



# BURBANK COUNCIL PTA

LEADERSHIP IN-SERVICE TRAINING (L.I.S.T)

UNIT PRESIDENT WORKSHOP

MAY 2021

# BCPTA EXECUTIVE COMMITTEE 2021-2022

Position	Name	Email	Phone Number
President	Little, Lori	<a href="mailto:president@BurbankCouncilPTA.org">president@BurbankCouncilPTA.org</a>	(818) 421-7767
1st VP Leadership	Harvel, Wendi	<a href="mailto:leadership@BurbankCouncilPTA.org">leadership@BurbankCouncilPTA.org</a>	(818) 468-1144
2nd VP Membership	Walters, Charlene	<a href="mailto:membership@BurbankCouncilPTA.org">membership@BurbankCouncilPTA.org</a>	(310) 598-9058
3rd VP Legislation/Advocacy	Konstantine, Erin	<a href="mailto:legislation@BurbankCouncilPTA.org">legislation@BurbankCouncilPTA.org</a>	(310) 629-4211
Treasurer	Molaro, Chris	<a href="mailto:treasurer@BurbankCouncilPTA.org">treasurer@BurbankCouncilPTA.org</a>	(818) 395-5577
Financial Secretary	Means, Michelle	<a href="mailto:financialsecretary@BurbankCouncilPTA.org">financialsecretary@BurbankCouncilPTA.org</a>	(818) 339-7224
Auditor	Slaughter, Marja	<a href="mailto:auditor@BurbankCouncilPTA.org">auditor@BurbankCouncilPTA.org</a>	(818) 207-3598
Recording Secretary	Duenckel, Kelly	<a href="mailto:secretary@BurbankCouncilPTA.org">secretary@BurbankCouncilPTA.org</a>	(818) 434-7900
Historian	Slek, Mona	<a href="mailto:historian@BurbankCouncilPTA.org">historian@BurbankCouncilPTA.org</a>	(818) 472-8349
Corresponding Secretary	Kamm, Amy	<a href="mailto:correspondingsecretary@BurbankCouncilPTA.org">correspondingsecretary@BurbankCouncilPTA.org</a>	(818) 653-7703
Parliamentarian	Morris, Kirsten	<a href="mailto:parliamentarian@BurbankCouncilPTA.org">parliamentarian@BurbankCouncilPTA.org</a>	(714) 742-5184
Compliance Officer	Crivelli, Judy	<a href="mailto:compliance@BurbankCouncilPTA.org">compliance@BurbankCouncilPTA.org</a>	(818) 512-8857

# OUR FOUNDERS



**ALICE MCLELLAN BIRNEY**

A native of Georgia, this motivated woman had wide interests but deep devotion to her own children. She felt the needs of all children must be recognized as vitally important to everyone. As a mother, Alice Birney realized it was important to know about mental and physical health and the educational needs of her own three children. She desperately wished to impart this to other mothers and to raise the status of motherhood to the important level it deserved.



**PHOEBE APPERSON HEARST**

An energetic, educated, and philanthropic woman, well known in Washington, D.C., and San Francisco, Phoebe Hearst became aware of the sad plight of many of the nation's children first as a young teacher and later as she traveled or worked unselfishly in many communities. With one son of her own, she also was godmother to and supported the education of scores of children.



**SELENA SLOAN BUTLER**

A dedicated community leader and teacher, Selena Butler worked diligently in Atlanta, GA, to unify parents and teachers for the advancement of child welfare and education. She founded not only her school's Parent-Teacher Association, but the Georgia Parent-Teacher Association, and in 1926, the National Congress of Colored Parents and Teachers.

# PTA ORGANIZATIONAL STRUCTURE



NATIONAL PTA



CALIFORNIA STATE PTA



FIRST DISTRICT PTA



BURBANK COUNCIL PTA



BURBANK UNIT PTAs

# OUR MISSION STATEMENT

*The mission of California State PTA is to positively impact the lives of all children and families.*

The organization shall be:

- Noncommercial
- Nonsectarian
- Nonpartisan

# NONCOMMERCIAL

- The name “PTA” — which is a registered service mark — or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, the promotion of their goods and services.
- Before accepting donations of goods or services, a PTA organization, at any level, should consider whether such acceptance might be construed as an endorsement of the provider.

