Virginia PTA
MAKE EVERY CHILD'S POTENTIAL A REALITY
everychild. onevoice.®

PTA PRESIDENT
ROOKIE TO ROCKSTAR

JUNE 2025

TODAY'S AGENDA

- Introductions
- Meet PTA
- Non Profit Governance Basics
- President's Role
- Building Your Team
- Principal Partnerships
- Get Started
- Resources & Upcoming webinars

WHO IS THE PTA?

PARENT TEACHER ASSOCIATION

The largest and oldest volunteer child advocacy association in the United States.

MISSION:

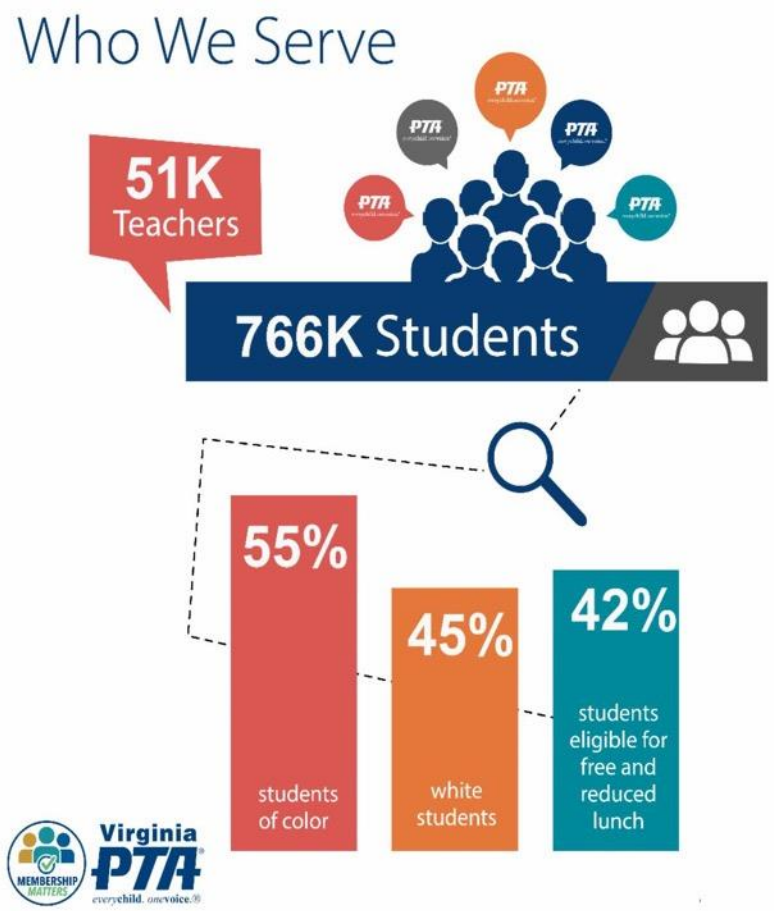
To make every child's potential a reality by ***engaging*** and ***empowering*** families and communities ***to advocate*** for all children.

