**President**

Prior to Taking Office

To ensure a successful term of office, certain responsibilities begin as soon as new officers are elected:

The president-elect should confer with the school principal and call meetings, as necessary, of the board-elect (elected officers and principal) soon after election to fill any vacant offices and make plans for the coming year. When appointed officers are ratified, they become part of the board-elect.

Hold brainstorming session(s) with the current board and board-elect to establish unit goals. Review past unit activities, become familiar with California State PTA goals and Purposes, set realistic goals and prioritize projects. Evaluate current chairman positions and decide which are needed. Ask for suggestions of people to fill chairmanships.

Ensure Vice Presidents start recruiting chairmen and committee members prior to Fall. Become familiar with the duties of each chairman by discussing positions without going president. Ideally there should be descriptions and materials for chairmen to help them as the outgoing chair should be requested to document procedures.

Names and addresses of additional executive board members should be sent to 3rd district PTA for their respective directories and the school secretary.

Prior to taking office, request the outgoing president’s procedure book and review all agendas, meeting minutes and be well acquainted with by laws (especially quorum amount for board meetings and general meetings). Look over insurance booklet to be aware of what activities are safe and covered under insurance. Understand the budget and the purpose of each line item.

Coordinate with treasurer-elect to have the signature cards for bank accounts updated with new officers and submitted to the bank at the beginning of the new term.

Work with Board Secretary to prepare a master calendar that includes executive board meetings, association meetings, PTA special events, and president/principal meetings. We use shutterfly for board meetings and prepare a separate word document for the parents of the PTA calendar of events which we post on the pta website and hand out during registration day (paper parade).

Obtain a master list of all passwords for the PTA website, PTA electronic newsletter, PTA fundraising sites, and Quick books.

During Office:

Be sure a signed facility use permit is on file, if required by the school district. **Never sign a Hold Harmless Agreement on behalf of the PTA**. If the PTA is asked to sign a [Hold Harmless Agreement](http://toolkit.capta.org/finance/policies-and-procedures/hold-harmless-agreement/) for any reason, the PTA should contact the California State PTA insurance broker. When directed by the insurance broker to sign the “Facilities Use Permit Addendum” for events held on public school campuses.

When planning PTA events and activities you must always refer to the *Insurance and Loss Prevention Guide* that is updated and mailed annually to all unit presidents. If you have any questions or concerns about the event contact the California State PTA insurance broker. Contact information for the California State PTA insurance broker can be obtained from the California State PTA office.

Appoint a committee to review and/or revise the bylaws.

Confer with officers and chairmen regarding plans for the year and progress toward set goals. What are the fundraising goals? What are the program goals? How and when do you expect information about progress?

Ensure all officers/chairmen in understand their duties, chairmen reporting to them and fulfilling their responsibilities as board member. Ensure they understand the budgeted amounts for each chairmen/committee and that they communicate this to their chairmen. It is their duty to ensure their committees stay on budget or notify the board PRIOR TO if a PTA activity will require more funds. This will require a vote by the board and the general pta. Promote PTA officer/chairmen use of the PTA websites: [www.capta.org](http://capta.org/) and [www.pta.org](http://pta.org/).

Ensure Membership VP confirms membership enrollment activities are approved by the principal and do not interfere with school activities. Membership enrollment begins at registration (paper parade) in August and Ends in October with the Spaghetti feed (membership vp) .All members must receive a membership card which can be obtained from 3rd district in Sacramento. Remind each member to sign the card. Remind the membership chairman to insert the October 31 expiration date on each card.

Schedule a budget committee meeting with the principal and officers (treasurer and fundraising vp) whose input to the budget is important. Verify that programs and fundraising activities comply with insurance guidelines. Have the proposed budget, including programs, fundraisers, and other plans, presented to the executive board in September.

The association must approve the proposed budget in October, including programs, fundraisers, and other plans, before implementation or check can be written (which includes the signing of contracts). A motion for each fundraiser, including how the money will be used (books for the library, etc.), must be approved by the association. This should be done at the first association meeting in October .

Remind the treasurer to send the per capita portion of dues for council (if in council), district, State and National PTA through channels each month; to submit insurance premiums by the district PTA due date; to prepare and submit the mandatory Workers’ Compensation Annual Payroll Report through channels by the due date ([Workers’ Compensation Annual Payroll Report](http://toolkit.capta.org/finance/reports-and-forms/workers-compensation-annual-payroll-report/)).

Remind the treasurer to schedule audits of the financial books twice a year ([PTA Audit](http://toolkit.capta.org/finance/pta-audit/); [Audit Report](http://downloads.capta.org/toolkit/forms/AuditReport.pdf)) and to determine whether the council or district PTA requires a copy of the Annual Financial Report ([Annual Financial Report Form](http://toolkit.capta.org/finance/reports-and-forms/annual-financial-report/)).

Conduct board meetings and general pta meetings. Check with PTA Secretary to be sure meeting room arrangements are confirmed. Work with the VP of communication to prepare meeting notices and publicity regarding General PTA Meeting.

Prepare a monthly article for the PTA newsletter regarding the activities of the PTA, fundraising progress and volunteer recognition.

Prepare the agenda for the meeting ahead of time, and provide copies to the secretary and board members ([The Agenda](http://toolkit.capta.org/running-your-pta/meetings/the-agenda/); [Sample Agenda and Meeting Planner](http://toolkit.capta.org/running-your-pta/meetings/sample-agenda/)). Have Secretary post the agenda in the kiosk and send via e-news with meeting promotion material. Ensure Secretary posts meeting minutes and the Treasurer posts their report in the school kiosk 2 weeks prior to each general pta meeting. Inform parents of the location of this information in e-news, press and any other meeting promotional material.

Sign reimbursement forms and checks per the request of PTA Treasurer. Request that the Treasure report actual in the before winter break and after spring break to get a snap shot of what is happening with parent donations.

Check bylaws for the procedures to elect the nominating committee, and include that election on the appropriate month’s agenda.

End of Term

At the last association meeting of the school year, a motion should be made authorizing the executive board to pay necessary summer bills. Recognize volunteers all outstanding parent volunteers at the last association meeting with the help of the VP of communications.

See that outstanding bills have been paid, committee reports have been filed, projects have been completed and financial books are scheduled for audit.

Be certain that any correspondence, including thank you notes and acknowledgments, have been sent.

Meet with incoming President and Treasurer to pass along necessary knowledge from prior year.

When the term as president is completed, stay involved but not in charge.