# NONSECTARIAN

- Creed, color, race and economic status are irrelevant to qualification for membership. PTA should be hospitable to all – supporting no one religion over another and according each faith equal respect and consideration.
- As a private association, PTA has the right to offer inspirational messages to open or close its meetings; however, such messages by PTA leaders should be inspirational rather than sectarian, recognizing that in this pluralistic nation, not all members share the same beliefs.
- Poetry, quotations from great men and women, uplifting anecdotes, and moments of quiet meditation can serve to focus concern for and dedication to improving the lives of children and youth.

# NONPARTISAN

- PTA units may be involved in legislative activities by supporting or opposing local issues that affect children or services to children in their respective communities, and unit, council and district PTAs are encouraged to promote adopted California State PTA positions and may be requested to actively support them.
- **PTA must never support or oppose political parties or candidates, including those running for school boards on nonpartisan slates.**
- PTA may adopt a position expressing its support for or opposition to issues dealing with the health, safety, education or general well-being of children and youth, but only to the extent permissible with respect to the requirements of each PTA's tax-exempt status.
- **Nothing in the law or in PTA bylaws prohibits members as individuals from exercising their civic responsibilities in personal and partisan ways, including running for offices themselves.**

# PTA LEADERS ARE ADVOCATES

## WHY ADVOCATE?

- To secure adequate laws for the care and protection of children and youth
- To educate decision-makers at local, state and/or federal levels
- To educate the public
- To influence laws, policies & programs

NO AMOUNT OF FUNDRAISING EQUALS THE IMPACT OF A SINGLE PIECE OF LEGISLATION!

## WHAT DOES LOCAL ADVOCACY LOOK LIKE?

- Involvement in LCAP process
- Speaking at school board meetings
- Offering advocacy training
- Meeting with elected officials on PTA concerns
- Budgeting for and attending CAPTA Legislation Conference
- Keeping up-to-date on Local and State Resolutions affecting Education and Community

## THINGS TO REMEMBER

- PTAs CANNOT support or oppose political parties or candidates, including those running for school boards.
- If you're speaking on behalf of your PTA in public, you must have prior approval of your Executive Board.
- PTAs CAN adopt a position expressing its support for or opposition to issues dealing with the health, safety, education, or general well-being of children and youth only to the extent permissible with respect to the requirements of each PTA's tax-exempt status. This requires a study committee and extra steps; please contact Council PTA for further instruction.

# PTA ASSOCIATION MEETINGS



# EFFECTIVE PTA MEETINGS

## BEFORE MEETING

- Meet with Executive Board no later than 2 weeks ahead of Association Meeting
- Verify meeting location
- Review previous minutes
- Review upcoming (and past calendar)
- Prepare Agenda (Send no later than 10 days ahead of meeting) – send to entire Membership.
- Contact those who should be presenting a report

## DURING MEETING

- Start on time
- Make sure all are welcome
- Agree on ground rules
- Review agenda
- Stick to the agenda
- Use parliamentary procedures
- Summarize
- Give all a chance to participate
- Restate decisions/assignments
- End on time

## AFTER MEETING

- Make sure minutes are distributed promptly
- Follow up on assignments
- Try to reach out to any new parents that came to the meeting; make sure they feel welcome

