

TRENTON DIOCESAN  
PTA  
PRESIDENT'S HANDBOOK



A WORKSHOP ON PAPER

## A HANDY REFERENCE

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The following is a general outline to help you, as President, familiarize yourself with the terminology and procedures of the position of President. The mastery of this knowledge, plus your own common sense, will enable you to achieve the degree of leadership you desire.

## **P.T.A. PRESIDENT – A LEADER OF A DIOCESAN SCHOOL P.T.A. UNIT**

### **I. Definition of a leader**

The dictionary definition appropriate for a P.T.A. President is; to lead, to show the way. A good leader understands the position, has the ability to carry out the objectives of the position, and is able to attract and sustain enthusiastic co-workers.

### **II. Desirable qualities of a P.T.A. President**

- A. Reasonable good physical health
- B. Positive mental attitude toward self and life in general
- C. Industrious and enthusiastic, includes willingness to work, consistency of effort, originality in attacking problems.
- D. Cheerfulness and sensitivity, the ability to see the humor in situations and to be comfortable around people
- E. Sense and fairness. Common sense, open to all sides of a situation.

### **III. Responsibilities of a President**

- A. Acquisition of knowledge necessary for leadership
  - 1. Thorough understanding of the Constitution and By-Laws
  - 2. Thorough understanding of the Structure of P.T.A.
    - a. Diocesan Advisory Board (Moderator's working board, policy making, meets once every other month during school year.)
    - b. Diocesan Executive Board (President's working board, meets twice a year, spring and fall.)
    - c. Regional Executive Board (Regent's working board, meets twice a year, spring and fall.)
    - d. Unit Executive Board (President's working board, meets once a month during the school year.)
  - 3. Responsibilities to the Regional Level of P.T.A.
    - a. Dates and times of Regional Conferences, President's Meetings.
    - b. The proper representation of your unit at these Conference and meetings.
    - c. A working knowledge of the Chairmanships of the Regional Board, their duties, and what you must do to facilitate the accomplishment of their duties, e.g.

1. Knowledge of all forms, dates due, and information needed.
  - a. Diocesan Questionnaire: Due to Regent by MAY 15<sup>th</sup> – You will receive this form at your Spring Regional Meeting. It must be filled out by you and signed by you and your principal or pastor.
  - b. Accountability Form: For Gold Medal Performance – Due by May 15<sup>th</sup>. Also received at the Spring Regional Conference. A copy of this form will be given out in the beginning of the school year to acquaint you with Diocesan Gold Medal Performance requirements. This is designed, not as a competition, but to help us improve our units in the areas that will make them more effective tools for Catholic Education.
2. Submission of information at the proper time.

**Structure – Trenton Diocesan Parent-Teacher Association**

**Bishop of Trenton**

**Diocesan Moderator**

**Advisory Board (Policy Making)**

Moderator	2 Past Regents-Burlington
President	2 Past Regents – Monmouth-Ocean
2 Past Presidents	2 Past Regents - Trenton

**Diocesan Executive Board**

<b>Moderator</b> Principal Advisor President	<b>Officers</b> Treasurer Recording Secretary Corresponding Secretary 2 Vice Presidents (Past Presidents)	<b>Chairpersons</b> Legislative Membership Others	<b>Regional Reps.</b> (from each region) 1. Past Regent 2. Moderator 3. Principal Advisor 4. Regent
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**Burlington  
Regional Executive Board**

<b>Moderator</b> Principal Advisor Regent	<b>Officers</b> Treasurer Rec. Secretary Corr. Secretary Vice Regents	<b>Chairpersons</b> Legislative Membership Others
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**Trenton  
Regional Executive Board**

<b>Moderator</b> Principal Advisor Regent	<b>Officers</b> Treasurer Rec. Secretary Corr. Secretary Vice Regents	<b>Chairpersons</b> Legislative Membership Others
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**Monmouth-Ocean  
Regional Executive Board**

<b>Moderator</b> Principal Advisor Regent	<b>Officers</b> Treasurer Rec. Secretary Corr. Secretary Vice Regents	<b>Chairpersons</b> Legislative Membership Others
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**Unit – Executive Board**

<b>Moderator</b> Principal Advisor President	<b>Officers</b> Treasurer Rec. Secretary Corr. Secretary Vice Presidents	<b>Chairpersons</b> Legislative Membership Others
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**Unit – Executive Board**

