

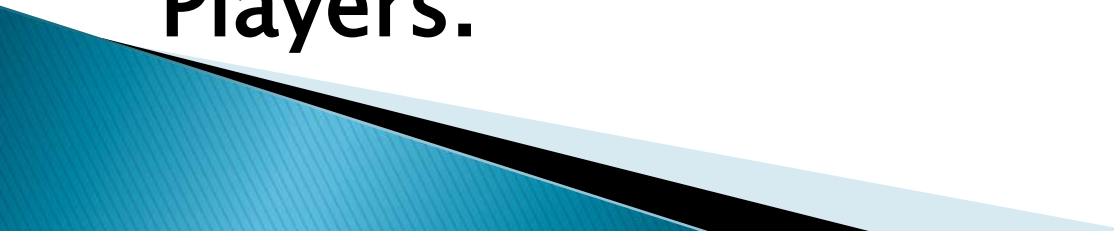
What Not To Do
You Reap What you Sow



Tonight's Goals

- ▶ **Have fun.**
- ▶ **Learn what being a board member is all about:**
 - **Stay out of trouble.**
 - **Get things done.**
 - **Understand NJ PTA requests**
- ▶ **We're all in this together—National PTA, NJ PTA, Your PTA--helping the children, families and schools of New Jersey and beyond.**

Rules

- ▶ **Have fun. Learn a lot**
 - ▶ **The Emcee's rulings are final.**
 - ▶ **No heckling the Emcee.**
 - ▶ **Points awarded for correct answers.**
 - ▶ **Team with most points at the end of the game wins. Yes, there are prizes.**
 - ▶ **Special Points given to enthusiastic and cooperative teams.**
 - ▶ **No heckling the Field Service Team Players.**
- 

One final rule

- ▶ **No moaning about the prizes. This is PTA, not Jeopardy. Where do you think the prize budget comes from anyway?**



True or False

- ▶ The mission of a for-profit is to make money for shareholders. *The mission of a non-profit is to serve people.*



True or False

- ▶ PTAs cannot make a profit during the year and must spend all funds at the end of each school year.



True or False

- ▶ PTAs may carry over an unlimited amount from year-to-year.



True or False

- ▶ Unlike for-profit boards, PTA boards are made up of volunteers. Therefore, PTA boards do not have the same legal and ethical responsibilities of for-profit boards. Volunteer boards are held to a different standard.



True or False

- ▶ As a board member, you hold a trust. That means you have legal and moral obligations to ensure your PTA operates in the best interest of those you serve.



Which of the following is NOT something a new board member needs to know to fulfill the trust?

- 1) a little bit about other board members so to work better together as a team.
- 2) where to go for answers when questions arise.
- 3) the specific responsibilities of his/her job on the board.
- 4) where the coffee pot is stored.
- 5) what a board member is legally and ethically supposed to do.



What is bad advice for a board member:

- 1) Talk a lot, listen a little.
- 2) Publicly criticize board decisions you don't agree with to hold the board accountable.
- 3) Make sure others on the board know you always have all the answers and are willing to share.
- 4) Refuse to change your mind. Stick to your guns. It's the only way to get things done.
- 5) Don't worry about meeting attendance. You can keep up through the minutes.

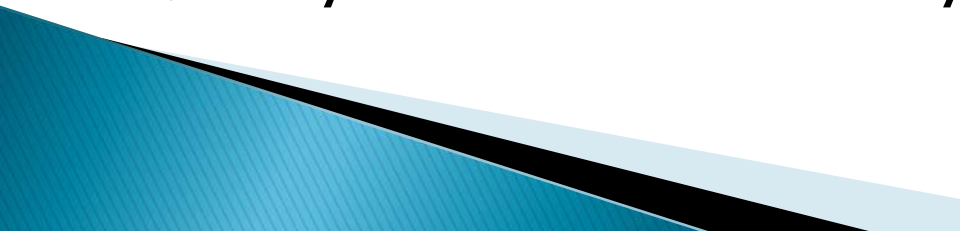


True or False

- ▶ If you are absent from a board meeting, you do not have to support decisions made at that meeting. After all, you were not there.



You know your unit has a problem if....

- 1) Bylaws were last updated more than 3 years ago.
 - 2) Bylaws say your dues are \$2.00 but you raised dues to \$3.00 three years ago.
 - 3) Bylaws say you meet the third Wednesday of each month, but your PTA has been meeting on the second Tuesday for the past year.
 - 4) No one except the President has a copy of the bylaws.
 - 5) “Bylaws? We have bylaws?”
- 



Bonus Points

- ▶ How often does your unit need to submit bylaws to NJ PTA for review?
- ▶ Why do you think they ask you do that?