# EXECUTIVE BOARD MEETINGS

## REMEMBER:

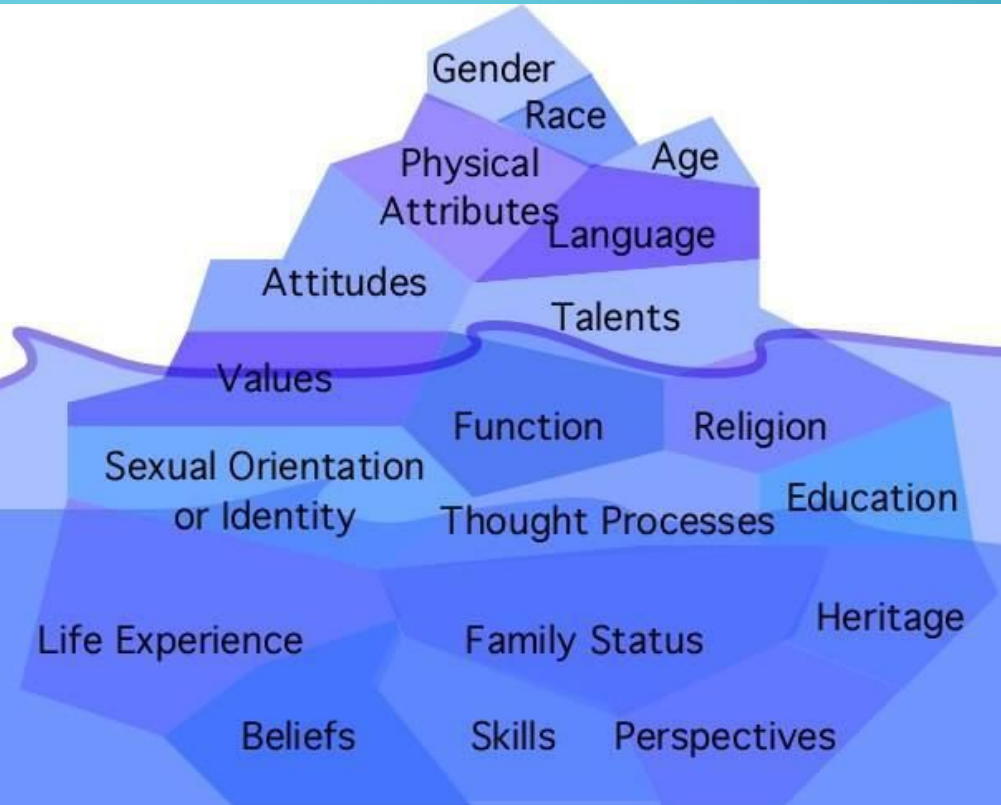
- YOU are not the TEAM
- YOUR JOB is to empower the TEAM and to build future leaders
- YOU need to delegate with authority; not pass off, but DELEGATE
- Make sure all board members feel welcome
- Avoid “clique-ish” behavior
- Have fun and remember – #we’re too tired – We’re here to DO GOOD THINGS FOR KIDS

## REMEMBER TO ESTABLISH AND STICK TO THE GROUND RULES:

- No rank in room
- Respect everyone’s comments
- Nothing goes out of the room (Cone of Silence)
- Speak one at a time; no one speaks over another
- Try not to repeat
- Stay on task
- Don’t take anything personally; remember what the focus is – the Kids!
- Agree to disagree
- Stick to a time frame

# DIVERSITY AND INCLUSION

**Diversity** means all the ways we differ. It includes the readily visible differences and the underlying differences that may be below the surface.



# DOES PTA REFLECT YOUR COMMUNITY?

- Is your school's diversity reflected in its PTA membership?
- Important to assess what groups are not well-represented and start making efforts to engage
- Communicate what PTA does in ways that make them see value for them and their families
- Keep dues affordable
- Try to have fun events to embrace the diversity at your school
- Find active PTA members who have connections with unrepresented groups and ask them to be PTA ambassadors
- Start thinking now about how you want your PTA membership to look like a year from now
- Check out [www.ed-data.org](http://www.ed-data.org) to get the latest demographics for your school.

# REACHING ALL FAMILIES AT YOUR PTA

SOMETIMES THE FOLLOWING  
EVENTS CAN BE EXCLUSIONARY:

Donuts with Dads/Muffins With  
Moms

Daddy/Daughter or Mother/Son  
Dances

CONSIDER CHANGING THEM TO  
THE FOLLOWING:

Donuts with Grownups /  
Muffins in the Morning

Kids' Choice Dance or  
Sweetheart Dance

# MEMBERSHIP



JOIN **PTA**<sup>®</sup> TODAY!

