

Steps That Insure Success of a Local PTA Unit

- ✓ All PTA officers should have a copy of:
 - Uniform Bylaws
 - Local unit Standing Rules
 - ◆ Remember local unit Standing Rules can be amended at any time by the General Membership if notice is given prior to the General Membership meeting
 - PTA Fundraising Guidelines
- ✓ All PTA officers should have a PTA notebook with pertinent PTA information including:
 - Information from the National PTA Quick Reference Guides
 - ◆ The president needs to be familiar with all sections of the Quick Reference Guides
 - ◆ The treasurer needs to particularly read and the Money Matters Quick Reference Guide
 - Information from the Montana PTA Unit Tools section of the MT PTA Website
- ✓ The PTA should have a goal setting session prior to beginning of PTA work-year
 - Goals are set with the input of all types of members – parents, teachers, and administration
 - ◆ Limit the number of goals to a realizable number
 - ◆ Follow up and evaluate realization of goals
- ✓ The PTA should create a budget based on the goals
 - Remember that the budget is the document that gives the local unit officers the authority to spend local unit financial resources
 - Remember budgets can be amended at any time by the General Membership
 - ◆ The local unit budget should include funds for leadership training at either the Montana PTA Annual Convention or the National PTA Annual Convention
 - ◆ The local unit treasurer should set up a voucher system for the payment of local unit expenses
- ✓ The local unit president should prepare a meeting agenda for each meeting of the Executive Committee (all elected officers of the local unit) and the General Membership
- ✓ The local unit treasurer should prepare a Treasurer's Report for each Executive Committee and General Membership meeting.
- ✓ The local unit secretary should take minutes of all Executive Committee and General Membership meetings
- ✓ A meeting of the local unit Executive Committee (all elected officers) should be held once a month at a minimum
- ✓ Local unit General Membership meetings should be organized around an event, activity or program
 - General Membership meetings should be scheduled in advance during the goal-setting session
 - The business portion of a general membership meeting should be concise
 - Committee work should not be done in either a Executive Committee or General Membership meeting
- ✓ Because the Nominating Committee is the MOST important committee for the continuance of the PTA, great care should be taken in the nominating and election of PTA members to the Nominating Committee