<b>Moderator</b> Principal Advisor President	<b>Officers</b> Treasurer Rec. Secretary Corr. Secretary Vice Presidents	<b>Chairpersons</b> Legislative Membership Others
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**Unit – Executive Board**

<b>Moderator</b> Principal Advisor President	<b>Officers</b> Treasurer Rec. Secretary Corr. Secretary Vice Presidents	<b>Chairpersons</b> Legislative Membership Others
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3. Assimilation of all information given to you and dissemination of same to the proper areas of your unit.
4. Payment of Per Capita Tax to Regional Treasury by designated time (Nov. 1)
  1. Per Capita Tax: The amount of monies taken from each member's dues, which is then divided between the Regional and Diocesan Treasuries and used for operational expenses. At this printing the per member assessment is fifty cents, twenty-five cents to the Regional Treasury and twenty-five cents to the Diocesan Treasury. These monies are used in a number of different ways. Probably the largest expenditure is communication. The Diocesan P.T.A. covers a large area. To maintain our unity and strength and to help each other grow, requires contact through the written word and through personal contact, either by phone or by attendance at meetings, workshops, and the like. P.T.A. Dues are \$2.00 per member or \$4.00 per family. Fifty cents per member is sent to your REGIONAL TREASURER by November 1<sup>st</sup>. The check should be made out to your Regional P.T.A. A second membership letter should be sent out in December to those families that have not joined. Some schools take their membership dues out of their activity fee at the beginning of the school year. This is left up to the discretion of the pastor.
4. Responsibilities to the Diocesan Level of PTA
  1. Date and time of Annual Diocesan Conference
  2. The proper representation of your unit at Conference
  3. Assimilation of all information given to you and dissemination of same to the proper areas of your unit.
5. Responsibilities to the unit level of P.T.A.
  - a. A working knowledge of Roberts Rules for conducting meetings.
    1. Points helpful to you.
      - a. Corrections to minutes are made without a motion.
      - b. Motion is made to adopt financial report only when it has been formally audited.

- c. If committee report contains a recommendation, reporting member moves that recommendation be adopted. Otherwise report is filed without action.
- d. Handling Motions:
  1. Member asks to be recognized by chair. It is recommended they address "Madame or Mr. President."
  2. After recognition, member states motion, "I make a motion that \_\_\_\_\_."
  3. Second member then seconds the motion. This member need not stand or be recognized by chair.
  4. President then says, "The motion has been made by (name of mover) and seconded that (repeating motion as it was stated.) Is there any discussion?"
  5. When discussion stops, "if there is no further discussion all those in favor, say Aye, all those opposed, say No.
  6. The ayes (or noes) have it. The motion is carried (defeated)
  7. A motion may be amended by following the same procedure: After recognition by chair, "I move to amend the motion to \_\_\_\_\_" I second the motion to amend. It has been proposed to amend the motion to read as follows: Is there any discussion? If not, all in favor of the amendment, etc.
  8. If the amendment is approved, the motion is presented again, including the change, for approval.
- b. Knowledge of ways to conduct a good meeting.
  - a. Preparing an agenda: An agenda is an outline of the progress of a meeting and is an important tool for the success of the meeting. The agenda identifies the issues to be dealt with and provides for orderly discussion. By following your agenda you are able to

keep your meeting on track and within a planned time frame.

Developing the agenda is the joint responsibility of the president and the principal. It is helpful to contact your board members and committee chairmen and to consult your working calendar and past minutes when planning your agenda.

A copy of the agenda is sent to each member of your executive board, giving them sufficient time to prepare for the meeting. The following are skeleton outlines from which agenda can be developed. The second outline is given as food for thought, the time schedule is slightly different, placing major tasks in the first hour of your meeting when everyone is fresh.

I	II
Call to order	Call to order
Opening prayer	Opening prayer
Salute to the Flag	Salute to the Flag
Roll Call	Roll Call
Reading of minutes	Reading of Minutes
Treasurer's Report	Treasurer's Report
Correspondence	Correspondence
Reports:	Recommended Action
Pastors	Old Business
Principal	New Business
President	
Standing Committees	Information and Proposals
	Principal's Report
Unfinished Business	Committee Reports
	Pastor's Report
New Business	Questions from the Board
Closing Remarks	Future Business
Prayer	Meeting Date
	Preview of Agenda Topics
Adjournment	Adjournment

2. Staging the meeting: Location, hospitality, advance preparation are all conducive to a well run meeting. It is important to set up early, giving yourself time to have the room arranged, coffee perking, and your thoughts collected before the arrival of others. All members should be able to see each other, an oval arrangement of table and chairs being the most effective. A horseshoe arrangement is more desirable than a rectangle, if an oval can't be managed.
  3. Chairing the meeting – Points to remember:
    - a. Call the meeting to order on time.
    - b. Keep to business at hand by following agenda
    - c. Handle discussion by tactfully directing its flow, giving every member who wants to speak a chance to be heard.
    - d. Keep to a reasonable time schedule.
    - e. Use Gavel: To Call meeting to order – To maintain order – To declare adjournment
- Using form I of the sample agendas:
- a. Call to Order (the meeting will come to order.) always begin on time.