# WITHOUT OUR MEMBERS, THERE IS NO PTA!

Things to remember:

- Members need to be aware of any upcoming PTA meetings or events. Make sure you have a list of the current membership; you will need names and email addresses at a minimum
  - Make sure you are sending monthly emails with meeting agendas and info to all your members – posting to Facebook isn't enough.
- Secondary schools – reach out to the feeder schools' PTAs and see if they can send a note on your behalf welcoming them to join your PTA
  - Don't leave it up to the school to reach your members
  - **MEMBERSHIP + ADVOCACY = SUCCESS!**

# TOTEM – ONLINE MEMBERSHIP

- Fantastic tool for gaining new members
- Creates a QR Code that you can incorporate into all your marketing materials
- Automatically forwards dues to Council, State & National saving your Treasurer time
- Also helps your Financial Secretary in not having to enter these deposits
- Can automatically renew your members! Win-Win!
- Go to <https://jointotem.com/#for-associations> to add leaders, check member lists, etc.

# COMMUNITY MEMBERSHIPS - WHAT ARE THOSE?

- Allows someone to join all 16 units so that they are a member of every PTA in Burbank
- Run through Burbank Council PTA
- When you receive the list of Community Members from Council:
  - Ensure Membership Chair adds them manually to Totem with their email addresses so they have access to their PTA Card (Needed for Convention)
  - Add them to your member distribution list so they will know of all meetings and business of your Association
  - They are members so are allowed to VOTE!

# PARLIAMENTARY PROCEDURES, BYLAWS AND STANDING RULES... OH MY!



Bylaws are designed to help the group function in an orderly manner.

The parliamentarian shall ensure that a copy of the most current and adopted bylaws (with standing rules) for your unit is provided to all officers and board members at the beginning of the term of office. Each member is responsible for making a thorough study of them.

A copy of the bylaws must be made available to any member of the association upon request for review (not to keep).

 **Do not post PTA bylaws on any website!** 

You *MAY* post a redacted version on a password-protected drive for your Board only.

# BYLAWS PROCEDURES – DO EVERY YEAR!



# PARLIAMENTARY PROCEDURES

*Parliamentary law is an orderly set of rules for conducting meetings of organized groups for the purpose of accomplishing their goals fairly.*

- *Robert's Rules of Order, Newly Revised*, is the parliamentary text that governs the PTA where the PTA bylaws do not apply. The California State PTA Bylaws and Bylaws for Local PTA/PTSA Units always take precedence over Robert's Rules of Order.
  - A parliamentarian can assist the president when questions of procedure arise. If a parliamentarian is not appointed and ratified, the president should appoint one (pro tem) for each meeting to assist the president in conducting an orderly meeting.
- Members present motions by stating "I move..." as in "I move to release the funds up to the budgeted amount for Reflections."



# PTAS ARE PUBLIC CHARITIES

Are eligible to receive tax-deductible contributions

Are generally exempt from paying federal and state taxes

**As Public Charities,  
PTAs:**

Must file federal and state returns annually

May not use funds to benefit a private person

Remember – PTAs are noncommercial and may not endorse a commercial entity or engage in activities not relating to the Purposes of PTA. The name “PTA” may not be used in conjunction with commercial activities, including the promotion of commercial goods and services.

# A FINANCIALLY HEALTHY PTA:

- Ensures that checks and transfers between bank accounts are always signed by two authorized check signers.
- Prepares and presents monthly treasurer reports, budget-to-actual comparative reports, financial secretary reports, committee reports and semiannual audit reports at board and association meetings.
- Ensures budget is approved by association and expenditures are authorized prior to spending funds.
- Only pays bills which have been authorized by the executive board or association.
- Has the bank statements reviewed monthly by a non-check signer; may be the auditor.
- Files the appropriate IRS Form 990 annually and any state forms required by due date.
- Ensures that all money is counted by two PTA members, one of whom must be an officer or chair. Cash verification forms are signed by everyone who counts monies. A signed copy of the verification form is given to each person who participates in the count with an additional copy for the chair.
- Ensures officers receive training at convention, state, district, or council PTA workshops.
- NEVER WRITES A CHECK MADE PAYABLE TO CASH!!!

# CASH HANDLING PROCEDURES



Two people need to count the money; cannot be related by blood or live in the same household. Count all monies and deposit in bank or safe immediately after your event, and all money needs to be counted before it leaves the site.



