



Working with a Board: A President's Tip Sheet

"The boss drives people; the leader coaches them. The boss depends on authority; the leader on good will. The boss inspires fear; the leader inspires enthusiasm. The boss says 'I'; the leader says 'we.' The boss fixes the blame for the breakdown; the leader fixes the breakdown. The boss says 'go'; the leader says 'let's go!'" - H. Gordon Selfridge

Congratulations! You are the chief leader among leaders who make up your board. Your job is to lead your team to achieve PTA's mission and fulfill your board's legal and ethical responsibilities. Your chief board role is to create the environment that leads to effective teamwork. Consider the following tips:

1. **Take it seriously.** Your PTA is part of the rich history and legacy of an association with more than 117 years of achievements. Ensure your board knows its legal and ethical responsibilities and understand how they fit into PTA's legacy.
2. **Embrace change.** Your board will contain change agents. Value what they bring to the table and do not view change as a threat but, instead, as inevitable.
3. Set a professional tone. Avoid petty issues, personality disputes, and rumor. If you stay mission-focused, your board will follow.
4. **Accept that bad things happen.** Words are uttered, people disappoint, and boards have ups and downs. No presidency is without a few bumps in the road. Don't start assuming the bumps are personal attacks or affronts. Don't let others push your buttons. Your board will mirror your behavior and your PTA will lose focus on what really matters. .
5. **Leave a legacy of leadership.** Look around you. Who has talent? Potential? What does your board need to know now and for the future? Leave your board stronger than when you arrived. Make your PTA's nominating committee work hard because many qualified candidates are ready to assume leadership roles. You will create a tighter, more effective team, one that will shine for years to come.
6. **Value individual's strengths.** Everyone has something to offer. Value the good each person brings to the board rather than concentrate on shortfalls. Identify and build on each board member's strengths.
7. **Define success.** Boards that agree on the same definition of success are focused and work well as teams. Help your board set goals together. Where does your PTA team want to go? How will you know when it's time to celebrate success together?
8. **Adjust and flex.** Recognize that everyone communicates and leads in a different manner and, to be an effective leader, you will need to adjust your style to meet the needs of your board's members. This will help create an effective team with minimal misunderstandings.
9. **Share the wealth.** What opportunities can you open to other board members? Cohesive teams share responsibility and opportunities, and grow and learn together.
10. **Keep it real.** Presidents are not royalty, surrounded by minions t their beck and call. They are servant leaders, helping membership achieve PTA mission and facilitating the board's work to serve children and families. Think of yourself as part of team, and build that team into a powerful resource for your community.



Basic Responsibilities of the Secretary

The secretary is responsible for keeping an accurate record of the proceedings of association meetings. These records are the permanent history of the PTA. Promptness and accuracy are key to this job.

The secretary also may be given the responsibility of maintaining all PTA correspondence, including incoming and outgoing communications with members and notifications for all meetings. It is common for a local unit to designate these responsibilities to a corresponding secretary.

Prior to a meeting, the secretary:

- Sends an announcement of the meeting (date and time)
- Works with the president to create an agenda
- Sends out the agenda and any pertinent documents necessary prior to the meeting, including the draft of the minutes of the previous meeting

At the meeting, the secretary:

- Takes attendance (by voice vote or sign-in sheet)
- Checks for quorum
- Presents the draft of the minutes of the previous meeting
- Takes minutes
- Counts votes

After the meeting, the secretary:

- Ensures the approved minutes are included in the permanent record of the association

The secretary should have these items on hand at all meetings:

- Minutes of the previous meeting and pertinent attached reports
- List of unfinished business to be discussed
- Agenda
- Current bylaws and standing rules
- Current membership list
- List of committee chairs
- Materials for note/minute taking



