begin to prepare this form that is due Nov.15th. All PTAs must file one of the following forms: 990, 990EZ, 990T, or 990N.

OCTOBER

1. Free State and National Membership Dues (\$4.25 per member). Use the [Remittance Form](#) and send checks directly to National PTA, 1250 N Pitt St., Alexandria, VA 22314. Pay for only those memberships sold during the current month.
2. **File the 990EZ or 990N (www.irs.gov) ALL PTA's MUST FILE!!!!**

NOVEMBER

1. PTA Council dues are due to PTACHC Office by Nov. 1 (invoice found at www.ptachc.org)
2. PTACHC Scholarship Fund (if provided for in budget) - *donations accepted anytime.*
3. Scan or fax a copy of your 990 EZ or 990N to both Free State PTA (treasurer.fspta@gmail.com) and PTACHC (socadocuments@ptachc.org).
4. Send Membership dues received since October to National/Free State PTA.

DECEMBER

1. **MD Charitable registration renewal** (or exemption) with the state of Maryland Office of Secretary of State.
For the forms go to www.sos.state.md.us/Charity/Charityhome.htm
2. Make two copies of everything: Audit \ 990N/990EZ, \ Charitable Registration.
 - a) File the original with the government agency.
 - b) Keep one for your files.
 - c) Scan and send a copy to both FSPTA treasurer.fspta@gmail.com and PTACHC socadocuments@ptachc.org
3. Send Membership dues received since November to National/Free State PTA.
Don't get fined for being late. The gov't has a deadline; be early.

JANUARY

1. IRS Form 1099 (misc. Income) is due by January 31st. It is distributed to any person earning \$600 or more through PTA sponsored programs for the preceding calendar year.
2. Send Membership dues received since December to National/Free State PTA.

FEBRUARY

1. IRS Form 1096 is due by February 28th, (Annual Summary and Transmittal Form for those PTAs that must fill out IRS Form 1099's).
2. Send Membership dues received since January to National/Free State PTA.

MARCH

1. File PTA Personal Property Return (Annual Report) to the Maryland State Department of Assessments by April 15th. If you did not receive the form in the mail, go to:
<http://www.dat.state.md.us/sdatweb/personal.html>
2. Scan and send a copy of completed PPR form to both FSPTA treasurer.fspta@gmail.com and PTACHC socadocuments@ptachc.org.
3. Send Membership dues received since February to National/Free State PTA.
4. Ask for volunteers for a Nominating Committee.

April

1. Approve and vote in your Nominating Committee.
2. Send Membership dues received since March to National/Free State PTA

MAY

1. Committee Funds - collect budget projection forms from officers and committee chairs. These will be useful to help guide the budget committee in preparing the budget for the next fiscal year.
2. Audit committee shall be selected according to your bylaws. The fiscal year ends June 30th.
3. The Nominating Committee must send notice to the General Membership of the slate of candidates; consult your bylaws for requirements of notice.

JUNE

1. Have a General Membership meeting to elect new officers and vote to authorize the PTA to pay regular and necessary operating expenses over the summer.
2. Pay all outstanding bills by June 30th and close the books by June 30th.
3. Send account books to auditing committee of at least 3 non-signatory members or 1 person with financial background.

WAYS TO STRENGTHEN YOUR PTA

REMEMBERING THE MISSION

- Keep in mind the purpose of the PTA. Before embarking on any program or project, make sure it advances one or more of the objectives of the PTA and that it has the potential to improve the lives of all children and youth.
- Clearly define your PTA goals short-term and long-term. These goals should be definite results that you want to accomplish and you are willing to work for. Under each goal, make more detailed lists of objectives - specific steps that will help to accomplish the goal.
- Remember that you are part of a large group that advocates for all children and youth at all levels of PTA - local, council, state and national.

BUILDING THE PTA TEAM

- Respect the ideas/opinions of others. Always be courteous in order to keep the lines of communication open. Treat ideas and suggestions with interest, consideration and respect.
- Promote a spirit of teamwork. Give each member the opportunity to share experiences and ideas, as well as work on goals. A leader who expects and encourages members to assume responsibility makes people feel they are part of the group.
- Strive for consensus when making important decisions. Participation in decisions such as setting goals, assigning tasks, etc., heightens productivity.
- Build a warm, caring, open atmosphere to generate enthusiasm and a willingness to be involved.
- Acknowledge the contributions of your members. Praise and recognition fuel commitment and loyalty.
- Learn to relate to and work with different kinds of people. People will have diverse backgrounds, interests, concerns and ideas about what the PTA is and should be. Chairing a meeting or leading a group, requires more than knowledge of parliamentary procedures; it requires skills in working with other people.
- People are motivated to give their time and energy to the PTA when the PTA deals with issues that concern them - issues important to the needs of the children in the school and community. You can find what issues are important to your membership and to the community by circulating questionnaires, consulting with the school principal and other personnel, listening to people and asking for ideas.
- Delegate, delegate, delegate. Don't do it all yourself.

