



**FREE STATE PTA
CON LIVE
AUGUST 12-14, 2021**

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)

A close-up, shallow depth-of-field photograph of a child's hand holding a pencil over an open notebook. A yellow sticky note is attached to the page. The background is softly blurred, showing a lamp and a window with blinds.

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!

Board of Directors

Executive
Committee

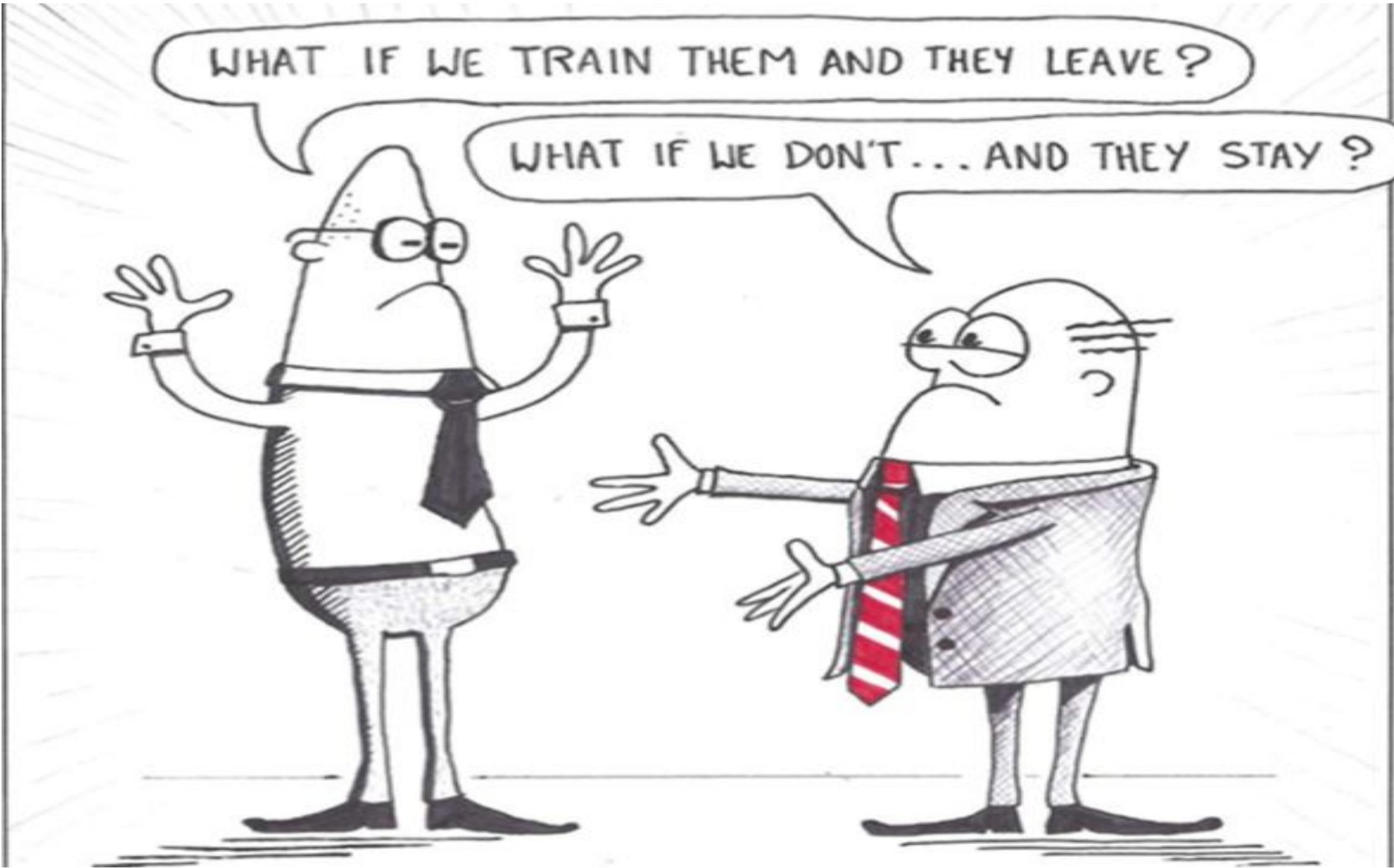


Committee
Chairs

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.

A close-up, shallow depth-of-field photograph of a hand holding a pencil over an open notebook. A yellow sticky note is placed on the page. The background is softly blurred, showing a window with light streaming in.

The Advantages of Training



This Photo is by Corporate Dilemma for eCubed

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 PTA's 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?

