

# Incoming Officer Handbook

*A Reference for Getting Started*

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

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# Introduction

Congratulations on your election to PTA leadership! Whether you're stepping into your first officer role or bringing years of volunteer experience to a new position, you've joined a dedicated team working to make every child's potential a reality. Your willingness to serve demonstrates your commitment to children, families, and your school community.

PTA leadership is both rewarding and challenging. As a volunteer organization, we recognize that our officers bring diverse backgrounds, varying levels of experience, and different amounts of available time to their roles. This handbook is designed to support you regardless of your starting point, providing essential knowledge and practical tools you need to lead effectively.

Your leadership matters. Every decision you make, every meeting you facilitate, and every relationship you build contributes directly to PTA's mission and creates lasting positive impact in your community.

## Understanding PTA's Mission

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

This mission statement guides every aspect of PTA work. As an officer, your role is to ensure that your unit's activities, programs, and advocacy efforts directly support this mission. When making decisions about budget allocations, program priorities, or community partnerships, always ask: "How does this help us make every child's potential a reality?"

**Making every child's potential a reality** means recognizing that each child has unique strengths, interests, and needs. Your PTA works to ensure all children have access to the resources, opportunities, and support they need to succeed.

**Engaging and empowering families** involves creating meaningful opportunities for parents and caregivers to participate in their children's education, develop advocacy skills, and build connections with other families.

**Advocating for all children** extends beyond your own school's boundaries. PTA speaks up for policies and funding that benefit every child, including those who may not have strong voices advocating for them.

## Purpose of This Handbook

Whether you're completely new to PTA leadership or stepping into a different officer role, this handbook will guide you through everything you need to know to be successful. We've designed it to be practical and immediately useful, focusing on the real challenges and opportunities you'll face as a PTA officer.

You'll find essential leadership knowledge including practical startup guidance for your first 90 days, clear explanations of officer roles and responsibilities, strategic planning tools for setting goals and measuring success, communication strategies for building strong relationships, and compliance guidance for maintaining good standing.

## Working with Other Ohio PTA Resources

This handbook works alongside other Ohio PTA resources to give you comprehensive support. For detailed financial management information, consult the *Legal and Financial Handbook*. For specific compliance requirements, the *Ohio PTA Standards of Affiliation and Compliance Guide* has complete details. The *Advocacy Handbook* provides guidance on legislative engagement, while the *Committees Handbook* helps you organize effective volunteer teams.

## What You'll Accomplish

By using this handbook, you should feel confident leading your PTA team, maintaining all required compliance standards, building collaborative relationships with diverse stakeholders, making informed decisions that advance your mission, and preparing your successor for continued success.

This handbook is your roadmap to successful PTA leadership. Use it as a reference throughout your term, and don't hesitate to reach out to your Ohio PTA Region Advisor or the Ohio PTA office when you need additional support.

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# Getting Started: Your First 90 Days

Starting your role as a PTA officer can feel overwhelming, but breaking your initial work into manageable phases helps ensure you build a strong foundation for the year ahead. Remember that your responsibilities begin as soon as you are elected, not when your official term starts. This 90-day timeline provides specific actions and milestones to keep you on track while allowing flexibility to adapt to your unit's unique needs.

## Immediate Actions (First 30 Days)

Your first month focuses on gathering information, establishing key relationships, and understanding your current situation.

### Connect with Outgoing Officers

Schedule individual meetings with each outgoing officer, particularly your predecessor in your specific role. These conversations are invaluable for understanding your PTA's history, current projects, ongoing challenges, and opportunities for improvement.

#### Key questions to ask:

- What worked well during their term, and what would they do differently?
- Which community relationships and partnerships are most important to maintain?
- What ongoing projects or commitments need immediate attention?
- Which volunteers are most reliable, and what motivates them to stay involved?

- What challenges should you anticipate, and how can you prepare for them?

## **Essential transition items to request:**

- Complete procedure books and documentation from their role
- Contact lists for key volunteers, community partners, and school staff
- Calendar of annual events and important deadlines
- Recommendations for committee chairs and volunteer recruitment
- Insights about working effectively with school administration

## **Gather Essential Documents and Access**

Securing important documents and access credentials early prevents delays and ensures continuity of operations.

### **Immediate document needs:**

- Current PTA bylaws and standing rules
- Most recent financial review or audit reports
- Bank account information and current authorized signers
- Insurance policies and coverage documentation
- Meeting minutes from the past two years
- Membership roster and contact information

### **Digital access requirements:**

- Website management credentials
- Social media account access
- Email account passwords
- Givebacks platform login information
- Banking online access (if applicable)

If any essential documents are missing, work with outgoing officers and your Region Advisor to replace or recreate them. For guidance on creating officer procedure books, see Appendix G of this handbook.

## **Meet with School Administration**

Building a strong partnership with school administration is crucial for your PTA's success. This initial meeting sets the tone for collaboration throughout your term.

### **Meeting preparation and key discussion points:**

- Review your PTA's current programs and how they support school goals
- Discuss how PTA can best support the school's educational mission
- Establish communication protocols between PTA and school administration
- Understand facility use policies and procedures for PTA events
- Schedule regular check-ins throughout the year

This meeting should establish you as a collaborative partner focused on student success while maintaining clear boundaries between PTA and school operations.

## **Register in Givebacks and Review Bylaws**

Givebacks is Ohio PTA's management platform for officer information, dues payments, membership rosters, and communication. Complete your registration to ensure you receive important updates and maintain your unit's good standing.

Review your unit's bylaws thoroughly, focusing on officer roles and responsibilities for your specific position, meeting requirements and quorum definitions, committee structure and appointment procedures, budget approval processes and spending authority, and election and succession procedures.

## **Building Your Foundation (Days 31–60)**

Your second month focuses on team building, preliminary planning, and establishing the systems that will support your work throughout the year.

### **Form Your Officer Team**

Strong officer teams communicate regularly, share responsibilities effectively, and support each other's success.

#### **Team building strategies:**

- Schedule regular officer meetings (at least monthly, more frequently during busy periods)
- Establish preferred communication methods (email, text, group chats)
- Clarify each officer's role and decision-making authority
- Create systems for sharing information and coordinating activities
- Plan for coverage when officers are unavailable

#### **Early team discussions:**

- Overall vision and goals for your term
- Major events and activities to continue, modify, or discontinue
- Budget priorities and preliminary spending plans
- Committee structure and volunteer recruitment strategies
- Communication approach for membership and community

## **Recruit Committee Chairs and Key Volunteers**

Strong committees are essential for accomplishing your PTA's work while avoiding officer burnout. Early volunteer recruitment gives people time to plan their involvement.

## **Volunteer recruitment strategies:**

- Contact reliable volunteers from previous years
- Reach out to new families who expressed interest during spring events
- Consider parents of incoming students who want to get involved
- Ask current volunteers for recommendations
- Plan recognition and appreciation for all volunteers

## **Essential committee positions to fill early:**

- Membership chair (critical for fall recruitment)
- Budget/finance committee members
- Communications/publicity chair
- Major event coordinators
- Reflections program coordinator

For detailed guidance on organizing committees, consult the *Committees Handbook*.