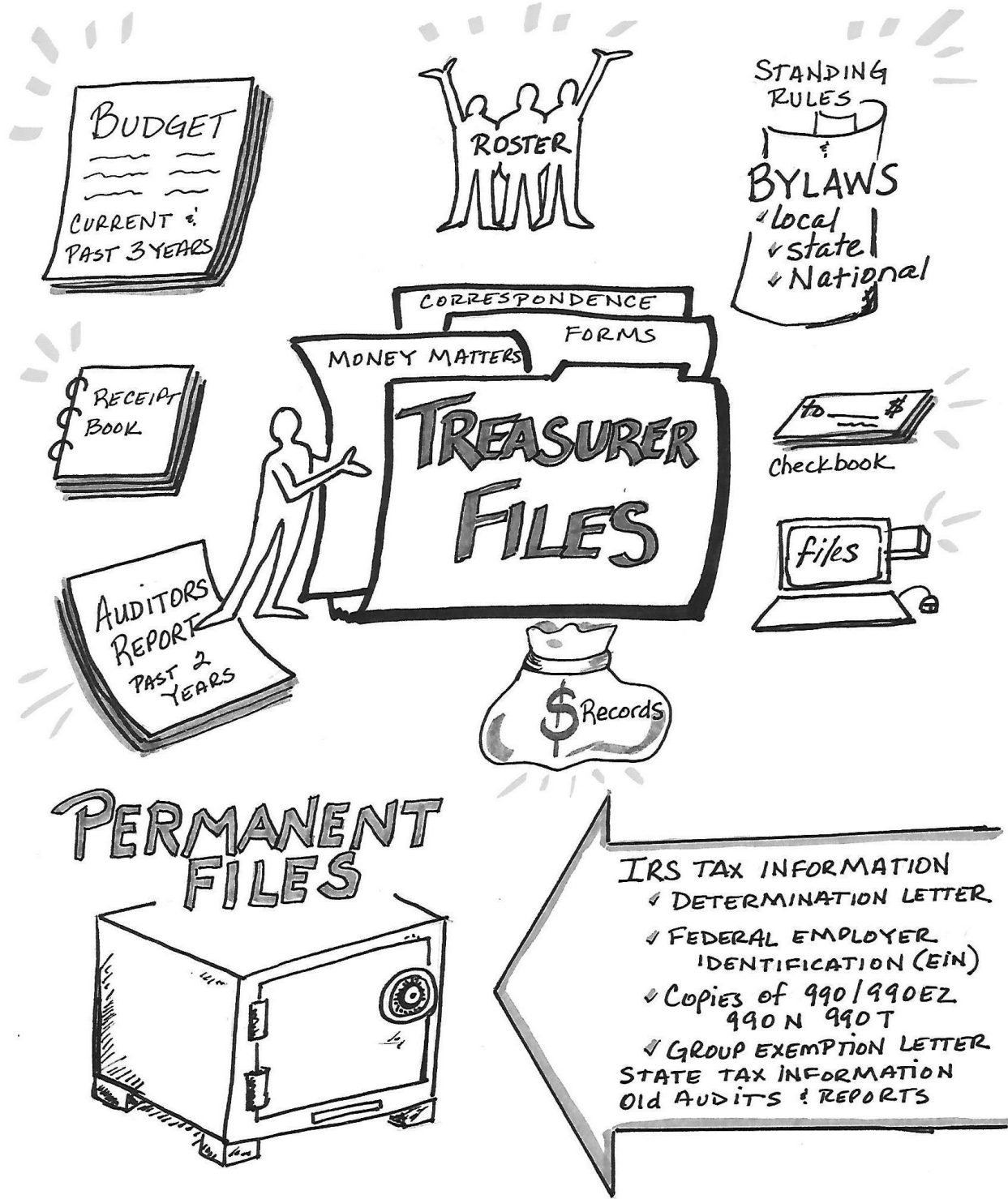
Basic Responsibilities of the Treasurer

The incoming treasurer should discuss with the former treasurer the status of current fundraising activities, what money is available to be spent versus what is owed, and the bylaws as they relate to the treasurer's responsibilities.

The treasurer is responsible for:

- Ensuring that the PTA's financial records are reviewed according to the bylaws before assuming his or her duties;
- Ensuring three authorized signatures are on file at the bank for financial transactions; these signatures are usually that of the current president and treasurer, and one other officer as an alternate (no two check signers should be from the same household);
- Obtaining two authorized signatures on every check;
- Collecting all money from persons delegated to collect or to raise funds during a local unit activity, and providing a written receipt for those funds;
- Promptly depositing all money in the name of the local unit in a bank account approved by the board;
- Maintaining an accurate record of all receipts and disbursements;
- Obtaining authorization from the board before writing a check or spending money;
- Remitting, by check, all authorized bills and statements as prescribed in the bylaws;
- Submitting a written financial statement at each board meeting and at each general membership meeting;
- Chairing the Budget Committee and preparing the annual budget as prescribed in bylaws;
- Reporting income and expenses as compared with the budget;
- Ensuring an audit, financial review or compilation is done in accordance with the bylaws, state PTA requirements, and the PTA's business practice;
- Preparing an annual report to be used to review PTA financial records; and
- If your unit is a 501(c)(3), ensure the filing of the PTA's 990 report to the IRS.

The [PTA Finance Quick Reference Guide](#) will help orient the treasurer to his or her main areas of responsibility.



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Basic Responsibilities of the Vice President

The vice president may be called upon at any time to temporarily assume the place of the president; therefore, he or she should study the president's duties and responsibilities and be familiar with the work of the PTA. In the event of the president's resignation, the vice president assumes all duties until the president's position is filled in accordance with the bylaws.

The vice president is responsible for:

- Performing specific duties as provided for in the bylaws;
- Assuming responsibility for duties designated by the president; and
- Representing the president in his or her absence or upon request.

Vice Presidents should have the following information:

- Unit bylaws and standing rules
- Unit approved budget
- Minutes of at least the last six previous meetings
- Contact information for all officers
- Contact information for state PTA leaders

A vice president is encouraged to be ready to assume leadership. Therefore, a vice president is encouraged to attend state PTA training and events, and to be familiar with all PTA programs and resources.