PTA Presidents:

An Important Part of the TEAM!
Renee DeBiase
President, HCCPTA

Anna King
President, National PTA
Our Shared Mission:

To make every child’s potential a reality by engaging and empowering families and communities to advocate for all children.
Presidents & PTA

Understanding your role

The Advantages of Training

Utilize Your Networks

It’s Okay to Say “No”

Resources
“WHY?”

(Ice Breaker)
Understanding Your Role
# Executive Committee

### President
(required position)
- Presides at all meeting of the local unit, board of directors and executive committee
- Coordinate all work of officers and committees of the local unit
- Ex officio member of all committees except nominating
- Review and initial monthly bank statements
- Represent PTA at council meetings (or send alternate)

### Vice President
- Aide to the president
- Perform designated order of the duties of the president in the absence or inability of that officer to serve
- Perform such other duties as my be prescribed in the local unit PTA bylaws

### Secretary
(required position)
- Record minutes of all meetings, board of directors and executive committee
- Prepared to read minutes of previous meeting
- File all records
- Have a current copy of the bylaws
- Maintain current membership list
- Perform such other duties as prescribed in local unit bylaws

### Treasurer
(required position)
- Has full custody of funds of local unit
- Keep full and accurate account of receipts and expenditures; reconciles bank statement
- Provides written financial statement at every meeting of executive committee, BoD or general membership
- Responsible for maintenance of books
- Responsible for filing all necessary tax forms
- Responsibility of having accounts examined at close of fiscal year

---

Your bylaws are an invaluable resource in understanding your PTA!
Committee chairs can include: Reflections, Fundraising, Membership, Bylaws, etc. The principal of the school, or his/her representative, is also a member of the BoD.
The Advantages of Training
WHAT IF WE TRAIN THEM AND THEY LEAVE?
WHAT IF WE DON'T... AND THEY STAY?
The Fiduciary Responsibilities

1. Duty of Care
   Act in good faith using best judgement and what is in the best interest of the organization.

2. Duty of Loyalty
   Put the interests of the organization before personal and professional interests.

3. Duty of Obedience
   Comply with applicable federal, state, and local laws; adhere to organization’s bylaws.
# Standards of Affiliation

## Audit/Financial Review:
Local PTAs are required to conduct an audit of the financial records each fiscal year.

## IRS 990:
IRS 990 annually in November. The type of form your PTA needs to complete is based on dollar thresholds.

## Bylaws:
Bylaws must be updated at least every 3 years. Contact HCCPTA if you need a new bylaws template.

## Membership Dues:
PTA/PTSAs must remit dues to FSPTA. Dues ($/member):
- FSPTA/National PTA = $4.25
*Councils also charge dues

## Personal Property Return
Required annually. Because PTAs are non-profits, there are no filing fees. The personal property return is due April 15.

## Insurance
Bonding and liability insurance is required. It must be obtained through the FSPTA authorized provider (AIM Insurance)

## Maryland Charitable Registration
All PTAS are required to renew their charitable registration with MD State by December 31.

## Officer Contact Sheet
All PTAs are required to provide names and addresses of officers to FSPTA.
*Check with your Council to see if they are collecting for you.
Timeline: Where should we be?

<table>
<thead>
<tr>
<th>Due July 1</th>
<th>Complete by 1st membership meeting</th>
<th>Complete by 1st membership meeting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Insurance</td>
<td>Update Officer Contact Roster</td>
<td>Financial Review</td>
</tr>
</tbody>
</table>

- Pay Insurance
  - Send through your council or directly to FSPTA if no council exists
  - Should be updated as officers change throughout the year

- Update Officer Contact Roster
  - Financial review/audit will be approved by general membership
  - Should be conducted at the end of FY or as Treasurer changes
  - Submit to FSPTA

- Financial Review
  - Helps organize Board’s goals and the resources needed (people, money, buildings, etc.)
  - Used to support budget development

- Create plans of work for new fiscal year
  - Agreed to by the board; approved by the general membership
  - Adjustments can be made throughout the year
  - Submit to FSPTA
Utilize your Networks
It’s ok to say “NO”
PTA ≠ ATM
Current Leadership Development Resources

• PTA Kit & Bootcamp
• E-learning
• Training on New Membership Campaign
• Podcast
• Micro Learnings
• Webinars
• DEI Tools and Resources
• Cohort Training – Cultivating and Growing PTA Leaders: A Speakers Toolbox
Be kind to

Yourself!

You are doing important work!
Thank you for everything you do!
Renee DeBiase
President, Harford County Council of PTA
president@hccpta.org