## **Attend Ohio PTA Training**

The Ohio PTA Summer Leadership Conference provides essential training for new officers and valuable networking opportunities with other PTA leaders. Budget for conference attendance as a legitimate PTA expense that provides training on current best practices, networking opportunities with experienced leaders, updates on Ohio PTA policies and programs, and resources for your local unit.

## **Begin Strategic Planning**

Dedicate planning time to align your team on priorities and develop detailed plans for the year ahead.

### **Key planning outcomes:**

- Shared understanding of goals and priorities
- Preliminary calendar of events and activities
- Committee structure and volunteer recruitment plans
- Communication protocols and meeting schedules
- Action plans for major initiatives

Early budget planning allows time for thoughtful decision-making and ensures your financial plan supports your program goals. For detailed budget procedures, consult the *Legal and Financial Handbook*.

## **Preparing for Launch (Days 61–90)**

Your final month of preparation focuses on finalizing plans, establishing operational systems, and preparing for active programming.

## Finalize Budget and First Meeting Plans

Complete budget development with input from committee chairs and prepare for membership approval at your first general meeting. Your first membership meeting sets the tone for your entire year and handles essential business.

### First meeting priorities:

- Welcome new and returning members
- Present officer introductions and goals for the year
- Approve the annual budget
- Recruit volunteers for committees and activities
- Preview upcoming events and programs

For a sample meeting agenda, see Appendix A of this handbook.

## Establish Communication Systems

Effective communication keeps members informed, engaged, and connected to your PTA's work.

### Communication planning:

- Newsletter or email update schedule and format
- Website maintenance and update procedures
- Social media strategy and posting schedule
- Meeting notification procedures
- Emergency communication protocols

Consider your community's preferences and ensure multiple communication channels to reach all members effectively.

## Set Meeting Schedules

Consistent meeting schedules help members plan their participation and ensure regular communication among your leadership team.

### Meeting schedule considerations:

- Officer meetings (typically monthly)
- General membership meetings (frequency as specified in bylaws)
- Committee meetings (varies by committee needs)
- Special events and planning meetings

Coordinate with school calendars and community events to avoid conflicts.

# Essential Documents Checklist

## Governance Documents:

- Current PTA bylaws approved by Ohio PTA Bylaws Committee
- Unit standing rules and local policies
- Officer procedure books from predecessors
- Meeting minutes from the previous two years
- Access to current membership roster through Givebacks

## Financial Documents:

- Most recent financial review or audit report
- Bank account information and authorized signers list
- Current insurance policies (general liability, bonding, property)
- Previous year's budget and financial reports
- IRS Determination Letter and EIN documentation

## Communication Resources:

- Contact lists for school staff, community partners, and volunteers
- Website and social media account access information
- Previous newsletters and communication examples
- School district communication policies

## Program Documentation:

- Previous year's calendar of events and activities
- Vendor contact information and contracts
- Facility use agreements and permits
- Volunteer job descriptions and training materials

This 90-day timeline provides structure for your transition into leadership while maintaining flexibility for your unit's unique circumstances. Focus on building strong foundations during these first months, and you'll be well-prepared for a successful year of service.

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# Officer Roles and Team Building

Effective PTA leadership depends on officers who understand their roles, work collaboratively, and support each other's success. While your unit's bylaws define the specific duties for each position, this section provides guidance on how to fulfill those responsibilities effectively while building a strong officer team.

# President: Leadership and Vision

The president serves as the chief executive officer of your PTA, providing overall leadership and ensuring the organization stays focused on its mission.

## Key responsibilities:

- **Strategic Leadership:** Guide the development of annual goals and long-term planning that aligns with PTA's mission and addresses your school community's needs
- **Team Building:** Foster collaboration among officers, committee chairs, and volunteers by creating an environment where diverse perspectives are valued
- **Community Representation:** Serve as the primary spokesperson for your PTA in interactions with school administration, community organizations, and other stakeholders
- **Organizational Oversight:** Ensure the PTA operates according to its bylaws, meets all compliance requirements, and maintains high standards of integrity

## Meeting Management:

- Work with the secretary to develop focused agendas that allow time for discussion and decision-making
- Conduct meetings that encourage participation while maintaining efficiency using basic parliamentary procedure
- Ensure decisions made in meetings are implemented effectively by working with appropriate officers and committee chairs

## Partnership Development:

- Build collaborative relationships with school administration that support student success while respecting appropriate boundaries
- Facilitate communication between PTA members and school administration on issues of mutual concern
- Stay informed about school and district policies that affect PTA activities

For detailed financial oversight responsibilities, consult the *Legal and Financial Handbook*.

# Secretary: Communication and Records

The secretary serves as the organization's chief communication officer and record keeper, ensuring information flows effectively and organizational memory is preserved.

## Documentation Requirements:

- Document all official meetings with minutes that capture essential decisions, actions taken, and important discussions while maintaining objectivity
- Provide draft minutes to officers promptly after meetings, incorporate corrections, and maintain permanent files of approved minutes
- Understand that meeting minutes serve as legal records of your organization's activities and decisions

For sample meeting minutes, see Appendix B of this handbook.

## **Communication Management:**

- Handle official correspondence with other organizations, government agencies, and community partners while maintaining professional standards
- Coordinate communication among officers, committee chairs, and members to ensure everyone stays informed
- Work with the membership committee to maintain accurate membership records in the Givebacks platform

## **Filing Responsibilities:**

- Ensure required reports and documentation are submitted to Ohio PTA according to established deadlines
- Work with other officers to gather necessary information for state filings and maintain copies of all submitted materials
- Implement Ohio PTA policies regarding record keeping, communication, and organizational reporting

## **Treasurer: Financial Stewardship**

The treasurer serves as the primary financial officer, responsible for managing organizational funds with integrity, transparency, and accountability.

### **Overview of responsibilities:**

- Oversee all financial aspects of PTA operations including budget development, expense tracking, revenue management, and financial reporting
- Ensure your PTA meets all financial compliance requirements including tax filings, insurance coverage, and Ohio PTA Standards of Affiliation
- Implement and maintain financial controls that protect organizational assets while enabling efficient operations

The *Legal and Financial Handbook* provides comprehensive guidance on all aspects of treasurer responsibilities, including essential financial management principles, banking procedures, account management, money handling and deposit procedures, tax filing and compliance obligations, and insurance and bonding requirements.

### **Monthly reporting requirements:**

- Provide monthly financial reports to the board and membership that clearly communicate your PTA's financial position
- Track actual income and expenses against approved budgets and alert officers to significant variances
- Ensure all financial information is available for member review while protecting sensitive details

For a sample monthly financial report, see Appendix D of this handbook.

# Vice President and Other Officers

The vice president and other elected officers play crucial roles in supporting organizational success while developing leadership skills and preparing for future responsibilities.