DELEGATING

- Presidents: rely on your Vice Presidents!
- Resist the temptation to take the easy way and do everything yourself; spreading the workload cuts down on volunteer "burnout" and keeps enthusiasm high. Ask the Vice Presidents for assistance.
- Delegating responsibility is a vital part of becoming a good leader, as is managing time wisely. You owe it to yourself, and to your PTA, to involve as many people as possible. Giving people

the responsibility for tasks of increasing importance will help them develop the ability to assume other leadership roles.

KEEPING ON TRACK

- Review your bylaws to ensure that you are following them and that they provide a reasonable framework to guide your actions. Bylaws should not be restrictive, and they should not be amended just to solve a problem.
- Make sure officers stay within the limits of their authority as defined by the bylaws. Basic decisions, such as establishing the budget, must be made at a general meeting of the PTA, not by the executive committee/board of directors.
- Manage the PTA's money responsibly. Keep expenses under control and within the budget as adopted and/or amended by the membership. Remember, those who pay dues have a right to participate in decisions as to how to spend the money, and a right to a strict accounting of the income and expense.
- Make your meetings more productive by carefully planning your agenda and exercising diplomatic control.
- Continuously evaluate what you are doing. Measure the efficiency of method, effectiveness of programs, morale within the group and progress toward goals.
- The time to begin preparing for a smooth transition to your successor is at the beginning of your term. By sharing responsibility, delegating authority, and including others in planning, you give others the chance to practice the skills necessary to lead the PTA. At the same time, you clearly signal that you recognize the need to move on when your term ends.

HANDLING STRESS

- Maintain your sense of humor. Working hard for important goals should not stop you from enjoying the work. Your PTA involvement should be fun.
- Dare to try something new, to do things differently. PTA leaders need imagination to develop new ideas and new ways of doing things. As you consider new ideas don't abandon what you have learned from experience. Remember to judge ideas on their own merits rather than on whether "we've always done it this way" or "we've never done it before." In response to your willingness to change, members are more likely to come forth with new ideas.

REMEMBER

- You won't please everyone. An essential element of leadership is the ability to accept criticism and deal with it honestly and constructively.
- Accept the fact that perfection is unattainable and a great waste of time. Perfectionism turns jobs that should be interesting, and even fun, into frustrating, hard work. Jobs need to be done well - not perfectly. Seek improvement and satisfaction - not perfection.

NEARING THE FINISH LINE!

Recognize and Nominate outstanding members for PTACHC/Free State PTA/Nat'l PTA Awards.

Year-end reports - each officer and committee chair should prepare a written report summarizing their activities for the year.

Procedure notebooks – update your working notebook as a permanent record of what you did; what worked and did not, and any other information your successor may need.

Clean out files - Keep all-important papers. Check [Records Retention Guide](#) found in the treasurer's guide.

DO NOT develop or present a budget in the spring for the general membership to approve. The newly elected executive board should form a budget committee and develop a budget to meet their needs and goals.

Present a motion that will authorize the PTA to pay regular and necessary operating expenses over the summer (e.g., phone lines, membership envelopes, summer conference reimbursement and registration, subscriptions, startup expenses) to include a specific dollar amount not to exceed; or a working percentage of the previous year's budget.

Don't feel pressured to spend every penny. National PTA recommends that emergency reserves be established in an amount equal to an average of three to six month's budgeted annual expenses. This fund is intended to serve as a means to retain financial stability in the event of an unforeseen and unplanned expense or an increase in inflation.

Approve an auditor or reconciliation committee to review the books at year-end.

Note the last day possible to hand in requests for reimbursement so the books can be closed out in a timely manner.

Write a year-end letter to the membership highlighting the advocacy activities, special events, and programs your PTA participated in the school year. You need to draw attention to the PTA - "toot your own horn so to speak". Don't be shy; you've done a great job!

Thank all the volunteers that have made the PTA and school successful. Create certificates and distribute them with a thank you note.

Host a 'volunteer tea' or assembly to honor the volunteers at all levels.

Tally the number of volunteer hours dedicated to promote the PTA in your school. Recognize those who have volunteered specific numbers of hours, e.g., 100 hours+, 250 hours+, 500 hours+, and maybe even 1,000 hours+. For some members, this is their full time job outside of their home. Recognition in front of peers is a wonderful way to say thank you.

Most importantly, evaluate your own status on the PTA. Do you have an interest to go forward in some leadership role and neglected to give your name to the nominating committee? It is never too late to volunteer! There is always a job to do, either at the local, council or state levels of PTA. Is there a future there for you?