All persons who count money need to sign the cash verification form; copies need to go to whomever signed the forms, and to the Treasurer, Financial Secretary (if you have one), and the event chair.



All monies need to be deposited immediately; cannot be left in the trunk of someone's car and can never be left unattended.



If your unit counts money after the bank has closed and your site has a safe, you can put the funds in the safe until the next day when banks are open. Make sure you seal the funds in a tamper proof envelope if possible.

# FILING YOUR TAXES



# FILING TAXES! YOU CAN DO IT! WE CAN HELP!

## WHAT IS NEEDED?

- IRS Form 990, 990EZ, or 990N
- California Franchise Tax Board Form 199 or 199N
- California Attorney General's Office of Charitable Trust Registration Renewal form RRF-1 and CT-TR-1 (if gross receipts are less than \$50,000 AND you filed a 990N).

These must be filed by the tax deadline, which for Burbank is **October 15<sup>th</sup>**.

**It is the responsibility of the entire Executive Board to review and make sure the taxes are filed.**

# TAX SEASON – SIX EASY STEPS!

STEP 1: ANNUAL FINANCIAL  
REPORT (AFTER EXEC BOARD  
APPROVES AUDIT)

STEP 4: CHARITABLE TRUSTS  
WITH THE ATTORNEY GENERAL  
(RRF-1 & CT-TR-1)

STEP 2: FEDERAL TAXES WITH  
THE IRS (990, 990N, 990EZ)

STEP 5: RAFFLE REPORT (IF  
APPLICABLE), FILED WITH  
ATTORNEY GENERAL'S OFFICE

STEP 3: STATE TAXES WITH  
THE FRANCHISE TAX BOARD  
(199 OR 199N)

STEP 6: TREASURER  
UPLOADS ALL  
DOCUMENTS TO COUNCIL  
GOOGLE DRIVE

# PTAS AND SOCIAL MEDIA

the world before social media...