## Supporting Leadership:

- Use your role to learn about all aspects of PTA operations while developing skills for increased leadership responsibilities
- Work closely with the president to ensure smooth operations and provide backup support when needed
- Understand that many vice presidents eventually serve as president, and use your current role to build necessary knowledge and relationships

## Specific duties as defined in unit bylaws:

- Review your unit's bylaws carefully to understand the specific duties assigned to your position
- Work with other officers to clarify any areas where bylaws may be unclear or where responsibilities overlap
- Understand any additional duties assigned based on organizational needs and individual strengths

## Committee coordination:

- Serve as a bridge between committees and the officer team, ensuring good communication and coordination
- Help committees access necessary resources while ensuring activities align with organizational goals
- Facilitate regular reporting from committees to the board and membership

# Building an Effective Officer Team

Success in PTA leadership comes from officers who work together effectively, support each other's growth, and maintain focus on the organization's mission.

## Establish Clear Communication

**Regular meetings:** Schedule regular officer meetings that provide opportunities for planning, problem-solving, and team building while respecting everyone's time and availability.

**Communication systems:** Understand how each officer prefers to receive and share information, and establish systems that work for everyone while ensuring important information doesn't get lost.

**Information sharing:** Create systems for sharing important information among officers and with the broader leadership team, ensuring everyone stays informed about developments and opportunities.

## Delegate Appropriately

**Skill assessment:** Understand each officer's strengths, interests, and available time, and assign responsibilities that make good use of individual capabilities while supporting professional growth.

**Authority clarification:** Ensure everyone understands their decision-making authority and when they should consult with other officers or seek broader input before taking action.

**Accountability systems:** Establish clear expectations for follow-through on commitments while providing support and resources needed for success.

## Support Each Other's Success

**Mentoring relationships:** Pair experienced officers with newer leaders to facilitate knowledge transfer and provide ongoing support throughout the year.

**Professional development:** Encourage and support attendance at training conferences, workshops, and other learning opportunities that build skills and expand perspectives.

**Recognition and appreciation:** Regularly acknowledge the contributions of fellow officers and celebrate successes both individually and as a team.

## Plan for Succession

**Knowledge documentation:** Maintain procedure books and documentation that will help successors understand their roles and continue important work effectively.

**Leadership pipeline:** Identify and encourage potential future officers by providing leadership opportunities and development experiences throughout the year.

**Transition planning:** Begin succession planning early in your term to ensure smooth transitions and continuity of organizational leadership.

For a sample procedure book and a leadership transition checklist, see Appendices G and H of this handbook.

## Committee Integration

Strong committees multiply your impact while distributing workload fairly and creating meaningful volunteer opportunities.

### Committee support strategies:

- Provide clear expectations and adequate resources for committee work
- Facilitate communication between committees and with school administration
- Ensure committee activities align with organizational goals and policies
- Recognize committee achievements and support volunteer development

## Volunteer recruitment and retention:

- Conduct skills surveys to understand community talents and interests
- Create meaningful opportunities that utilize existing abilities while providing growth opportunities
- Provide timely, specific recognition of contributions and their impact
- Offer flexible participation that accommodates different schedules and commitment levels

For comprehensive committee management guidance and templates, consult the *Committees Handbook*.

Remember that your role as an officer is both a privilege and a responsibility. Focus on collaboration, maintain your commitment to PTA's mission, and support each other's growth and success throughout your journey as PTA leaders.

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# PTA Structure and Compliance

As a PTA officer, you're part of a powerful network that extends far beyond your individual school. Understanding how this structure works and your unit's place within it will help you access resources, maintain compliance, and leverage collective advocacy power.

## PTA Organizational Structure

PTA operates through a connected structure that provides support, resources, and advocacy strength at every level:

**Individual Member** → **Local PTA Unit** → **PTA Council** → **PTA Region** → **Ohio PTA** → **National PTA**

**Local PTA Unit:** Your local unit makes its own decisions about programs, budgets, and priorities while following PTA purposes and policies. Units focus on specific school community needs while benefiting from larger organizational resources and advocacy power.

**PTA Council (If Applicable):** A collaborative organization of at least three local PTAs that work together under Ohio PTA's authority. Councils typically serve entire school districts, providing shared training opportunities, coordinated advocacy on district-wide issues, resource sharing, enhanced communication with district administration, and joint projects benefiting all schools.

**PTA Region:** Ohio PTA is divided into five geographic regions, each served by a Region Advisor who provides training conferences, direct support for unit challenges, networking opportunities, communication bridge to Ohio PTA, and assistance with compliance questions.

**Ohio PTA:** Serves as the umbrella organization providing statewide advocacy, legislative monitoring, training conferences, program resources, compliance oversight, and connection to National PTA resources.

**National PTA:** Provides the framework including legal structure granting 501(c)(3) status, national programs like Reflections, federal advocacy, research and position statements, training materials, and coordination with PTAs nationwide.

# Ohio PTA Standards of Affiliation

To maintain good standing and access PTA benefits, your unit must meet these standards annually. These requirements ensure that all PTAs operate with integrity, transparency, and accountability.

1. **Officer Contact Information** (Due July 15): Current officer information uploaded to Givebacks
2. **IRS Form 990 Filing** (Due November 15): Annual tax filing to maintain 501(c)(3) status
3. **Charitable Solicitation Registration** (Due November 15): Ohio Attorney General registration
4. **Membership Dues Payment** (Due November 30): Initial payment of national and state dues
5. **Financial Review Completion** (Due November 30): Annual financial review or audit
6. **Bonding Insurance Coverage** (Current by November 30): Financial protection insurance
7. **Code of Ethics Policy** (Adopted by November 30): Behavioral guidelines for members
8. **Conflict of Interest Policy** (Adopted by November 30): Guidelines for managing conflicts between personal and PTA interests
9. **Volunteer Hours Report** (Due June 15): Annual report of all volunteer hours by unit members

## Annual Compliance Timeline

**July 15:** Officer information uploaded to Givebacks

**November 15:** IRS Form 990 and Ohio Attorney General filings

**November 30:** Dues payment, financial review, insurance verification, and policy adoptions

**June 15:** Volunteer hours report submitted to Ohio PTA

For detailed procedures and step-by-step guidance, consult the *Ohio PTA Standards of Affiliation and Compliance Guide*. A helpful compliance checklist is provided in Appendix F of this handbook.

## Consequences of Non-Compliance

Units that fail to meet Standards of Affiliation may lose good standing, affecting their ability to participate in state and national programs, receive awards and recognition, access resources and support services, and maintain nonprofit status and insurance coverage.

## Essential Compliance Requirements

### Financial Review

A Financial Review Committee appointed by the president must consist of at least three members without check signing privileges. The committee reviews the treasurer's accounts and signs a financial review report. Complete instructions are found in the *Legal and Financial Handbook*. Detailed procedures and templates are provided in Appendix E of this handbook.

### Required Policies

**Code of Ethics Policy:** Guidelines for how PTA members should conduct themselves in difficult situations. Members review and vote to adopt the policy, which becomes binding for all unit members.

**Conflict of Interest Policy:** Guidelines for handling situations where personal interests may conflict with PTA interests. Members review and vote to adopt the policy, which becomes binding for all unit members.

Both policies must be signed by the unit president and added to permanent files.

## Insurance Requirements

**Bonding Insurance:** All units must carry financial fraud insurance (fidelity bonding). Coverage amount should cover the average gross receipts during the year. The certificate protects the organization against theft or embezzlement of funds.

## Bylaws Review

Bylaws must be reviewed and updated at least every three years, though more frequent review is recommended. The bylaws do not necessarily need amendments, but they must be reviewed by a committee and affirmed by member vote.