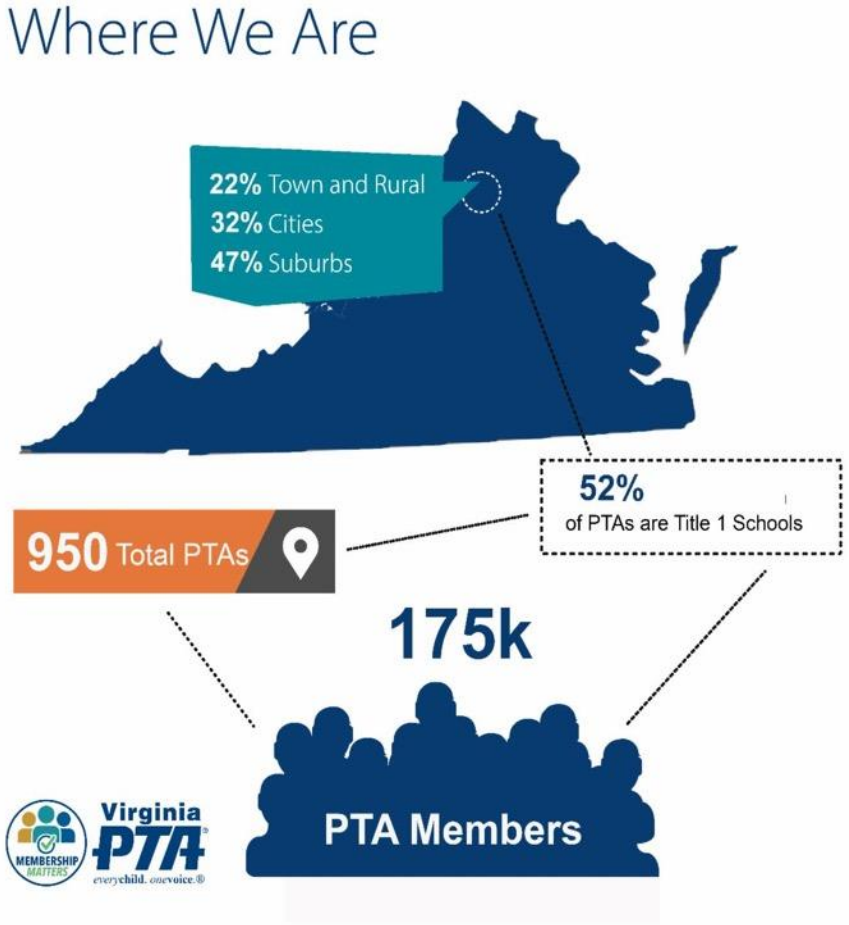
Virginia PTA
everychild. onevoice.®

WHY IS OUR VOICE IMPACTFUL?

OUR STORIES. EXPERIENCES. PERSPECTIVES.

As volunteers and elected leaders in our school communities, we observe first-hand the challenges that are faced by students and families.





RELEVANT RESOURCE

FOR FAMILIES & COMMUNITY

Virginia PTA
everychild. onevoice.®

PTA's Role: Family Engagement

Bridge between home and school

- Create a welcoming ***volunteer*** community to support students and school staff.
- Provide a ***forum for families*** to learn and ask questions about what is happening at school
- Host ***family events*** at school to create lasting student and family friendships that build the network of support that helps our students thrive.
- ***Information conduit & advocate***

WHY DID YOU VOLUNTEER??

Virginia PTA
everychild. onevoice.®

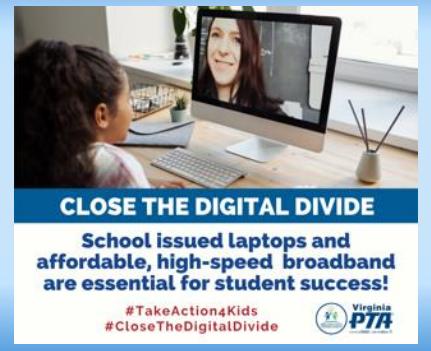
PTA's Role: Empower Families to Advocate

Focus on resources for students

High Quality Instruction

Health & Safety

School Infrastructure



Association = Volunteers Helping Volunteers

Virginia PTA's state officers are all parent volunteers!

