OUTGOING PRESIDENT / INCOMING PRESIDENT

\*\*\*SAMPLE ONLY – Please use as a guide to create your own\*\*\*

1. **What does the president do?**
   1. You are the face of the PTA Unit
      1. Your primary purpose is to coordinate the work of the officers and committees of the association in order that the Purposes may be promoted.
      2. Know your why
      3. Have some goals of what you would like to accomplish
      4. You also are tasked with keeping the local unit in compliance and functioning as a unit now and in the future
      5. Walking the line between directing people to get tasks done / being able to pick them up and pivot if needed / thinking of your board and what they are capable of
   2. Only one who can ask for a motion
   3. Only one who can sign contracts
   4. Manage our relationship with the school
      1. PTA is its own organization – you do not need principal’s permission
   5. Responsible for everything written and all statements to the media
      1. All public documents, letters, newsletters should go past you
      2. Media Response: always be prepared. FL PTA and Hillsborough County Council advise that you contact your local council for assistance. Depending on the severity, they can involve legal and help draft an appropriate response for the media or even respond on your behalf.
      3. You must follow any position statements from County, State, or National PTA
   6. Follow HCC PTA on Facebook, they also have a Past/Present Presidents page that is useful too
   7. From your first day – be thinking about your current board, who you will have next year and who is going to be your replacement
   8. Delegate / Delegate / Delegate
2. **Standing Rules / Kit of Materials / Minutes**
   1. Standing Rules – update every June/July
      1. Provides specifics for what each position does
   2. Kit of Materials
      1. Emailed to the president once in compliance – forward to the EC
      2. Read it
   3. Minutes
      1. These provide you with a record of the work the EC is doing
3. **How is the board organized?** 
   1. Executive Committee (EC)
   2. Executive Board = EC + Standing Chairs
   3. Chairs
      1. Standing vs. Event
   4. Vacancy of board member?
   5. Removal & Replacement of board member?
4. **Board meeting 101**
   1. You set the meeting time and run the meetings
   2. Allow everyone a chance to provide updates
   3. Planning is done in committees – board meetings are to make decisions
   4. Have the following:
      1. Agenda
      2. Treasurer Report
      3. POW
      4. Quorum (50% plus one – our quorum = 7)
5. **General Meeting 101**
   1. Quorum of 10
   2. Must give at least 3 days notice (we always give 2 weeks)
   3. Budgets, elections, nominating committee and bylaws must be voted at General Meetings
   4. Minutes taken & treasurer report
   5. Only members speak & vote
   6. Try to include a program to draw more people in
   7. Can be in person or virtual
6. **Events & POWs -** 
   1. President serves as “member ex-officio” on all committees EXCEPT nominating committee
   2. You review the POW ahead of time with the chair (or appoint a board member)
      1. Chair should be checking in with you on regular intervals
      2. Your job is to ensure they are PTA compliant
   3. The Chair or you will present the POW to the EC for approval
   4. May / June / July – begin selecting chairs
   5. Volunteers for events – new protocol
      1. VP of Volunteers will forward a copy of the Sign Up Genius to you and the front office.
      2. Pro-tip: Always have a spot for “floaters”
      3. Board members – let you know & you can email
7. **Programs**
   1. This is what PTA is all about
   2. Chairs should provide regular updates should be provided to the EC
8. **Fundraising**
   1. 3 to 1 rule
9. **Review – Email / Google Drive / Google Contacts**
10. **Memberhub**
    1. Executive Committee hub will be updated
    2. Admin for following have been set up:
       1. President
       2. Treasurer
       3. Any other board positions that you think is necessary
    3. NOTE: admin privileges are set up under personal emails
11. **Compliance items**
    1. Updated officers
       1. Completed on 5/20/2022
       2. Watch for Kit of Materials & share with board once it arrives
    2. Audit completed & sent to FL PTA by August 31
       1. President / Treasurer should get an email it has been received by FLPTA
       2. Treasurer needs to report it is done to the board and to membership at a GM
    3. 990 completed
       1. Due to IRS by November 15 \*\*\*DO NOT WAIT THIS LONG\*\*\*
       2. Due to FL PTA by November 30
          1. President / Treasurer should get an email it has been received by FLPTA
          2. Treasurer needs to report it is done to the board and to membership at a GM
    4. Treasurer should be paying dues every month and reporting it to the board
    5. By-Laws – renew every three years
       1. Provides your guidelines for how to run the organization
    6. Insurance – check when it renews and make sure Treasurer pays it on time and reports to the board once it has been paid
    7. Facilitron – make sure Treasurer uploads the new COI to renew the Blanket Use of Facilities
12. **Carryover items**
    1. Here you will review any open business – some units have events or other items that begin in the spring but are not executive until later in the year