## Financial Management Essentials

As an officer, you share responsibility for ensuring your PTA's financial resources are managed with integrity, transparency, and accountability.

## Fiduciary Responsibilities

**Duty of Care:** Active participation in financial oversight through regular review of treasurer's reports, understanding budget performance, asking questions about unusual expenses, and ensuring proper financial controls are followed.

**Duty of Loyalty:** Putting PTA's interests before personal interests by avoiding conflicts of interest in financial decisions, maintaining confidentiality of sensitive financial information, and supporting decisions that benefit the organization.

**Duty of Obedience:** Ensuring compliance with legal requirements including proper tax filings, following PTA policies and procedures, operating within bylaw authority, and maintaining tax-exempt status requirements.

## Essential Financial Controls

**Authorization procedures:** Proper approval for all expenditures according to bylaws and standing rules. Understanding spending authority and when board or membership approval is required protects against unauthorized spending.

**Dual control systems:** Two people count money, two signatures on checks, separate responsibilities for receiving and depositing funds, and regular reconciliation by someone other than the treasurer.

**Documentation requirements:** Maintaining receipts for all expenditures, recording detailed meeting minutes for financial decisions, preserving bank statements according to retention schedules, and ensuring transparency through regular financial reporting.

## Legal and Ethical Responsibilities

### Understanding Your Legal Status

**501(c)(3) tax-exempt status:** Your PTA operates under Ohio PTA's group exemption, providing tax benefits while requiring adherence to specific operational requirements.

**Non-partisan requirements:** PTA can advocate for policies and issues but cannot endorse or oppose candidates for public office, participate in partisan political campaigns, or allow partisan activities under PTA auspices.

**Non-sectarian and non-commercial policies:** PTA maintains its educational focus without promoting religious views or commercial interests that could compromise its mission or tax-exempt status.

### Record Keeping Requirements

**Permanent retention:** Bylaws and amendments, IRS determination letters, meeting minutes and major policy decisions, and annual financial statements.

**Seven-year retention:** Detailed financial records including bank statements, invoices and receipts, payroll records (if applicable), and supporting documentation for tax filings.

**Three-year retention:** Routine correspondence, committee reports, membership rosters, and event planning materials.

**Storage considerations:** Secure storage for current records with limited access, backup systems for digital records, organized filing systems for easy retrieval, and secure disposal procedures at end of retention periods.

## Your Support Structure

You're not alone in your officer responsibilities. A comprehensive support network exists to help you succeed.

**Council Support (If Applicable):** Shared expertise from other units, joint training opportunities, coordinated advocacy on district-wide issues, resource sharing for programs and materials, and mentorship programs.

**Your Region Advisor:** Personalized assistance based on local community knowledge, compliance guidance for Standards of Affiliation, training coordination, problem-solving support, and communication bridge to Ohio PTA leadership.

**Ohio PTA Office:** Compliance assistance including Givebacks support, resource distribution, program coordination, and technical support.

Remember that this network exists to support your success. The strength of PTA lies in the connections between dedicated volunteers who work together to make every child's potential a reality.

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## Meetings and Governance

Effective meetings are the foundation of successful PTA leadership. Well-run meetings engage members, facilitate good decision-making, and move your organization forward while respecting everyone's time and contributions. Understanding different types of meetings, basic parliamentary procedure, and proven planning strategies helps you create productive experiences that advance your mission.

### Types of PTA Meetings

Different types of meetings serve different purposes in your PTA's governance structure.

#### Officer/Board Meetings

Most PTAs use either an executive committee structure (officers only) or a board structure (officers plus committee chairs), but typically not both. These smaller meetings provide coordination, routine decisions, and preparation for membership meetings.

##### Primary purposes:

- **Operational Planning:** Coordinate activities, resolve scheduling conflicts, and address immediate challenges
- **Agenda Development:** Plan upcoming membership meeting agendas and ensure necessary materials are prepared
- **Policy Implementation:** Discuss how to implement membership decisions effectively
- **Budget Oversight:** Monitor spending, review financial reports, and make routine financial decisions within established authority

**Typical frequency:** Monthly or as needed, with additional meetings during busy periods.

#### General Membership Meetings

General membership meetings are where your PTA's democratic governance takes place. These meetings provide opportunities for all members to participate in decision-making.

##### Legal and bylaw requirements:

- **Budget Approval:** Annual budget must be approved by membership vote, typically at the first meeting of the school year

- **Bylaw Amendments:** Changes to bylaws require membership approval with proper advance notice
- **Officer Elections:** Annual elections must be conducted according to bylaw procedures
- **Major Policy Decisions:** Significant changes to programs or organizational direction typically require membership input

## Meeting planning considerations:

- **Accessibility:** Schedule meetings at times and locations that accommodate diverse family schedules, considering childcare, transportation, and work commitments
- **Engagement:** Balance necessary business with programming that interests and informs members
- **Communication:** Provide adequate advance notice of meetings and agenda items, especially for items requiring votes
- **Participation:** Create welcoming environments that encourage member participation while maintaining focus

## Parliamentary Procedure Fundamentals

Parliamentary procedure provides a framework for conducting organized, fair meetings where all members can participate effectively. Understanding basic principles helps you facilitate productive discussions and make decisions that reflect the will of your membership.

## Basic Principles of Robert's Rules of Order

### Fundamental principles:

- **One Thing at a Time:** Consider only one main motion at a time to ensure focused discussion and clear decision-making
- **Majority Rules:** Most decisions require a simple majority vote of members present, though some actions may require higher thresholds
- **Minority Rights:** Parliamentary procedure protects minority viewpoints through opportunities for discussion and fair consideration
- **Equal Treatment:** All members have equal rights to participate in discussion and decision-making

## The Eight Steps to Making a Motion

1. **Obtain the Floor:** Member rises and addresses the chair saying "Madam President" or "Mr. President"
2. **Recognition:** Chair recognizes the member by name or nod
3. **Make the Motion:** Member states "I move that..." followed by a clear, specific proposal
4. **Second the Motion:** Another member says "I second the motion"
5. **Chair States the Motion:** President restates the motion clearly
6. **Discussion:** Chair facilitates member comments and debate about the motion
7. **Vote:** Chair calls for the vote: "All in favor say 'aye'" and "All opposed say 'nay'"
8. **Announce Results:** Chair announces whether the motion passed or failed

# Managing Discussion Effectively

## Strategies for productive discussion:

- **Balanced Participation:** Recognize speakers fairly, ensuring multiple viewpoints are heard while preventing domination by individuals
- **Time Management:** Keep discussion focused on the motion being considered and redirect conversation that wanders to unrelated topics
- **Clarification Support:** Help members understand complex issues by asking for clarification and summarizing key arguments
- **Respectful Environment:** Maintain civility by requiring members to address remarks through the chair and focusing on issues rather than personalities

# Meeting Planning and Management

Successful meetings result from thoughtful planning that considers your objectives, participants' needs, and the logistics necessary for productive outcomes.

## Agenda Development and Distribution

A well-crafted agenda serves as your roadmap for productive meetings and helps participants prepare for meaningful contribution.