Programs

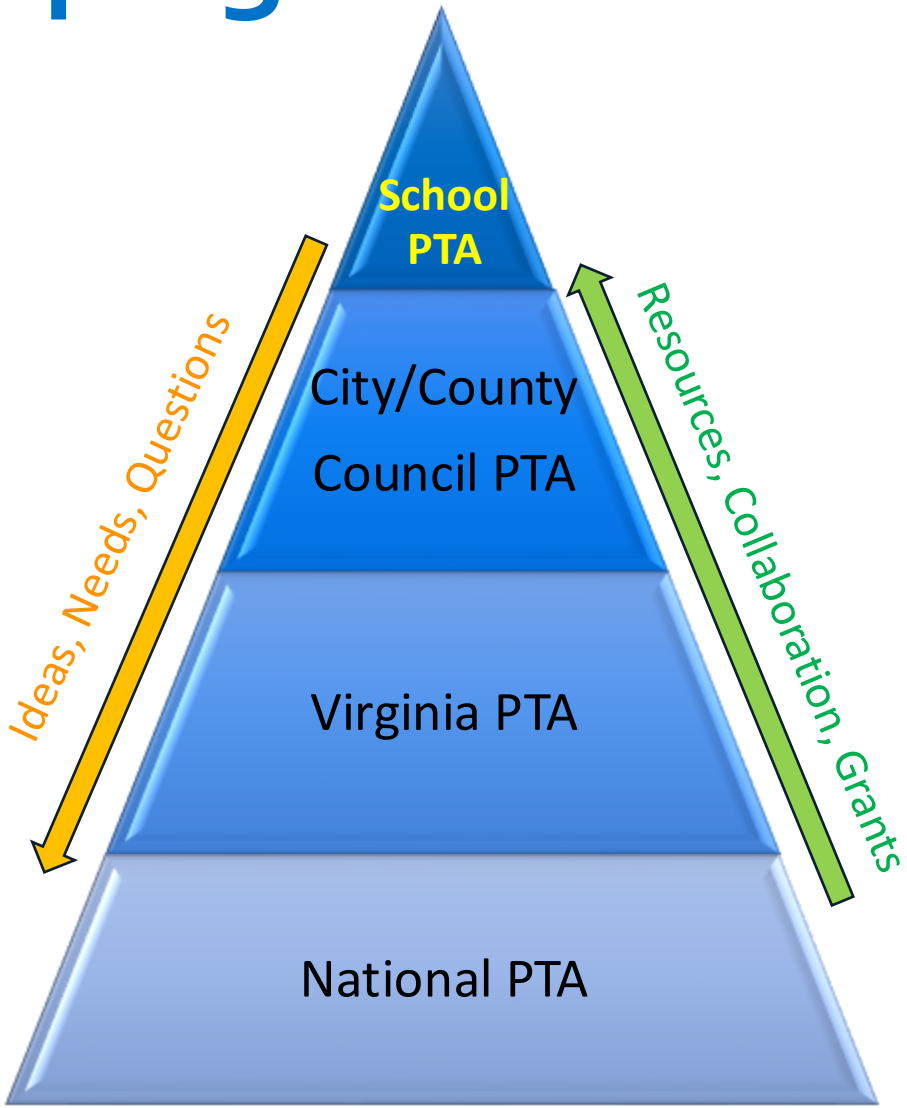
- *STEM Night, Family Reading, Digital Wellness*
- Leverage Parent Education materials
- Grants

Training

- Provide best practices for non-profit governance
- Save you time and energy!

Advocate

- Coordinate on county/ state-wide concerns
- Coordinated advocacy to support students



Your participation matters!

NON PROFIT BASICS

PTAs Are 501(c)(3) Nonprofit Organizations

PTAs are tax exempt organizations:

- PTAs do not pay income taxes on the monies they bring in
- Donors may be able to deduct donations on their income tax returns
- All officers have a fiduciary duty to the organization and help to maintain and protect the exempt status.

PTAs in Virginia:

- Are part of Virginia PTA's umbrella exemption with the IRS
- Have their own EIN
- Have an official name of "Virginia Congress of Parents and Teachers – Name of School PTA"
- Must meet all standards of affiliation set in the uniform bylaws in order to stay under the Virginia PTA umbrella

Virginia PTA
everychild. onevoice.®

Fiduciary Duty

As an elected officer (board member), you have a legal obligation to act in the best interests of your PTA

- **Duty of Care**
  - Board members do no harm. They protect PTA assets, including the PTA's name and reputation.
  - Board members follow the "Prudent Person Rule"– what would a prudent person do in this situation?
  - Board members advocate for and participate in their PTA's work.
  - Board members act in good faith using their best judgement and base decisions and actions on what is in the best interest of PTA.
  - Board members attend meetings, participate, educate themselves on issues, research, discuss, and stay informed.

