

Congratulations on your election as a local unit PTA officer! Your position is important to every child in your school community. Being a PTA officer brings with it a great deal of responsibility as well as many rewards. You will learn that serving as a PTA officer is a wonderful experience – an enriching, fulfilling, sometimes frustrating, but priceless opportunity – for you as an individual, as a leader and as a member of your community.



Getting Started – What do I do first?

Take a deep breath! Get a cup of coffee (or tea) and read this information. Gather the materials listed below and meet with your board this spring and summer to plan for the coming year. Take it one step at a time. The first step is most often the hardest. Call a State PTA Board member if you need guidance, support, or reassurance.

- ✓ Talk with the outgoing president and officers about the PTA's status and seek their recommendations. Verify the existence of required documentation. (*see below*)
- ✓ Verify that the outgoing secretary has submitted a list of incoming officers to the state office upon election, but no later than June 1. If not, do so immediately!
- ✓ Meet with the school principal to find areas of common interest and concern. Learn about the school's goals and share your objectives for PTA. Establish a good working relationship right from the start by opening a channel of communication.
- ✓ Make opportunities available to officers to attend training and leadership development events offered by Montana PTA. Stress the importance of attending the Montana PTA Convention in the fall. Check to insure that the current budget covers attending the convention for at least your newly elected officers. If not, request that the budget be amended before school ends.
- ✓ Thank the outgoing officers and explain how their continued service would be of help as you plan for the coming year.
- ✓ Make sure that a financial review of your PTA's books will be properly conducted at the end of the outgoing officers' term and the IRS reports are filed when due. (*Don't panic if you don't understand what this means. See the Quick MPTA Financial Tips document on the MT PTA website under Unit Tools in the "TREASURER – Financial Section" for more information.*)
- ✓ Change the signers on the PTA's bank accounts. Make sure that if you have multiple accounts, you update signers on all accounts.

FOR YOUR (REQUIRED) READING PLEASURE

The following documents are needed to run your PTA effectively. Make sure you have them when you begin your planning for the coming year. If any of these important documents are missing, work with your predecessor and other members to replace or recreate them. If you need help, contact the Montana PTA office.

- ✓ List of local PTA board members, addresses, phone numbers and e-mail addresses.
- ✓ Set of unit and state PTA newsletters for at least the past year.
- ✓ Set of minutes for last two years' board and membership meetings.
- ✓ Treasurer's reports for at least the past year.

- ✓ Financial Audit reports for at least the past year.
- ✓ Current version of the Local Unit PTA Bylaws provided by Montana PTA.
- ✓ Local PTA unit Standing Rules.
- ✓ Local PTA procedure book for the PTA officers.
- ✓ Last year's PTA reports and/or plans of work and results.
- ✓ Last year's PTA budget.
- ✓ Last year's calendar of events/activities.
- ✓ ***PTA President's Quick-Reference Guide*** and ***PTA Fundraising Essentials***

WHAT YOU SHOULD KNOW ABOUT PTA

To lead a PTA unit with confidence, you should first read the PTA vision, mission, values, and purpose. PTA is a nonprofit organization that has dedicated itself to advancing the well being of children, youth, and families for over 100 years. **PTA is an advocacy organization speaking for every child.**

As a local PTA member, you are part of the National PTA and join over 5 million members nationwide. Each local unit is also part of the Montana PTA, which has nearly 90 local units representing nearly 5500 members! The Montana PTA and National PTA supply local units with information and resources that help your members contribute to the nationwide effort to improve the health, safety, welfare and education of every child.

Member → Local Unit PTA → Council PTA → Montana PTA → National PTA

Training and planning will be one of the most important contributors to your PTA's success!

Visit the Montana PTA website (www.montanapta.org) and the National PTA website (www.pta.org) for a wealth of resources.