LinkedIn Pinterest YouTube

foursquare

Instagram

Imgur

reddit

WordPress

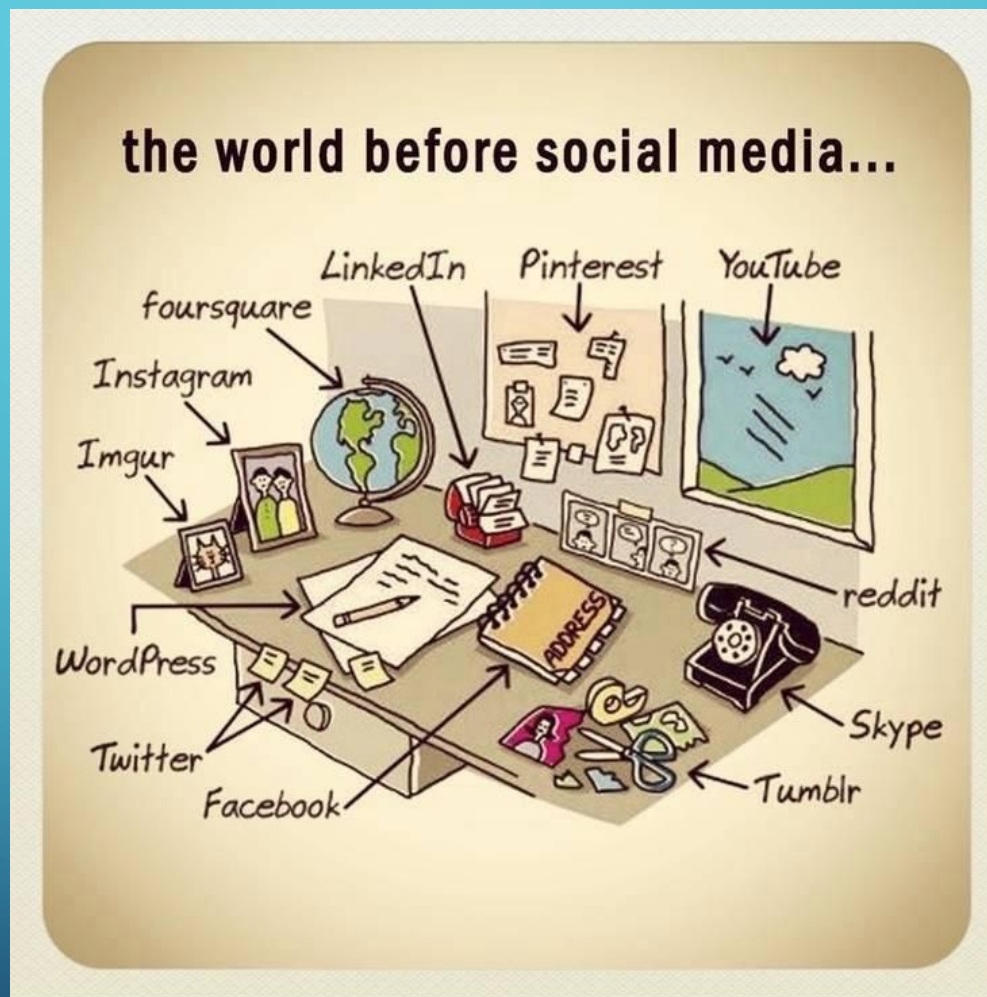
Twitter

Facebook

Skype

Tumblr

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# GENERAL EMAIL TIPS

- ❖ Be informal, not sloppy.
- ❖ Keep messages brief and to the point.
- ❖ Use sentence case.
- ❖ Use a signature that includes contact information.
- ❖ Use the subject field to indicate content and purpose.
- ❖ Change the subject line when the e-mail topic changes.
- ❖ Use BCC and CC appropriately.
- ❖ Be sparing with group e-mail.
- ❖ Don't use e-mail as an excuse to avoid personal contact.
- ❖ Remember that e-mail isn't private – anything can be forwarded.
- ❖ Remember that your tone can't be heard in e-mail – make sure to read it to yourself before sending.
- ❖ Summarize long discussions
- ❖ Have a plan in place to deal with potential phishing scams.

# E-MAIL ETIQUETTE AND TIPS

## USE THE 5 D'S:

- ❖ Dedicate time for email every day – try to respond within 24 hours but no more than 72 hours.
- ❖ Do the action requested in the message.
- ❖ Delete it.
- ❖ Defer it until later.
- ❖ Delegate it to someone else.

# WHEN ADMINISTERING PTA SOCIAL MEDIA SITES:

- ❖ Have at least two Admins such as: President & Communications Chair (or the like) for your social media accounts.
- ❖ Although the president is responsible for approving material, a PTA can have a communications plan with preapproved content and general guidelines.
- ❖ The president may appoint a social media person/people to post on PTA sites.
- ❖ Some sites (e.g., Facebook) allow contributors or multiple admins, so adding specialized contributors can allow greater flexibility and faster response. (e.g., Reflections chair, Vice President for programs, fundraising chair)
- ❖ PTAs should set guidelines ahead of time about what each contributor can and cannot post.
- ❖ Be sure all logins and passwords are kept in a safe place and passed on to the next term's officers.
- ❖ Suggest sites be registered to generic emails for the officers so accounts can be passed along without interruption, like [president@yourunit.com](mailto:president@yourunit.com) or [abcPTApresident@gmail.com](mailto:abcPTApresident@gmail.com)

# CONTENT ON PTA SOCIAL MEDIA:

- ❖ Posts should be PTA related and approved by the president.
- ❖ Highlighting special events, programs, grants, PTA and school deadlines, allied agency information and other information of interest to PTA members is a good use of social media.
- ❖ Content from vetted sources or excerpts from previously PTA approved flyers, emails or website content (Refer to the Social Media and Advocacy Guide).
- ❖ Content from your school or Burbank Unified School District.
- ❖ We cannot post about fundraising efforts from our Allied Agencies on our PTA pages; we can spread information about the agencies themselves, and what they do for the community, just not about their fundraising efforts.