- **Duty of Obedience**
  - Board members know and obey applicable state and federal laws.
  - Board members follow their PTA bylaws, standing rules, and policies.
  - Board members keep their PTA in good standing by abiding by Virginia PTA's Standards of Affiliation.
  - Board members are faithful to PTA's mission, using the mission as the foundation of decision-making.

- **Duty of Loyalty**
  - When making PTA decisions, board members place their PTA's interests over those of individuals, including family and friends.
  - Board members maintain confidentiality about sensitive PTA issues and information and allow a safe atmosphere for decision making.
  - Board members disclose all potential conflicts of interest and do not personally gain from board participation.

Conflict of Interest Policy, available at https://vapta.org/pta-basics/leaders-get-started/bylaws-policies

Bylaws = Policy

- Define the basic governance of your PTA in accordance with state and federal laws
- Uniform. The same for every PTA in Virginia

Local Unit Organizational Structure Form

1. *Dues*
2. *Officer Structure*
3. *Term Length*
4. *Meeting Notice & Frequency*
5. *Election Timeline*

READ THE BYLAWS!!

Organizational Structure Form

Adapting Uniform Bylaws

Date Approved by Membership: OCTOBER 12, 2021

TAX ID NUMBER XX-XXXXXX

PTA INFORMATION

Name of PTA Unit: Sample High School PTA		
Mailing Address: 1441 Big Campus Blvd City, VA 220XX		
PTA Type (Check One)	☐ PTA ☑ PTSA ☐ SEPTA ☐ Council	**Virginia PTA Region:** Sample
School District: Sample City Public Schools		**Virginia PTA Council:** Sample Council PTA

Annual Membership Dues charged to your Members (Includes both $1.50 to Virginia PTA and National PTA dues)
Individuals: $10 Students: $5 Teachers: $5 Other:

ELECTED OFFICERS

President, Treasurer, Secretary, --------

Number of Vice Presidents: 3

List Vice President Position Titles: (Add positions as applicable. Please do not list the names of individuals.)
1st VP of Family Engagement
2nd VP of Fundraising
3rd VP of Student Engagement
4th VP of
5th VP of
6th VP of
Additional Positions:

Officer Term Length (Check one):
☑ 1 year term with 2 consecutive terms
☐ 1 year term with 3 consecutive terms
☐ 1 year term with 4 consecutive terms
☐ 2 year term with 2 consecutive terms

EXECUTIVE COMMITTEE MEETINGS *(Elected Officers. Meets at the call of the President)*

Meetings per year: (Minimum) 5	Days Notice: (Standard Meeting) 5	Days Notice: (Emergency Meeting) 3

EXECUTIVE BOARD MEETINGS *(This includes Elected Officers, Principal, and Standing Committee Chairs)*

Meetings per year: (Minimum) 7	Days Notice: (Standard Meeting) 5	Days Notice: (Emergency Meeting) 3

GENERAL MEMBERSHIP MEETINGS *(Quorum is 10 members: Recommended 5-7 meetings per year)*

Meetings per year: (Minimum) 8	Days Notice: (Standard Meeting) 14	Days Notice: (Emergency Meeting) 3

NOMINATIONS & ELECTIONS
Nominations Committee should be elected 2 months before election. Must have odd number and no less than 3 people.

Month Membership Elects Officers: (Check one) X May ____ June	**Officer Transition:** (Check one) X Last day of the school year ____ Last day of the fiscal year (June 30)

** Officer Transition must be completed by July 1st. It is the fiduciary responsibility of outgoing officers to facilitate a transition that ensures events scheduled for the year are completed as planned and an orderly transition of documents and accounts occurs, until there is a transfer of fiduciary duty to incoming officers. Outgoing officers should complete the financial review and tax filing for the year they oversaw.*

Standards Of Affiliation

Legal Requirement to maintain your tax-exempt status & your affiliation with Virginia PTA.