### Elements of effective agenda development:

- **Clear Objectives:** Identify specific outcomes you want to achieve and organize agenda items to support those goals
- **Logical Sequence:** Arrange items in order that facilitates good decision-making, typically placing reports before related action items
- **Time Allocation:** Estimate time needed for each agenda item and plan realistic agendas that respect participants' schedules
- **Supporting Materials:** Ensure all necessary reports, documents, and background information are available before the meeting

### Agenda distribution best practices:

- **Advance Notice:** Distribute agendas at least one week before meetings to allow preparation time
- **Clear Format:** Use consistent, easy-to-read formats that clearly identify action items, reports, and discussion topics
- **Contact Information:** Include contact information for questions about agenda items
- **Accessibility:** Provide agendas in formats accessible to all participants

# Ensuring Quorum Requirements

Quorum requirements protect your organization by ensuring important decisions have input from an adequate number of members.

## Understanding quorum:

- **Bylaw Definition:** Review your unit's bylaws to understand exactly how quorum is defined (number of members, percentage of membership, or other criteria)
- **Different Requirements:** Some meetings may have different quorum requirements that require different planning approaches
- **Attendance Tracking:** Develop systems for accurately tracking attendance to determine when quorum is met
- **Contingency Planning:** Prepare strategies for situations when quorum is not met

## Strategies for achieving quorum:

- **Member Engagement:** Build strong relationships and relevant programming that encourages regular meeting attendance
- **Communication Excellence:** Provide clear, advance communication about meeting importance and agenda items
- **Scheduling Consideration:** Survey members about preferred meeting times and consider rotating schedules
- **Follow-Up Systems:** Contact members who typically attend when important items require their input

## Creating Welcoming Environments

Meeting environments significantly impact participation and decision-making quality.

### Physical environment considerations:

- **Accessibility:** Choose locations that are physically accessible to all members and provide necessary accommodations
- **Comfort Factors:** Ensure adequate lighting, comfortable seating, and appropriate room temperature
- **Technology Support:** Provide microphones, projection equipment, or other technology needed for effective communication
- **Childcare Options:** Consider providing childcare or family-friendly meeting formats

### Social environment strategies:

- **Welcome Procedures:** Develop consistent ways to welcome new members and visitors, including introductions and orientation to meeting procedures
- **Cultural Sensitivity:** Plan meetings that respect diverse cultural backgrounds and communication styles
- **Language Access:** Provide translation services or multilingual materials when needed
- **Participation Encouragement:** Create opportunities for different types of participation beyond formal speaking

## Time Management and Efficiency

Respecting participants' time builds trust and encourages continued engagement.

## Time management strategies:

- **Start and End Promptly:** Begin and conclude meetings at scheduled times to demonstrate respect for participants' commitments
- **Agenda Adherence:** Stay focused on planned agenda items while remaining flexible for urgent issues
- **Decision Readiness:** Come prepared with necessary information and recommendations to facilitate efficient decision-making
- **Action Orientation:** Focus discussion on actionable items and defer purely informational items to written reports

## Meeting efficiency techniques:

- **Preparation Investment:** Invest time in pre-meeting preparation to ensure smooth meeting flow
- **Role Clarity:** Ensure all participants understand their roles and responsibilities during meetings
- **Technology Integration:** Use appropriate technology to streamline processes like voting and information sharing
- **Follow-Up Systems:** Establish clear procedures for documenting decisions and ensuring implementation

Effective meeting management is a skill that develops with practice and experience. Focus on creating environments where members feel valued and heard, where business is conducted efficiently and transparently, and where decisions advance your PTA's mission.

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# Strategic Planning and Communication

Strategic planning transforms good intentions into actionable plans that advance your PTA's mission, while effective communication builds strong relationships and keeps members engaged. Rather than simply continuing previous activities, strategic planning ensures your efforts address current needs and create meaningful impact for children and families.

## Developing Your Annual Plan

Annual planning provides the foundation for everything your PTA accomplishes during your term. A well-developed plan guides decision-making, helps you allocate resources effectively, and ensures your activities work together to advance common goals.

## Community Needs Assessment

Understanding your community's actual needs, rather than assuming you know what families want, ensures your PTA's efforts address real challenges and opportunities.

## Methods for assessing community needs:

- **Family Surveys:** Conduct surveys at the beginning of the school year to understand parents' priorities, concerns, and interests while asking about barriers to participation and preferred communication methods
- **School Staff Input:** Meet with teachers, administrators, and support staff to understand their perspectives on student and family needs and areas where PTA support would be most valuable
- **Student Voice:** Include age-appropriate ways to gather student input about their interests, concerns, and ideas for school improvement
- **Community Partnerships:** Connect with other community organizations serving families to understand broader needs and identify collaboration opportunities

## Data sources to consider:

- **Academic Performance Information:** Review publicly available school report card data to understand academic strengths and challenges
- **Demographic Changes:** Consider how changes in your school community's composition might affect programming needs
- **Previous Year's Evaluation:** Analyze feedback from previous programs to understand what worked well and what could be improved
- **Resource Availability:** Assess your organization's capacity in terms of volunteers, funding, and community partnerships

## Setting SMART Goals

SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) provide clear direction and accountability while ensuring your efforts directly support PTA's mission.

## Components of effective PTA goals:

- **Specific Mission Connection:** Each goal should clearly relate to improving outcomes for children, supporting families, or strengthening your school community
- **Measurable Outcomes:** Define success in concrete terms that allow you to track progress and evaluate effectiveness
- **Achievable with Available Resources:** Set goals that stretch your organization while remaining realistic given your capacity
- **Relevant to Current Needs:** Ensure goals address genuine needs identified through your community assessment
- **Time-Bound Implementation:** Establish clear deadlines and milestones that create accountability

## Examples of strong PTA goals:

- "Increase family engagement in reading support by implementing monthly family literacy nights with 75% of participating families reporting increased confidence in helping their children with reading at home."

- "Improve school safety by organizing quarterly emergency preparedness workshops for families and advocating for improved crosswalk safety, resulting in measurable increases in family preparedness knowledge."

## Budget Development Process

Budget development translates your strategic goals into financial reality while ensuring fiscal responsibility and sustainability. For detailed procedures, consult the *Legal and Financial Handbook*.

### Budget alignment strategies:

- **Goal-Based Categories:** Organize budget categories around your strategic goals to ensure adequate funding for priority initiatives
- **Impact Investment:** Allocate more resources to programs that directly advance your mission and strategic goals
- **Reserve Planning:** Include adequate reserves for unexpected opportunities while maintaining financial stability
- **Evaluation Funding:** Budget for assessment activities that help you measure progress toward goals

For a sample budget with appropriate categories and formatting, see Appendix C of this handbook.

### Committee involvement in budget planning:

- **Program Budgets:** Ask each committee to develop detailed budgets for their planned activities
- **Priority Setting:** Involve committee chairs in discussions about organizational priorities
- **Resource Sharing:** Identify opportunities for committees to share resources or coordinate activities
- **Accountability Planning:** Work with committees to establish spending guidelines and approval processes

### Membership approval process:

- **Advance Distribution:** Provide draft budgets to members at least one week before the approval meeting
- **Clear Presentation:** Present budgets in formats that are easy to understand, with clear connections between spending plans and strategic goals
- **Question and Answer Time:** Allow adequate time for member questions to ensure informed decision-making
- **Amendment Procedures:** Understand how to handle proposed changes during the approval process

## Program Planning

Effective program planning ensures your activities achieve intended outcomes while providing positive experiences for participants and volunteers.