Due July 1

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

Complete by 1st membership meeting

Financial Review

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

Create plans of work for new fiscal year

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

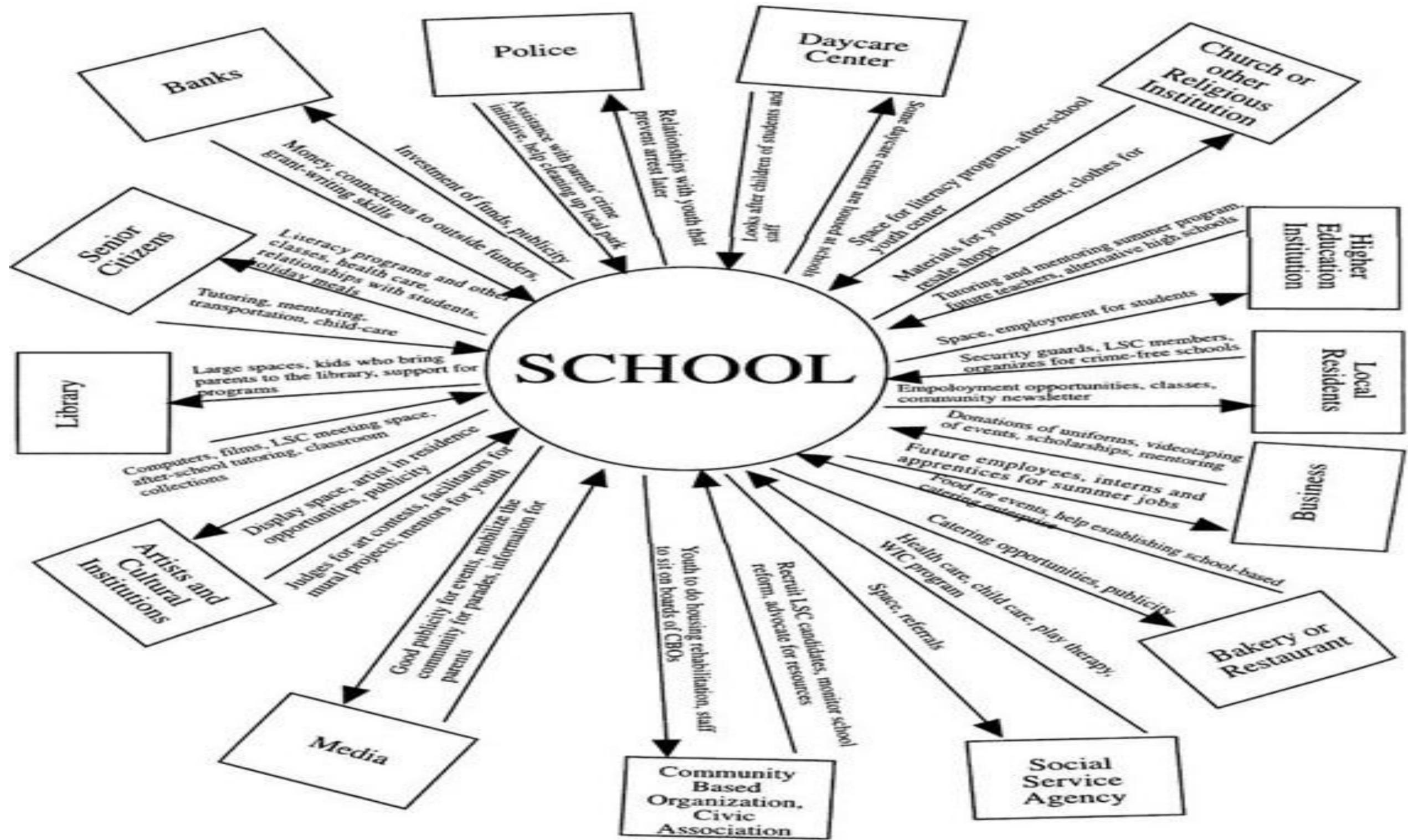
Complete by 1st membership meeting

Develop draft budget

- Agreed to by the board; approved by the general membership
- Adjustments can be made throughout the year
- Submit to FSPTA

A close-up, shallow depth-of-field photograph of a child's hand holding a pencil over an open notebook. The child is wearing a striped shirt. The background is softly blurred, showing a desk and a lamp. The overall tone is warm and focused on the act of learning.

Utilize your Networks



A close-up photograph of a child's hand holding a wooden stick, painting a yellow butterfly on a white card. The child is wearing a striped shirt. The background is blurred, showing a wooden surface and a white card with a yellow butterfly design.

It's ok to say "NO"

PTA ≠ ATM



Resources

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
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