



BOARDSMANSHIP

Serving on an executive board extends beyond the completion of your position-specific duties. As an executive board member, it's very important that you understand the responsibilities of the executive board as a whole and individually as outlined in the bylaws. It is everyone's responsibility to ensure the executive board is completing its required duties and implementing best practices. Being aware of not only your position specific duties, but also your executive board duties will set you up for success for the year!

TOP THINGS TO KNOW ABOUT PTA LEADERSHIP

1. **What to do FIRST:** Complete Key Trainings and the "Getting Started Items" on the back side of this page.
2. Become familiar with your PTA bylaws and standing rules (if applicable). Abide by these documents and the policies and procedures of Texas and National PTA.
3. Attend all executive board and membership meetings. Come to meetings prepared. Share any information you have about your position and listen to all information shared.
4. If your position is best served by having others involved, form a Committee. Recruit a team of volunteers who have a variety of ideas, talents, and skills.
5. If you have a committee, hold committee meetings as needed.
6. Be aware of how the Standards of Affiliation requirements can impact your PTA's eligibility to earn membership awards, participate in programs and opportunities provided by Texas and National PTA.
7. Update or start keeping a Procedure "Book," - traditional or electronic, - to provide your successor with everything you and your committee members do throughout the year.

KEY TRAININGS

- ☐ **BASICS Boardsmanship:** Required online course for all executive board members..
- ☐ **BASICS Boardsmanship Resource Guide:** Written resource guide to provide more in-depth answers to questions you may have about serving on an Executive Board.

IMPORTANT DATES AND DEADLINES

- **Within 30 days of Start of PTA year:** Become a PTA member
- **First Membership Meeting of the Year:** Financial Reconciliation Report for prior year is presented as well as amendments to the budget approved in the prior year.
- **EVERY MEETING:** A quorum must be present to vote. Minutes and a financial report must be presented.
- **Within 30 days of Election or Appointment :** Complete Essentials and BASICS training
- **By December 31st:** PTA must be in Good Standing in accordance with Standards of Affiliation
- **By January 20th:** If your PTA has a sales tax permit, a sales tax return must be filed by this date
- **At the Annual Meeting:** The president appoints a Financial Reconciliation Committee to meet after the fiscal year ends to complete the annual review.
- **Within 60 days of the PTA's Fiscal Year End:** IRS Form 990 must be filed electronically and accepted by the IRS

Questions? Find more resources at txpta.org/boardsmanship. Contact your Council PTA or Field Service Representative. If you need additional assistance, contact the Texas PTA State Office at 1-800-TALK-PTA.

Quick Start Guide

The BASICS materials provide essential training for many PTA positions. This guide is just the beginning!

ABOUT PTA

The mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

What this means: We engage, we empower, and we advocate in order to achieve our vision— every child's potential is a reality. Our mission statement guides us and should drive any significant decision. The funds we raise are used to support our mission.

WHAT IS PTA?

PTA is a 501c3, member-based association that advocates for the best interest of ALL children in many areas. It is self-governing and non-partisan. PTA advocates for or against issues but does not endorse any candidate or political party.

What this means: You are a member of a nonprofit board and therefore have certain legal responsibilities. Executive board members have three fundamental fiduciary duties: the duty of care, duty of loyalty, and duty of obedience. Board members act as trustees of the PTA's assets and must exercise due diligence to oversee that the PTA is well-managed and that its financial situation remains sound. The executive board verifies that all filing requirements and tax obligations are completed.

OUR PURPOSE

- Welcoming families into the school community
- Communicating effectively
- Supporting student success
- Speaking up for every child
- Sharing power
- Collaborating with communities

PTA STRUCTURE

Members
Local PTA (campus level)
Council PTA (district or independent)
Texas PTA
National PTA

FINANCE

The Life Cycle of A Budget

- Elected/appointed executive board members create plans of work which include a budget detailing project-related expenses.
- PTA happens and expenses occur.
- The executive board approves the plan of work and the membership votes to adopt the budget plan. They also review financial reports at each meeting of the membership.
- At the end of the year, financial reconciliation happens and the membership receives the report.

TRAINING

Scan the code or visit txpta.org/training to learn more.



GETTING STARTED

As a leader in PTA, there are a few things you need to do to start the year.

ONE	TWO	THREE	FOUR
First, join your local PTA! All board members must be PTA members.	Next, register with Texas PTA at txpta.org/submitting-board-member-information .	Your local PTA secretary will ask all board members to sign a Confidentiality, Ethics and Conflict of Interest Agreement.	Your local PTA president will ask all board members to create a Plan of Work which begins the annual budget process.