## National PTA Programs

National PTA offers several established programs that provide tested frameworks for local implementation:

- **Reflections:** Arts education program that encourages creativity while building connections between families and schools
- **Healthy Lifestyles:** Comprehensive approach to promoting physical wellness, mental health, and environmental awareness
- **PTA Connected:** Digital citizenship and online safety program that helps families navigate technology challenges
- **Back-to-School:** Resources and strategies for strong school year starts that build family engagement

### Implementation considerations:

- **Local Adaptation:** Modify national programs to meet your community's specific needs while maintaining core program elements
- **Resource Requirements:** Understand staffing, funding, and timeline requirements for successful implementation
- **Training Support:** Take advantage of National PTA training and resources to build necessary skills
- **Evaluation Integration:** Use National PTA evaluation tools to assess program effectiveness

## Calendar Coordination

Effective calendar coordination prevents conflicts, maximizes participation, and ensures your activities complement other community events.

### School Calendar Integration:

- **Academic Calendar Awareness:** Plan major PTA events around school breaks, testing periods, and other academic priorities
- **Teacher Support:** Coordinate with school staff to ensure PTA activities support rather than interfere with classroom instruction
- **Student Participation:** Schedule activities at times when students can participate appropriately

### Ohio PTA Event Calendar:

- **Summer Leadership Conference:** Plan for officer and committee chair participation in this essential training event
- **Regional Conferences:** Schedule attendance at fall regional conferences for training and networking
- **Annual Convention:** Plan for delegate participation in the state convention

**Community Event Coordination:** Coordinate with other community organizations to prevent conflicts and create opportunities for collaboration.

# Communication Strategy

Effective communication builds strong relationships, keeps members engaged, and positions your PTA as a credible voice for children in your community.

## Internal Communication

Internal communication keeps your PTA membership informed, engaged, and able to participate effectively in organizational activities.

### Communication channels:

- **Email newsletters** provide comprehensive updates about activities, opportunities, and achievements
- **Social media platforms** offer quick updates, visual content, and opportunities for member interaction
- **Website content** serves as a central information hub where members can access meeting minutes, event calendars, and important documents
- **Text messaging** delivers urgent updates and time-sensitive reminders
- **Print materials** reach families who prefer physical communication or lack reliable internet access

### Channel selection strategies:

- Survey members about their preferred communication methods and frequency to ensure your approach matches community needs
- Use email for detailed information requiring careful reading, such as budget updates or policy changes
- Leverage social media for visual storytelling, event promotion, and building excitement about PTA activities
- Reserve text messaging for urgent communications and important reminders requiring immediate attention

## Newsletter Development

Newsletters provide opportunities for comprehensive member communication while showcasing your PTA's activities and achievements.

### Content development strategies:

- Include information about upcoming events, volunteer opportunities, and ways members can get involved
- Feature student achievements, teacher spotlights, and success stories that highlight positive program impact
- Provide updates on advocacy efforts, policy changes, and opportunities for members to engage in issues affecting children
- Share financial updates, budget information, and transparency about how resources support your goals

## **Distribution best practices:**

- Maintain current email lists through the Givebacks platform, which provides integrated newsletter distribution and member database management
- Provide newsletter content in multiple formats including email, website posting, and print copies
- Schedule regular publication dates that members can anticipate, such as monthly newsletters or bi-weekly updates
- Use engaging subject lines and preview text that encourage email opening and reading

## **Social Media Guidelines**

Social media platforms offer powerful tools for community building while requiring careful attention to privacy, safety, and organizational policies.

### **Platform selection and management:**

- Choose social media platforms based on where your community members are most active
- Designate specific officers or volunteers to manage social media accounts with clear guidelines about posting authority
- Establish posting schedules that maintain regular engagement without overwhelming followers
- Create content calendars that align social media messaging with your overall communication strategy

### **Content guidelines:**

- Share photos and updates that celebrate student achievements, volunteer contributions, and successful programs while respecting privacy requirements
- Post information about upcoming events, volunteer opportunities, and ways community members can support children and education
- Engage with school and community content that aligns with your mission while maintaining your organization's non-partisan stance
- Use hashtags strategically to increase visibility and connect with broader conversations

### **Privacy and safety considerations:**

- Obtain proper photo releases before posting images that include identifiable children or community members
- Avoid sharing information that could compromise student or family privacy
- Follow school district policies regarding social media use and student privacy
- Monitor comments and engagement to ensure discussions remain respectful and aligned with your organization's values

## **External Communication**

External communication builds your PTA's reputation in the community while advancing advocacy goals and strengthening partnerships.

## **Media relations:**

- Research local media outlets that cover education and community issues
- Identify reporters who regularly cover education topics and introduce yourself as a resource for parent and family perspectives
- Provide timely, accurate information about your PTA's activities while respecting deadlines and formatting requirements
- Focus on stories that highlight student success, innovative programs, or community partnerships

## **Brand consistency:**

- Use official Ohio PTA and National PTA logos consistently across all materials while following National PTA's Visual Identity Standards
- Develop key talking points about your PTA's mission, achievements, and priorities for consistent use across communication channels
- Train officers and committee chairs to communicate consistent messages about organizational goals and activities
- Include required disclaimers and attribution for Ohio PTA materials while respecting intellectual property requirements

Your communication efforts directly impact your PTA's effectiveness in advancing its mission and serving children and families. Focus on building authentic relationships, maintaining consistent professional standards, and providing valuable information that helps community members understand and support your work.

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# **Community Partnerships and Advocacy**

Strategic partnerships amplify your PTA's impact while providing essential support for achieving your mission. Building collaborative relationships with school staff, community organizations, and local leaders creates networks that benefit children and families far beyond what your PTA can accomplish independently.

## **School Partnerships**

Your relationship with school administration and staff forms the foundation for most other PTA activities. Strong school partnerships create opportunities for program coordination, resource sharing, and collaborative advocacy while maintaining appropriate boundaries.

## **Building Effective Relationships with School Administration**

Establishing collaborative relationships with your principal and other school administrators sets the tone for your entire term and influences your PTA's effectiveness.

## **Key principles for administrator relationships:**

- Understand their priorities and goals for the school, and identify ways your PTA can support those objectives
- Communicate PTA's value by sharing specific examples of how PTA activities benefit student achievement and school operations
- Respect their educational expertise while positioning PTA as a supportive partner rather than an oversight body
- Maintain regular communication through scheduled meetings and updates about PTA activities

## **Meeting strategies for building partnership:**

- Schedule regular check-ins to discuss upcoming PTA activities and school priorities
- Share your PTA's annual goals and ask for input on how they align with school improvement plans
- Request guidance on school policies that affect PTA operations, such as facility use and volunteer requirements
- Discuss communication channels and determine the best ways to coordinate messaging to families

## **Collaborative opportunities:**

- Coordinate PTA events and programs with school calendar and educational priorities
- Share resources and expertise that support classroom instruction and school operations
- Work together on family engagement initiatives that complement school outreach efforts
- Collaborate on school safety and improvement initiatives that benefit from parent input

## **Collaborating with Teachers and Staff**

Teachers and school staff are valuable partners who can provide insights about student needs, classroom challenges, and opportunities for PTA support.