THIS IS YOUR WORK FOR JULY!!

https://vapta.org/pta-basics/leaders-get-started/standards-affiliation

Finance Basics

Financial Health is Everyone's Responsibility

- 3 Officers on the Bank Account
- Checks signed by 2 people
- NEVER sign a blank check or a check to yourself
- Dues submitted MONTHLY (if more than 5 members)
- Bank statements are reviewed and verified against the Treasurer's Report every month by a non-signer
- Bank account and budget statements EVERY month!
- Cash is counted by two people
- Deposits should be made the same day
- Reimbursements should have a receipt and be attached to a reimbursement request form.
- Budget adopted at first meeting of the year, and general membership vote on changes that are more than $500

Legal Fiduciary Obligation

- Make sure your PTA has insurance.
- Annual Financial Review (3 Pages!)
- Annual IRS 990 filed by August 1st
- Sign all contracts once approved by membership.
- Remember, this is your member's money – and we are the stewards of that money!

Virginia PTA
everychild. onevoice.®

Types of Meetings

- *All require **notice**, a **quorum**, an **agenda**, and **minutes***
- *Plan your agenda keeping audience and role in mind.*
- *May not vote by proxy*

	Executive Committee	Executive Board	General Membership
Who can attend?	**Elected Officers**	Elected Officers + STANDING Committee Chairs + Principal, ex officio	School Community. You do not need to be a member to attend.
Who can vote?	Elected Officers	Executive Board Members	Those with paid memberships for the year May NOT vote by proxy
What is a quorum?	Majority of members in office	Majority of Executive Board Members EXCEPT Principal	10 Members OR 50% of members
How often?*	Call of the President OR majority of EC members	Call of the President OR majority of EC members	Standard 7 times (monthly) Min. 3 times (14 day notice)* Election Meeting: May/Jun
Role	-Set Goals -Appoint committee chairs/members	-Business btwn Gen. Memb. Mtgs -Create/Change Committees -Approve Plans of Work -Select Financial Review Comm. -Approve budget before Members	-Approve Org Structure Form -Approve Budget & $500+ changes -Engage school community

**Please refer to Organizational Structure Form*

PRESIDENT ROLE

"If your actions inspire others to dream more, learn more, do more and become more, you are a leader." – *President John Quincy Adams*

Responsibilities

Leader, Manager, Advocate, ***Team Member***

❖Lead & Manage

- Preside over meetings
- Set the Meeting Agenda
- Help Executive Board set and achieve goals
- Ensure financial and legal obligations are met
- Maintain communication with members

❖Represent your PTA

- Attend Council, State and National PTA Meetings
- Foster community relationships
- Create collaborative environment with the Principal
- Speak for your PTA – AFTER A VOTE!

❖Protect Assets & Reputation

- Promote PTA values & initiatives
- Use filter of “what’s best for the children”?
- You are a role model

Virginia PTA
everychild. onevoice.®

Your Leadership Style

- PLAN!!!
- Involve others
- Build consensus
- Establish atmosphere of cooperation
- Respect and appreciate each volunteer
- Delegate
- Remember – you are a role model

Virginia PTA
everychild. onevoice.®

Understanding Your Principal's Role

- Instructional leader
- School climate
- Safety
- Regulatory compliance
- Day-to-day operations
- Manage school personnel
- Family engagement
- Community relations

Principal Partnership Tips

Your Principal is an ex-officio member of your Executive Board

Full right to participate and vote in deliberations. Does not count towards quorum.