# SOCIAL MEDIA GUIDELINES

## OTHERS POSTING ON PTA SOCIAL MEDIA

- PTA Social Media sites (including websites) that are administered and owned by the PTA and not the school, do not need the principal's approval for posts. A good working relationship between the PTA and the school site administrator is best, so when possible, coordinate. Remember, any PTA material that is passed out on school property or the school website still needs to be approved by both the president & principal.
- Each local PTA can decide if it wants to allow comments on sites or if it prefers a push only site. The advantage to having a more interactive site is that it allows you to know how your community feels; the disadvantage is that it allows comments which will need to be monitored. **If you do allow public comments or postings, someone will need to monitor the site and decide what is appropriate. Inappropriate or off topic comments should be deleted.** The PTA can decide to delete any comment or post it chooses.
- Setting guidelines and posting them on your sites can help if you feel it is necessary to delete a comment and are asked why. Your PTA social media sites are controlled by your local association and you are not required to post or keep any items.
- Remember, if you have a closed group or private account, this does not mean that it cannot be shared outside your group.
- If you are posting student pictures, you **MUST** have a signed photo release.

# PLANNING EVENTS



# SIGNING CONTRACTS WITH VENDORS

Contracts with a vendor are always signed by two board members: the president and another elected officer. Before signing a contract on behalf of your PTA:

- All contracts must be reviewed and approved by Executive Board before being presented to the Association.
- Get your association's approval and make sure that it is recorded in meeting minutes.
- Verify that vendors are fully covered by their own liability insurance and Workers' Compensation and obtain a copy of their certificate of insurance.
- Have vendors sign a Hold Harmless Agreement.

# SIGNING CONTRACTS WITH VENDORS, CONT.

- With any contract, the president is responsible for the agreement and should clearly identify that it is the PTA entering into the contract and not the president as an individual. The signature on a written contract should read,

**“ ABC PTA by Jane Smith, President and (name), officer.”**

- In addition, as a PTA officer, **NEVER** sign a Hold Harmless Agreement on behalf of your PTA. Signing such a contract naming the PTA responsible for all injury and damages may increase PTA's liability and the amount PTA might have to pay if a claim occurs.
- If you have questions about a contract, contact the PTA insurance broker to review it prior to signing.

# SPONSORSHIP VS. ENDORSEMENT

## PTAS CAN:

- Hang a banner at an event (with Use of Facilities Form and checking with School Principal/District policy).
- Place an acknowledgement in an event program book.
- Announce event sponsors to the audience.
- Acknowledge sponsorship of a particular event in the PTA newsletter or school newsletter, if BUSD policy permits.

## PTAS CANNOT:

- Have any arrangement or expectation that the business will receive any substantial return benefit for its payment.
- Enter into a partnership with a business.
- **Endorse or promote the sponsor, its product or services.**

For any publication containing advertising, use the following disclaimer:

*The mention of any business or service in this publication does not imply an endorsement by the PTA.*

# MENTORS – WE ARE HERE TO HELP YOU!



# 2021—2022 Burbank Council PTA Mentors

School	Mentor	Mentor Cell #
Bret Harte Elementary PTA	Chris Molaro	(818) 395-5577
George Washington Elementary PTA	Lori Little	(818) 421-7767
Joaquin Miller Elementary PTA	Wendi Harvel	(818) 468-1144
Providencia Elementary PTA	Chris Molaro	(818) 395-5577
Ralph Waldo Emerson Elementary PTA	Erin Konstantine	(310) 629-4211
Robert Louis Stevenson Elementary PTA	Amy Kamm	(818) 653-7703
Theodore Roosevelt Elementary PTA	Erin Konstantine	(310) 629-4211
Thomas A. Edison Elementary PTA	Kelly Duenckel	(818) 434-7900
Thomas Jefferson Elementary PTA	Kirsten Morris	(714) 742-5184
Walt Disney Elementary PTA	Charlene Walters	(310) 598-9058
William McKinley Elementary PTA	Amy Kamm	(818) 653-7703
Dolores Huerta Middle School PTSA	Charlene Walters	(310) 598-9058
Luther Burbank Middle PTSA	Wendi Harvel	(818) 468-1144
John Muir Middle School PTSA	Kelly Duenckel	(818) 434-7900
Burbank High PTSA	Mona Slek	(818) 472-8349
John Burroughs High School PTSA	Michelle Means	(818) 339-7224

QUESTIONS? ANSWERS? COMMENTS?