- b. Opening Prayer (Father or Sister, will you please open the meeting with a prayer?)
- c. Salute to the Flag
- d. Roll Call of Board Members
- e. Reading of Minutes (the secretary will read the minutes of the last meeting. Are there any corrections, the minutes stand approved as read, or as corrected, if there are corrections)
- f. Treasurer's report, etc.
- g. After business is completed, (if there is no further business the meeting will be adjourned.) The meeting will need to be adjourned by motion only if business has not been completed.

c. A working knowledge of the Chairmanships of your Executive Board, their duties, and what you must do to facilitate the accomplishment of their duties. A good president will use the people on his or her board as an extension of himself. Learn to delegate authority. A "one man show" is not always effective, stifling initiative and creating boredom. If you do not use your board effectively, their interest dies and their active contribution is lost, to the detriment of your unit. Always maintain contact with your board members, keeping them well informed and up to date on matters affecting your unit. The following is a list of duties for the basic members of your board.

1. Vice Presidents: Each unit usually has traditional duties assigned to its vice presidents. If not, think of areas where they can help you with the special functions of your unit. Keep them well informed of what you are doing, bearing in mind that they may have to act as president in your absence.
2. Recording Secretary: The recording secretary keeps the minutes of the regular and executive board meetings of the unit. She/he also keeps an up to date roll of members of the board, a copy of the constitution and by-laws, including amendments, and a record of all committees. The recommended procedure for handling minutes is to take notes at the meeting, to include:
  - a. Kind of meeting
  - b. Time and place of meeting

- c. Name of presiding officer
- d. Members of board present
- e. Members of board excused
- f. Members of board absent
- g. Approval of previous minutes (with or without corrections)
- h. Record of actual business of meeting (do not record conversations, discussions, you may say, “after discussion, it was decided to\_\_\_\_\_”)
- i. State motions in full, including name of maker of motion, statement of motion, and action of motion.
- j. Don't include motions that were withdrawn
- k. Record all counted votes
- l. Time of adjournment
- m. Signature and title of secretary

As soon as possible after the meeting, a rough copy of the minutes should be made from these notes, while the meeting is fresh in memory. When making the final copy, the secretary should organize his/her notes into clear, concise statements. Each motion should be recorded in a separate paragraph. The minutes should be type written or legibly written with a wide margin for corrections. When this final copy is read for approval, any corrections are made by bracketing incorrect parts and writing corrections in this wide margin. They are then kept in a permanent file. A copy should be sent as soon as possible to the corresponding secretary and to the president.

3. Corresponding Secretary: Shall conduct all correspondence of the unit and read all correspondence received by unit at meetings. It is extremely helpful to members of a board to have a

copy of the minutes and an agenda prior to the meeting date, as preparation for the business at hand. The corresponding secretary should, therefore, receive a copy of the agenda and the minutes well before the meeting date so copies can be made and sent to each member of the board, along with a reminder of the date, time, and place of the meeting.

4. Treasurer:
  - a. Shall keep records of all funds of the association dispersing them only as Directed by the President.
  - b. Sign all the checks of the association together with the President.
  - c. Maintain Financial Books.
  - d. Deposit all monies received at a bank approved by executive board.
  - e. Reads financial statement at all meetings:
    1. Balance on hand as of last meeting.
    2. Receipts
    3. Disbursements
    4. Balance on hand at current reading

If the funds are handled by Pastor:

1. Change: (b) to read “sign all Requisitions, etc.”
  2. Change: (d) to read “deposit monies with the pastor”
5. Legislative Chairperson: Shall make sure that all material sent to the Chairperson from the Alliance of Catholic Schools Families is understood, and is duplicated and distributed to the membership. The chairperson should know the names of government representatives, both state and national, and should be prepared to assist in all letter – writing campaigns. Time, as well as materials, should be provided during a regular P.T.A. meeting.
  6. Other chairpersons your board may have.
    - d. A working knowledge of all special functions of your unit