True or False

- ▶ The only way board members can exercise authority is as a group—making decisions together as a board. There is no “I” in board.

The Field Service Players

starring in

You Did What?





True or False

- ▶ The arts Chair was wrong to sign the contract.
- ▶ Why?
- ▶ The President was wrong to sign the contract.
- ▶ Why?



The Board's responsibility does not include...

- 1) Short- and long-term planning and goal-setting.
- 2) Advocating for the needs of the PTA and its members.
- 3) Ensuring board members like each other and agree on issues.
- 4) Providing resources and ensuring expertise.
- 5) Recruiting and renewing leaders and members.



True or False

- ▶ It is healthy to move people on and off the board, and it is healthy to change officers on a regular basis.



True or False

- ▶ Rotation of officers is not automatic through the ranks unless the bylaws specifically say so.
- ▶ Jim Collins: “Get the right people on the bus at the right time in the right seats.”



How is the President given power within PTA?

- 1) From the members through bylaws.
- 2) From the board through policy and practice.
- 3) Neither 1 nor 2. President is in charge because he or she heads the association.
- 4) From the principal, through school board policy.
- 5) Both 1 & 2



Bylaws say the President is an “ex officio” member of a committee.

That means....

- 1) President runs the committee meetings.
- 2) President has same rights as committee members but does not have to attend.
- 3) Committee cannot meet unless the president attends the meeting.
- 4) President counts toward committee quorum.



The President is never “ex officio”
to which committee?

- 1) Ways and Means
- 2) Hospitality
- 3) Finance
- 4) Nominating
- 5) Membership

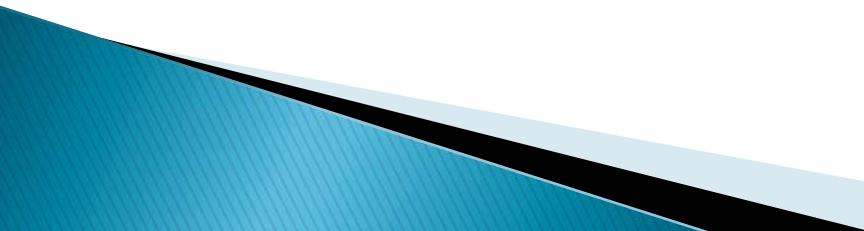


How are committees given power within PTA?

- 1) From the members through bylaws.
- 2) From the President through bylaws or policy.
- 3) From the board through bylaws or policy.
- 4) 1 & 2
- 5) 2 & 3



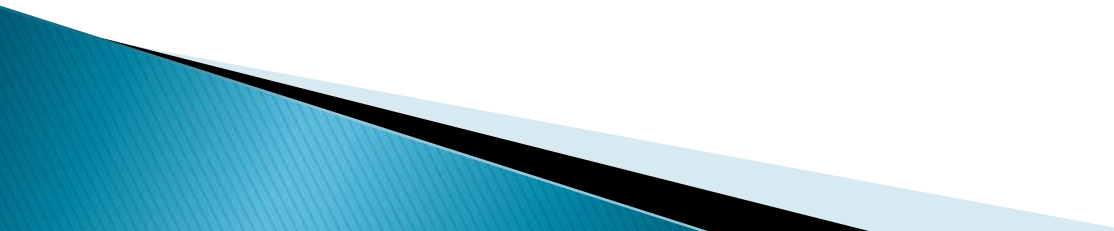
A board cannot delegate what power to a committee?

- 1) Make a recommendation after researching alternatives.
 - 2) Spend money within a board-approved budget and within board-approved guidelines.
 - 3) Hold its own meeting to make decisions.
 - 4) Open a bank account and control a committee checkbook.
 - 5) Develop a draft plan of action for board consideration.
- 

True or False

- ▶ The board cannot be held responsible for the actions of a committee or of an individual committee member.

How is the principal given power in PTA?

- ▶ By the superintendent because he/she operates the school.
 - ▶ By the district through school board process.
 - ▶ By NJ PTA because principals are necessary to smooth-running PTAs.
 - ▶ By the State through parent involvement regulations.
 - ▶ None of the above.
- 



What is a principal's right?

1. Control and/or possession of the PTA checkbook.
2. Final approval of the PTA plan of work.
3. Cancellation of a meeting because he/she cannot attend.
4. Choosing the next president.
5. None of the above.