STEP 1: LISTEN & LEARN

- 30 min meeting; 4-6 weeks before school starts
- Ask about goals, programs or areas of focus

STEP 2: ALIGN TO PTA GOALS

- Develop 5 action ideas to support the school's focus/goals
- Send your PTA Executive Committee's ideas to the principal BEFORE the meeting

STEP 3: START PLANNING WITH YOUR BOARD

- Select 1-2 goals and start creating action steps

Do not engage in personnel issues
Do not engage the school administration in PTA personality issues
(Seek PTA Support)

Virginia PTA
everychild. onevoice.®

PTA Do's and Don'ts of Admin partnerships

RUN A SUCCESSFUL MEETING

Meeting Basics to Drive Engagement

- **WHEN & WHERE**
  - Plan for **monthly** General Membership Meetings
  - PTA meetings typically last **30-60** minutes. Try to start and end on time.
  - Establish a standard meeting time/place
  - Share the schedule at the start of the school year.
  - If virtual: All members must be able to simultaneously hear each other and participate during the meeting.

Quorum
Minimum attendance to vote on business

- **MEETING STRUCTURE & COMMUNICATION**
  - Set an **Agenda** & Distribute in Advance
  - Create a welcoming environment!
  - Take **Minutes at EVERY Meeting** (Executive Committee, Executive Board, General Membership)
  - Share a **Treasurer Report & Account Reconciliation at EVERY Meeting**
  - **First Meeting of the Year** = Adopt Your Budget
  - **Last Meeting of the Year** = Elections & Summer Budget
  - Include a Principal Update on academics / school operations
  - Summarize follow-ups at the end of your meeting and share the next meeting date
  - Ask your Principal to send your PTA Meeting invitation to the entire school community!
  - Consider holding a PTA meeting at the start of a family event to boost engagement

Set Your Agenda

I. Adopt Agenda

II. Approve minutes

III. Principal Update

IV. Monthly Financial Report

V. Old Business

VI. New Business

VII. Summarize Upcoming Actions

Sample Elementary PTA

AGENDA

GENERAL MEMBERSHIP

September 21, 202X
7:00PM – 8:00PM
School Library

ONLINE:
PHONE:

WELCOME!!!

I. Introductions
II. Adopt Agenda
III. Approve Minutes: _____ General Membership Meeting
IV. Principal Update
V. Monthly Financial Report (Treasurer)
   a. 202X-202X Financial Review Report (Treasurer)
   b. August Bank Reconciliation & Summer Budget Report
VI. Back to School: Post Event Review (Event Chair)
VII. Membership Report (VP Membership)
VIII. Family Engagement Planning Update (VP Family Engagement)
IX. Fundraising Planning Update (VP Fundraising)
   a. Spirit wear Status
   b. Spirit night schedule
X. Review and Approve 202X-202X Budget (Treasurer)
XI. Review Volunteer Opportunities
XII. Identify Advocacy Focus for 202X-202X
XIII. Discuss Event A: Sept 30th (Chair)
XIV. Discuss Reflections Arts Contest
   a. Entries Due: Oct 27th
   b. Rules & Entry Submission Here: https://formfaca.de/sm/oU8
XV. New Business

JOIN Sample School PTA!!

NEXT MEETING: October 18th @ 7:00pm
(3rd Wednesday of the month)

202X-202X BOARD MEMBERS

President
Name

Treasurer
Name

Secretary
Name

VP of Family Engagement
Name

VP of Fundraising
Name

VP of Membership
name

Spirit Wear Chair
Name

Food Bank Chair
Name

Outdoor Beautification Chair
Name

After School Activities Chair
Name

Advocacy Chair
Name

SEAC Chair
Name

Virginia PTA
everychild. onevoice.®

Your Role as Meeting Chair

- Introduce the **agenda**
- State the **objectives** of the meeting
- Introduce business per the agenda
- **Recognize speakers**
- Restate motion, call for the vote, and announce results
- Maintain order
- Manage time (list on your agenda)
- Review **action items/summarize t**o close

Virginia PTA
everychild. onevoice.