## B. Communication

1. Serve as a direct line of input and feedback between:
  - a. Unit and principal
  - b. Unit and pastor
  - c. Unit and other units
  - d. Unit and Regent
2. Maintain contact with all committees and board members.
3. Establish a good time that you can be reached by members.
4. Qualities of a good communicator.
  - a. Learn to listen when others are communicating with you. Give them individual attention. This indicates response on your part, establishes rapport. Be sensitive to the feelings of others, never demolishing another's self respect.
  - b. Be knowledgeable in your subject matter.
  - c. Train yourself to recognize potential areas of discord or distress.
  - d. Maintain a positive manner of communication. Nip idle gossip and speculation immediately before it becomes an inflated controversy. The health of your unit depends on your ability to communicate in a positive manner.
  - e. Criticism, how to handle. Evaluate:  
HEALTHY CRITICISM, offered in a positive manner, can be used for growth and action.  
NEGATIVE CRITICISM can only nibble away at strength, is divisive. Control it at the start in a diplomatic way.

## C. Organization and Administration

1. Prepare a calendar or time line for your school year. This should be an explanation of what has to be done each month, with any specific dates kept in mind. Refer to this at all times, maintaining your schedule throughout the year. This helps you to advise others, board members and committee chairpersons, when guidance is needed.
2. Prepare a working notebook or binder with sections for:
  - a. Monthly agendas
  - b. Minutes of meetings
  - c. Sections for each committee, e.g. newsletter material, legislative, etc.

- d. Helpful to have clip in front for items that demand immediate attention.
- 3. Prepare a separate file for each special function of your unit. It should include:
  - a. Calendar or time line when each job has to be started and completed.
  - b. Final reports from each member of the committee.
- 4. Maintain contact with each member of your board and chairpersons of your committee
- 5. Choosing chairpersons for your Executive Board and for the special functions of your unit.
  - a. Know the qualities needed for the position
  - b. Form search committee for positions
  - c. Filling the positions. Give:
    - 1. Honest job description includes attendance at meetings, and time involved.
    - 2. List of your goals and expectations of position.
- 6. Training those around you for leadership, includes being able to spot potential leadership. You should be concerned with the future of your unit. Begin training your replacements right from the beginning.

#### D. Before Installation

- 1. Familiarize yourself with Constitution and By-Laws
- 2. Meetings to schedule:
  - a. You and outgoing president, she/he should acquaint you with all aspects of your position. Work with her files.
  - b. You and Pastor, to discuss his perception of unit, his suggestions and goals for the unit.
  - c. You and Principal, to discuss problem areas, if any, suggestions, goals.
- 3. Begin choosing your committee heads. Refer to #5 under organization.

#### E. After Installation

- 1. Meet with Principal, Executive Board to decide on the coming year's objectives, special events, meeting dates, etc. Decide on goals for the year. Prepare a formulative calendar at this time.
- 2. Obtain the rest of the chairpersons for your P.T.A. functions

3. Prepare a working calendar. This should include the date for the beginning of each project, dates when reports are due, meetings you are responsible for, when to begin preparing for same, etc.

## **SOME TIPS ON COMMUNICATING ABOUT PROBLEMS**

1. Make certain that discussion of the problem is for the good of the association, and not the result of personal feelings.
2. Keep all discussion of problems impersonal. Do not accuse or blame someone for the problem.
3. Tell it to the right person. Make certain you are discussing the problem with the person who is responsible for making the decision to correct it.
4. Time it right. Don't rush anywhere with a problem (except to the fire alarm). Think the situation through, and choose the most appropriate time to discuss the problem.
5. Keep it honest. Tell it like it really is. Don't dramatize or seek sympathy or distort facts.

Remember to request feedback and listen to the other side. Your problem may involve other people and responsibilities, so what you would like may not be in the best interest of all concerned.

## **QUESTIONS TO ASK YOURSELF BEFORE PRESENTING A PROBLEM**

1. Will verbalizing the problem help the association or do I just need to let off some emotional steam?
2. Am I exaggerating the problem? How can it be presented with honesty and all the basic facts?
3. Can I discuss the problem impersonally or will someone else be accused or blamed?
4. Who should hear about the problem? Who can make the decision to correct it?
5. Is there a right time to approach this person about the problem? When?
6. Can I suggest some alternative solutions after I've described the problem? What would these be?