True or False

- ▶ Individual board members have no individual responsibilities. Only the board, as a team, can be held accountable.



True or False


- ▶ Each board member has fiduciary responsibilities to PTA members and to the association.

Bonus

- ▶ Define “fiduciary”



What are the fiduciary responsibilities of a board

- 1) Care, Loyalty, and Obedience.
 - 2) Protect and Serve.
 - 3) Pro Omnibus, Omnes Pro Uno.
 - 4) Love, Honor, and Obey.
 - 5) Fairness, Respect, and Honesty.
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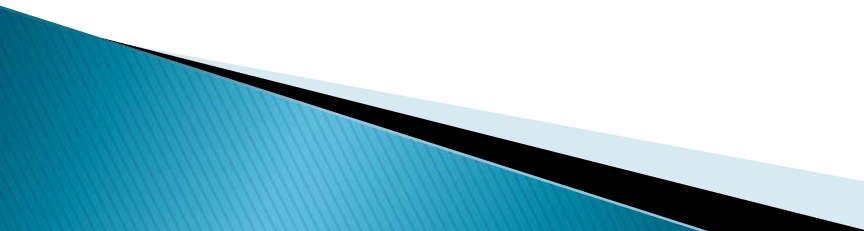


The Duty of Care means a board member must:

1. Keep board business and decision-making details confidential, even from friends and family.
2. Protect the name and reputation of the PTA from harm.
3. Make informed decisions and provide oversight.
4. Provide oversight of the organization.
5. Act in good faith.



Duty of Care: What isn't good advice for a board member?

- 1) You need to vent somewhere if you are going to keep your sanity. It's OK to criticize board decisions to friends and family.
 - 2) Tell friends if PTA President seems incompetent so they can avoid volunteering.
 - 3) If you don't understand a motion, vote with the majority. It's easier that way.
 - 4) All of the above.
 - 5) All of the above except # 1.
- 

Bonus

▶ Duty of Care Horror
Story



What is part of the Duty of Loyalty?

- 1) Put the PTA's needs first when making decisions. Ask "is this in the best interest of my PTA?"
- 2) Do what is best for the association, even if it's not best for you or your friends.
- 3) Avoid personal gain for self, family, friends.
- 4) Support a decision with which you do not agree.
- 5) 1, 2, and 3 only.

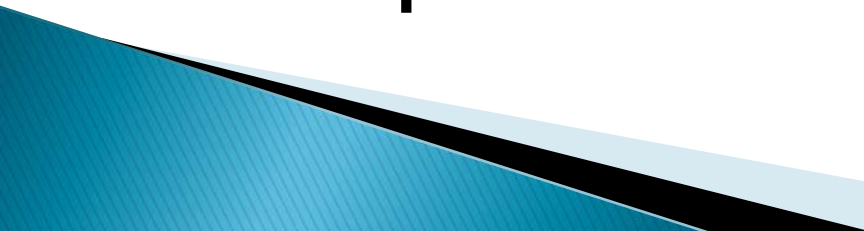
The Field Service Players

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Show Me the Money



Bonus

- ▶ Is this board doing its fiduciary responsibilities?
 - ▶ Why not?
 - ▶ Assuming Lisa isn't embezzling PTA dollars, what can she or the PTA do to fix the problem?
- 



What is not part of the Duty of Obedience:

- 1) Do everything the president says to do, no questions asked.
- 2) Ensure your PTA runs according to its bylaws and with state and federal law.
- 3) Ensure your PTA is in compliance with New Jersey and National PTA bylaws.
- 4) All of the above.
- 5) 3 only.

Bonus

- ▶ Duty of Obedience Horror Story



True or False

- ▶ Board members are responsible for ensuring their specific PTA jobs get done even if they are only volunteers.



True or False

- ▶ PTA dollars must be spent to further the mission, objectives, and goals of PTA.



True or False

- ▶ PTA dollars are for children and families. It is inappropriate to spend PTA dollars on board members for such things as leadership development and networking.



True or False

- ▶ Federal law protects volunteer board members who act in good faith.



Bonus Points

- ▶ What are the exceptions—the limitations of the legal protection?



True or False

- ▶ While Federal Law protects volunteers, it does not protect the PTA as a whole. The association can still be sued.



True or False

- ▶ A board member must support a board's decision, even if the board member wasn't at the meeting when the decision was made.



True or False

- ▶ A board member is responsible to attend all board meetings.



True or False

- ▶ If asking a question is going to hurt someone's feelings, it's better for a board member not to ask rather than risk being seen as critical.