Managing Motions

Member 1	I move to increase the Reflections awards line by $200 for a total of $500.
Member 2	I second the motion
President	Restate Motion. Is there discussion?
Discussion	(Mange the time. No more than 20 minutes)
Member 3	I move to amend the motion to increase Reflections to $700 total.
President	**Is there a second…. Motion fails for lack of second.** The motion on the floor is…. to increase Reflections by $200 for a $500 budget. All those in favor of increasing reflections budget by $200, say 'aye'… All those opposed……All those abstaining. === Motion carries. The Reflections budget will be amended to be $500

Meeting Minutes

- Minutes should be taken at all Executive Committee, Executive Board and General Membership Meetings
- Include a list of attendees and the start and end time of the meeting
- Minutes don’t need to transcribe the discussion, but rather should document the decisions made and the rationale
- Record who made a motion, who seconded, and the result of the motion
- End your minutes with
  - Respectfully prepared by: [Secretary’s name]
  - Approved by [board, etc.] on [date]

Frequently Asked Questions

- **Do I need a motion to approve minutes?**
  - **Yes**, but the Chair can simplify the process: "Are there amendments?"
  - "Hearing none, the minutes are approved as presented."

- **Do I need a motion to adjourn?**
  - **No**, adjournment is a formal way to close a meeting
  - Chair should just say: "I adjourn the meeting at ____"
  - The time of adjournment is recorded in the meeting minutes
  - The only time you need the motion to adjourn a meeting is if the membership wishes to adjourn before the business is done

- **Should my Principal send out invites for our PTA meetings?**
  - **YES!** Your principal inviting the entire school community can increase engagement

LET'S GET TO WORK

Get Ready!

TRANSITION

- Meet with outgoing leaders!
- Review records, storage, procedures
- Update Officers in Givebacks == JUNE 15!
- Financial Review Committee is appointed
- Update bank signature cards
- Establish meeting preferences

BOARD FIRST STEPS

- **Set PTA Goals** – What does your PTA want to accomplish this year?
- What programs, events or projects has your PTA done in the past?
- Does your board have new ideas?
- Decide what committees you will need to make these events happen.
- Draft Your Budget – what money will you need to accomplish those goals?
- Set Calendar with Board and Principal

Virginia PTA
everychild. onevoice.®

Plan Your PTA Year

- July: Financial Review. Planning. Submit Compliance
- August: PTA Webinars. Back to School. Membership Drive
- September: Promote Reflections Arts Contest. Attend Council Meetings!
- September/October: Apply for National PTA Grants
- January: Attend Virginia PTA's Capitol Day in Richmond
- February: Follow your School Board's Budget Process
- March: Volunteer Award Nominations
- April: Attend Council Annual Meeting
- May/June: Attend Virginia's All-Unit Annual Meeting
- June: Attend National PTA's Convention

PTA PROBLEM SOLVING 101

1 - Consult With Leaders

Talk to your fellow board members and your principal for advice

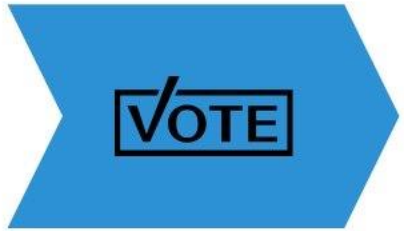
2 - Check the Bylaws

Take the emotion out of it. What do the rules say? Consult the bylaws, organizational structure form, standing rules

3 - Reach Out to Your Council

Councils are full of experienced leaders who have been in your shoes. They can also connect your to other local leaders that can help

4 -Let Your Membership Weigh-In



A membership vote can decide to change a leader, a policy position, or a standing rule impacting your PTA

5 - Contact VAPTA

When all else fails, contact VAPTA for support

5 Things to Do This Week

- Financial Review Scheduled?
- Review Your Budget
  - Capitol Day
  - Virginia's All-Unit Annual Meeting
  - National PTA Convention
- Where are the Records
- Schedule trip to the Bank
- Get Connected
  - Review the Virginia PTA Website
  - Sign-up for August Webinars
  - Plan to participate in Reflections Arts Contest

Virginia PTA
everychild. onevoice.®

THANK YOU!

VIRGINIA PTA

WWW.VAPTA.ORG