### **Effective collaboration approaches:**

- Recognize that teachers have professional expertise about education while PTA brings community perspective and resources
- Ask how PTA can support their classroom goals and student success rather than assuming you know what they need
- Respect their time constraints and workload by offering practical assistance rather than additional obligations
- Include teachers in PTA planning when appropriate, while understanding they may have limited availability

### **Ways to support teachers and staff:**

- Provide funding for educational materials, technology, or programs that directly support student learning

- Organize volunteer support for educational activities that enhance classroom instruction when requested by teachers
- Advocate for adequate funding, professional development, and working conditions that enable teachers to focus on student success
- Recognize their contributions through appreciation events that highlight educational impact

## Respecting Boundaries and School Policies

Maintaining appropriate boundaries ensures productive partnerships while avoiding conflicts that can undermine your PTA's effectiveness.

### Understanding PTA's role:

- PTA advocates for policies and resources that benefit students but does not direct school operations or curriculum decisions
- PTA provides input and feedback to school administration but respects their professional authority and decision-making responsibility
- PTA supports school programs and staff but maintains independence to advocate for policies that may differ from current practices

### Policy compliance requirements:

- Follow all school district policies regarding facility use, volunteer background checks, and visitor access
- Understand communication guidelines that determine how PTA can share information through school channels
- Comply with safety and security procedures for all PTA events and activities on school property
- Respect student privacy and confidentiality policies in all PTA communications and activities

## Community Partnerships

Strategic community partnerships expand your resources, reach new audiences, and create opportunities for collaborative programs that benefit more families than your PTA could serve independently.

### Identifying Potential Partners

Effective partnership development starts with understanding what organizations, businesses, and groups in your community share your commitment to children's welfare and family support.

### Types of potential partners:

- Local businesses that want to support education and community development
- Nonprofit organizations serving families, children, or education-related causes
- Community service organizations, clubs, and faith-based groups with family-oriented missions
- Government agencies and elected officials focused on child welfare and education issues
- Healthcare organizations providing services to children and families

- Cultural organizations, libraries, and recreational programs that serve your community

## Building Collaborative Relationships

Strong partnerships develop through relationship building that demonstrates mutual benefit and shared commitment to common goals.

### Relationship development strategies:

- Attend community events and meetings where potential partners gather to understand their priorities and interests
- Invite potential partners to PTA events and meetings to learn about your organization's work and impact
- Propose specific collaboration opportunities that clearly benefit both organizations and the families you serve
- Start with small, low-risk partnerships that allow organizations to build trust and understanding before committing to larger initiatives

### Partnership benefits:

- **Resource expansion:** Access to expertise, materials, and funding that enhance your programming
- **Audience reach:** Connection to families and community members who may not currently participate in PTA
- **Skill development:** Learning opportunities for volunteers through collaboration with professional organizations
- **Community impact:** Broader influence on policies and practices that affect children and families

## Advocacy and Civic Engagement

Advocacy is central to PTA's mission and provides opportunities for families to develop civic engagement skills while working for positive change in their communities.

### Local Advocacy Opportunities

Local advocacy often has the most direct impact on your school community while providing accessible opportunities for families to develop advocacy skills.

### Common local advocacy focus areas:

- School funding issues including levies, budget allocations, and resource priorities
- School safety improvements such as traffic patterns, facility security, and emergency preparedness
- Curriculum and program access ensuring all students have opportunities for enriched learning experiences
- Family engagement policies that support meaningful parent involvement in school decision-making

- Student support services including mental health resources, special education, and intervention programs

## Getting started with local advocacy:

- Attend school board meetings regularly to stay informed about issues affecting your school
- Build relationships with school board members and district administrators through respectful engagement
- Monitor local media and community discussions about education issues that affect your school
- Connect with other parent organizations and community groups working on similar issues

## Legislative Engagement

State and federal legislation significantly affects education funding, policies, and programs that impact your school community.

### Basic legislative engagement activities:

- Sign up for VoterVoice through the Ohio PTA website (ohiopta.org) to receive action alerts
- Participate in action alerts by contacting legislators about specific issues affecting children and education
- Meet with your state legislators during district office hours or at community events to discuss education priorities
- Attend legislative forums and candidate events to learn about positions on education issues
- Share personal stories with legislators about how policies affect your family and school community

## Non-Partisan Requirements

PTA's non-partisan status is essential for maintaining credibility and tax-exempt status while enabling advocacy work on behalf of all children.

### Non-partisan guidelines:

- PTA can take positions on issues and policies but cannot endorse or oppose candidates for public office
- Focus advocacy efforts on specific legislation, policies, and issues rather than supporting particular political parties
- Ensure all advocacy activities serve the interests of children and families rather than advancing partisan political agendas
- Maintain professional, respectful relationships with elected officials from all political parties

For comprehensive guidance on advocacy strategies, legislative engagement, and campaign procedures, consult the *Advocacy Handbook*.

Building strong community engagement and partnerships requires ongoing attention and relationship maintenance, but the benefits justify the investment. Focus on developing authentic relationships based

on shared commitment to children's welfare, and you'll create a network of support that strengthens your PTA's effectiveness and multiplies your impact in the community.

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## Conclusion

Your decision to serve as a PTA officer represents a commitment to making every child's potential a reality in your school community. Through this handbook, you have gained the foundation needed to lead effectively while staying true to PTA's mission and values. The knowledge and tools provided here will support you as you navigate the responsibilities and opportunities that come with PTA leadership.

### Key Takeaways for New Officers

Successful PTA leadership builds on fundamental principles that guide effective decision-making and sustainable organizational growth. Understanding that PTA's strength lies in its mission-focused work helps you maintain perspective about what truly matters. Your role exists to support children, strengthen families, and improve schools and communities through collaborative advocacy and programming.

**Collaboration and teamwork** form the foundation of effective PTA work. No officer succeeds in isolation, and the most impactful PTAs are those where officers support each other, communicate regularly, and share both responsibilities and recognition. Building strong relationships with fellow officers, committee chairs, school staff, and community partners multiplies your effectiveness while making the work more sustainable and enjoyable.

**Planning and preparation** prevent most common challenges that new officers face. When you establish clear systems for compliance, communication, and financial management early in your term, you can focus your energy on mission-driven activities rather than crisis management. Regular planning, documentation, and evaluation create the foundation for continued success.

**Transparency and accountability** build the trust necessary for effective advocacy and community support. Maintaining open communication with members, following proper procedures for decision-making, and demonstrating responsible stewardship of resources establishes your PTA's credibility with families, school staff, and community partners.

**Focus on mission and impact** keeps your efforts aligned with PTA's fundamental purpose. When you consistently connect activities and decisions to student success and family engagement, you maintain the clarity of purpose that motivates volunteers and attracts community support.

### Your Path Forward

Your journey as a PTA officer begins with understanding your role and responsibilities, but it continues with ongoing learning and leadership development that benefits both your current position and your future contributions to children and families.

