

Go Big or Go Home- **How to be a Confident Effective President**

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Ohio PTA President 2026-2027



PTA 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.



PTA Values

- Collaboration
- Commitment
- Diversity
- Respect
- Accountability



Did you know???

Your PTA is an independent nonprofit association.

Your PTA is an advocacy organization—not a booster organization.

Your PTA supports your state and National PTA—and vice versa.



PTA Board and Responsibilities

- **Duty of Care.** Each board member has a legal responsibility to participate actively in making decisions on behalf of your PTA and to exercise his or her best judgment while doing so.
- **Duty of Loyalty.** Each board member must put the interests of the organization before their personal and professional interests when acting on behalf of the organization in a decision-making capacity. Your PTA's needs come first.
- **Duty of Obedience.** Board members bear the legal responsibility of ensuring that your PTA complies with the applicable federal, state and local laws and adheres to its mission.



PTA Board and Responsibilities

- **Focus on and evaluate your goals.** Your board should have overall goals for the year that are in line with **PTA's mission**, including membership goals. Regularly assess progress toward those goals.
- **Set the tone.** Maintain a positive working relationship among your PTA board members and a welcoming environment for the rest of the membership. For more info, see **Leading the PTA Way**.
- **Know and follow your organization's bylaws, as well as applicable state and federal laws.** These are the rules your PTA will follow.



PTA Board and Responsibilities

- **Know your finances.** As a first step, you'll need to approve and oversee your **budget**.
- **Plan for rotation and transition.** Your PTA board will grow stronger when you consistently recruit new members and leaders. Know when your term ends, and plan for a smooth transition by saving reports, files and notes for your successors.



President's Responsibilities

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- Chairing board and general meetings
- Overseeing fiscal compliance
- Serving as a liaison with school administration or community partners
- Checking in regularly with officers and committees to ensure the overall plan is on target



President's Responsibilities

- Identifying challenges and inviting solutions
- Familiarizing yourself with all PTA programs and resources
- Representing PTA to the community
- Recruiting and mentoring volunteers and future leaders
- Volunteering at events, when available



A President's First 30 Days

Gather Your PTA's Documents

- Your PTA's Bylaws
- Your PTA's Standing Rules
- Procedures Books
- Most recent Financial Review
- Bank statements and electronic access



A President's First 30 Days

Listen

- Convene with outgoing president and officers
- Introduce yourself to the school personnel and administration
- Introduce yourself to families and members of your PTA



A President's First 30 Days

Protect

- Your unit is a 501 (c) (3) nonprofit so ask the immediate past president and treasurer for the most recent IRS Form 990 filing.
- Change the signatures on your PTA's bank accounts.
- Bonding Insurance



Working with the Board

- Take it seriously- this is a job
- Embrace Change
- Set the tone by saying the mission
- Accept that your term will not go exactly as planned
- Leave a legacy of leadership
- Value everyone's time, talent, and treasure
- Define what success looks like for this board as it is
- Adjust and be flexible
- Share opportunities among board members
- Be so for real



The Power of PTA is Connection

Membership isn't just a number. It's the measure of how many families trust PTA enough to invest in it. The connection starts with you: one event, one conversation, one personal ask.

Lead with impact, not dues. Show families what their membership funds make possible. Specific wins beat general appeals every time.



Making PTA Connections

- Family Engagement Support
- Leadership Support
- Advocacy
- Membership



Next Steps

- Get Organized
- Learn Your Bylaws and Standing Rules
- Plan out your first meeting
- PTA Calendar



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SETLIST President's Checklist 2026-2027

Complete this if your immediate past president did not

- Report your ANNUAL VOLUNTEER HOURS for 2025-2026

Standards of Affiliation Requirements

- List Officers, Committee Chairs, and Admin in Givebacks
- IRS Form 990
- Financial Review
- Charitable Solicitation Act Registration
- Membership Dues
- Updated Bylaws

Read and adopt these policies at your first general meeting to set your unit up for a successful year

- Social Media Policy
- Code of Ethics and Conflict of Interest Policy

Required per your bylaws

- Financial Review
- Bonding Insurance

End the Year Strong

- Report your ANNUAL VOLUNTEER HOURS for 2026-2027
- List Officers and Committee Chairs in Givebacks for 2027-2028



Questions

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