True or False

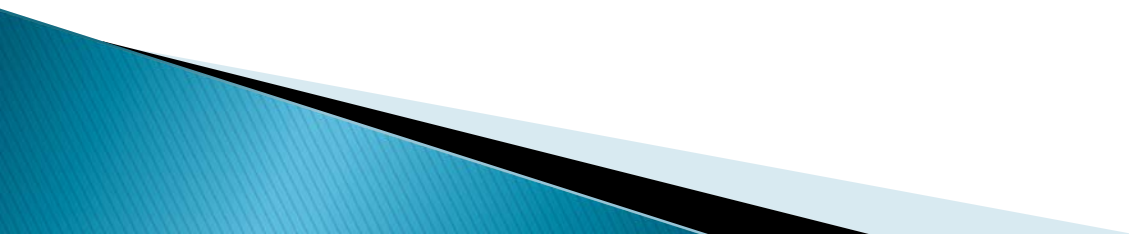
- ▶ A board member has the right to use a personal Facebook page to criticize another board member or a PTA decision.

Fill in the Blank



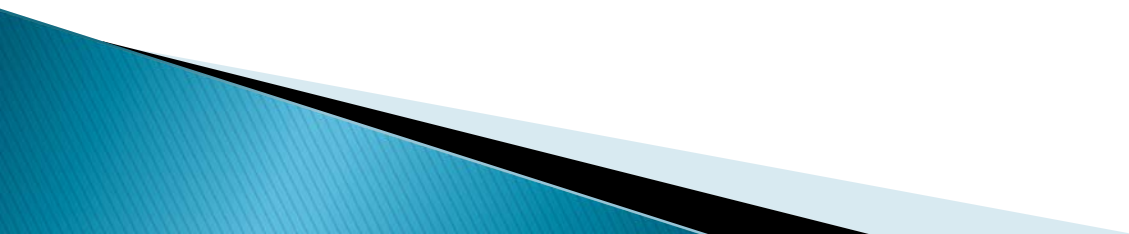


- ▶ The IRS recognizes your PTA as a _____ organization. This status flows through New Jersey PTA's relationship with the IRS.





- ▶ A board member holds a _____ . Board members can also be called _____ees of their association.

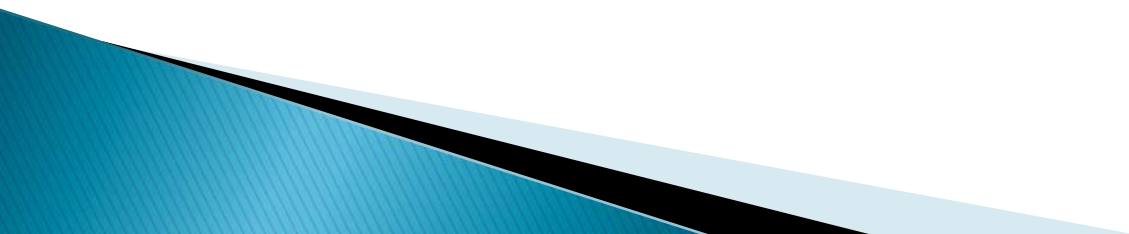




- ▶ When it comes to PTA decision-making, board members owe loyalty to _____ first, friends and family second.

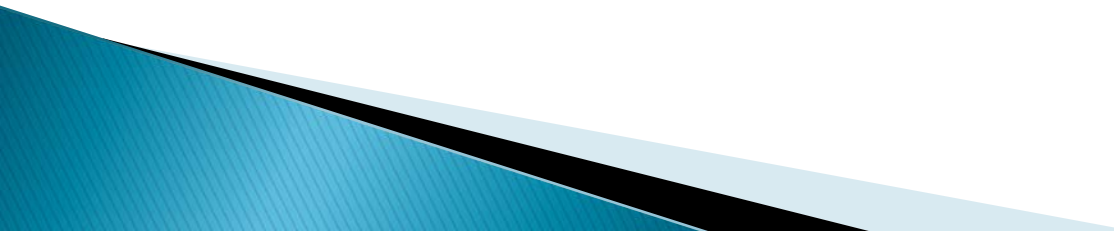


- ▶ The Duty of _____ demands that a board member must always protect the good name and reputation of their PTA.





- ▶ The Duty of _____ demands that PTA board members know and follow the rules that apply to their PTA.





- ▶ The _____ Person Rule is one way to judge decision-making. Ask yourself what would a _____ Person do in this situation?





- ▶ The board exercises authority as a _____, not as individual members.