**Immediate next steps** include familiarizing yourself with your unit's bylaws and standing rules, establishing regular communication with fellow officers and key volunteers, setting up systems and

calendars needed for effective compliance and program management, and connecting with your Ohio PTA Region Advisor to understand available support and resources.

**Building your leadership skills** involves participating in Ohio PTA training opportunities including Summer Leadership Conference, Regional Conferences, and Annual Convention. The Gold Key Leadership Award Program provides structured leadership development with recognition for your commitment to learning and growth. Online resources through Thrive PTA Learning Community offer convenient access to training on specific skills and topics relevant to your role.

**Developing organizational capacity** means documenting your work through procedure books that will help your successors, identifying and mentoring potential future leaders who can continue your PTA's important work, building sustainable systems and partnerships that outlast individual officer terms, and contributing to the broader PTA community through sharing successful strategies and supporting neighboring units.

**Available support systems** ensure you are never alone in your leadership journey. Your Ohio PTA Region Advisor provides personalized guidance based on knowledge of your local community and challenges. The Ohio PTA office offers technical assistance, resource access, and expertise on compliance and organizational questions. Fellow officers in your unit and neighboring PTAs understand the day-to-day realities of volunteer leadership and can provide practical advice and moral support.

## Mission Connection

Every aspect of your work as a PTA officer directly supports the mission to make every child's potential a reality by engaging and empowering families and communities to advocate for all children. This connection between daily tasks and meaningful impact helps sustain your motivation and demonstrates the importance of your volunteer service.

**Meeting management and governance** create opportunities for families to participate in decisions affecting their children's education while building democratic engagement skills that benefit our communities. When you facilitate inclusive, productive meetings, you model collaborative leadership and ensure diverse voices contribute to important decisions.

**Financial stewardship** protects the resources that enable your PTA to support students, families, and educational improvements. Your careful attention to budgets, compliance, and transparency ensures that every dollar contributed by members and community supporters advances programs that benefit children.

**Communication and community building** strengthen the networks that support student success while building advocacy capacity for policy changes that benefit all children. Your efforts to welcome new families, share information effectively, and build partnerships extend PTA's influence far beyond your individual school.

**Strategic planning and program development** translate PTA's mission into concrete actions that improve children's educational experiences and family engagement opportunities. When you connect programming to genuine community needs and educational goals, you demonstrate PTA's value to families, educators, and community leaders.

**Compliance and legal responsibilities** protect your organization's ability to advocate effectively while maintaining the trust and credibility necessary for policy influence. Your attention to these requirements preserves the legal protections and tax benefits that enable PTA to work on behalf of all children.

**Leadership development and volunteer engagement** build the capacity needed for sustained advocacy and program delivery. When you mentor new volunteers and create meaningful opportunities for participation, you strengthen PTA's ability to serve children and families for years to come.

The impact of your service extends far beyond your term of office and your individual school community. Every child who benefits from programs you support, every family that gains advocacy skills through PTA participation, and every policy improvement that results from collective PTA efforts represents the lasting difference your leadership makes.

Your commitment to PTA leadership demonstrates your belief that every child deserves advocates working on their behalf. As you begin this journey, remember that you join a network of dedicated volunteers who share your commitment and will support your success. Together, we continue PTA's vital work of making every child's potential a reality.

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## Resources

### Ohio PTA Support

#### Ohio PTA Office

40 Northwoods Blvd, Suite A  
Columbus, Ohio 43235-4718  
Phone: 614-781-6344 • 800-699-6628  
Email: [office@ohiopta.org](mailto:office@ohiopta.org)  
Website: <https://www.ohiopta.org>

For questions about PTA leadership, compliance requirements, and organizational support, reach out to your Ohio PTA Region Advisor or contact Ohio PTA at [office@ohiopta.org](mailto:office@ohiopta.org).

### Training Opportunities

#### Ohio PTA Training:

- Ohio PTA Summer Leadership Conference
- Ohio PTA Regional conferences and workshops
- Ohio PTA Annual Convention
- Gold Key Leadership Award Program (<https://www.ohiopta.org/awards/gold-key/>)

#### National Training Resources:

- National PTA Convention
- Thrive PTA Learning Community courses (<https://thrive.pta.org>)

- National PTA Local Leader Kit (<https://www.pta.org/home/run-your-pta/local-leader-kit-access>)
- National Standards for Family-School Partnerships training (<https://www.pta.org/home/run-your-pta/family-school-partnerships>)
- National PTA School of Excellence Program (<https://www.pta.org/home/programs/National-PTA-School-of-Excellence>)

## Online Resources

### Primary Resources:

- National PTA website: <https://www.pta.org>
- Ohio PTA website: <https://www.ohiopta.org>
- Thrive PTA Learning Community: <https://thrive.pta.org>
- Givebacks platform support: <https://support.givebacks.com>

### Compliance and Filing Resources:

- File990.org for free IRS filing: <https://www.file990.org>
- Ohio Attorney General charitable registration: <https://charitableregistration.ohioattorneygeneral.gov>

# Appendix

The following appendices provide essential templates, procedures, and reference materials to support the leadership guidance in this handbook. These documents are available as separate resources and can be customized for your unit's specific needs.

## Appendix A — [Sample Meeting Agenda](#)

Standard meeting agenda format that can be adapted for general membership meetings, officer/board meetings, or committee meetings with appropriate modifications for each meeting type.

## Appendix B — [Sample Meeting Minutes](#)

Comprehensive meeting minutes template that captures required elements for legal compliance and organizational record-keeping, adaptable for all meeting types with proper documentation standards.

## Appendix C — [Sample PTA Budget](#)

Annual budget template with appropriate revenue and expense categories, formatting guidelines, and calculation formulas for PTA use, designed to align with strategic goals and compliance requirements.

## **Appendix D — [Sample Monthly Treasurer's Report](#)**

Standard format for monthly financial reporting to board and membership meetings, including all required elements and proper categorization of income and expenses for transparency and accountability.

## **Appendix E — [Financial Review Procedures and Guide](#)**

Step-by-step procedures for conducting annual financial reviews, including committee requirements, document examination processes, and financial review report template for compliance with Ohio PTA Standards of Affiliation.

## **Appendix F — [Ohio PTA Standards of Affiliation Checklist](#)**

Complete checklist of all nine Standards of Affiliation requirements with deadlines, responsible parties, and documentation needed to maintain good standing with Ohio PTA throughout the year.

## **Appendix G — [Sample Officer Procedure Book](#)**

Template for creating comprehensive procedure books that document officer responsibilities, processes, and institutional knowledge for smooth leadership transitions and organizational continuity.

## **Appendix H — [Leadership Transition Checklist](#)**

Comprehensive checklist for outgoing and incoming officers to ensure complete transfer of responsibilities, documents, and organizational knowledge during leadership transitions.

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### **Disclaimer**

This handbook provides general guidance and should not be considered legal advice. For specific legal questions, consult with qualified legal counsel. Ohio PTA provides this information as a service to our members and cannot guarantee its accuracy or completeness. Individual circumstances may require different approaches than those outlined in this handbook.

### **Last Updated**

Last Updated: July 2025

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