



Lake Washington Council

PTSA[®]

everychild. one voice.[®]

SEG LOCAL CHAIR TRAINING

YUMNA GREEN

Council President

March 28, 2023

- ▶ BOD – Board of Directors
- ▶ CPOA – Committee Plan of Action
- ▶ DEI – Diversity, Equity & Inclusion
- ▶ FACE – Family and Community Engagement
- ▶ Local or Locals – Local Unit PTA
- ▶ LWPTSA – Lake Washington PTSA [Council]
- ▶ LWSD – Lake Washington School District
- ▶ LWSF – Lake Washington Schools Foundation
- ▶ MM – Membership Meeting
- ▶ MP – Memberplanet
- ▶ PTA – Parent, Teacher Association
- ▶ PTA vs PTSA – No difference, one just includes “Students” explicitly
- ▶ SOA – Standards of Affiliation
- ▶ SEG – Special Education Group
- ▶ SR – Standing Rules
- ▶ VP – Vice President

ACRONYMS

YOUR PTA NETWORK



National PTA

Washington State PTA

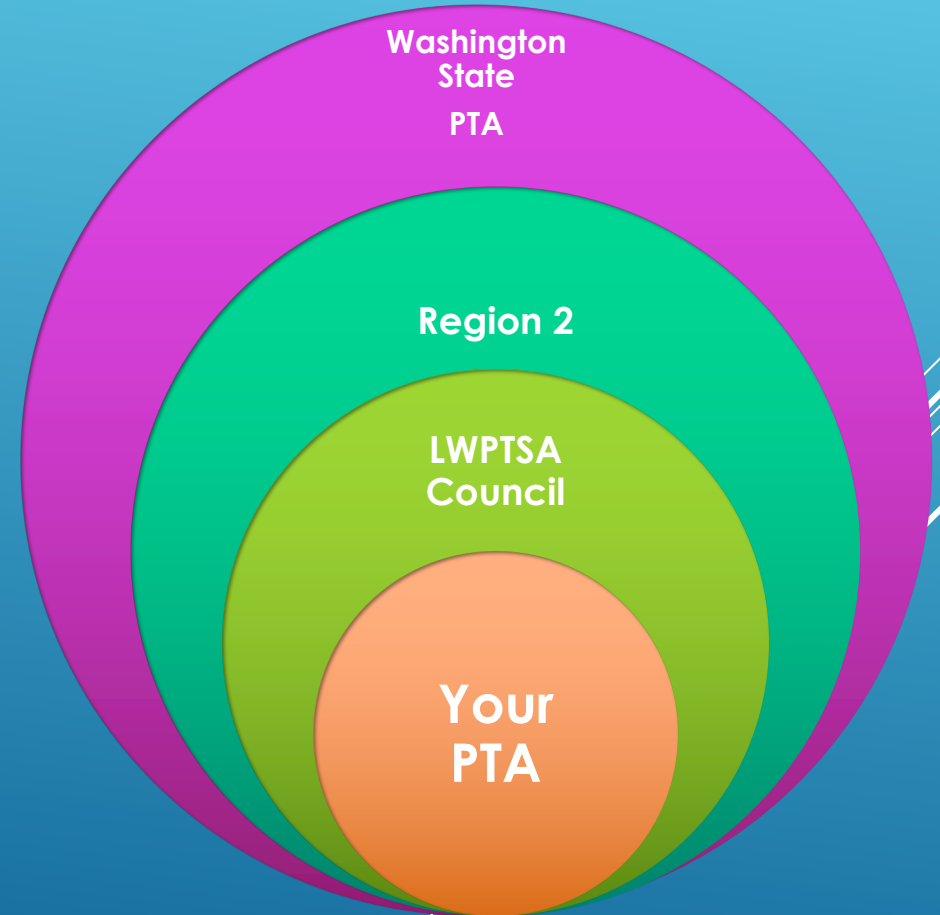
Region 2

Lake Washington PTSA Council

Local PTA – 44 PTAs in our Council

YOUR PTA NETWORK

- Your PTSA has members connected to your community – families and staff at your school, as well as community supporters outside of your school
- LWPTSA Council includes all PTA members across the district
- WSPTA Region 2 includes all PTA members from Bellevue, Issaquah, Lake Washington, Mercer Island, Riverview and Snoqualmie Valley
- WSPTA includes members of 830+ PTAs across our state
- National PTA is the overall umbrella





- PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- Our mission is for PTA to be:
 - A powerful voice for children,
 - A relevant resource for families, schools and communities, &
 - A strong advocate for the well-being and education of all children.
- To serve as a relevant resource to the local PTAs, families and community members within the Lake Washington School District through training, support and guidance, and to advocate for the health, well-being and education of every child.

LOCAL PTA STRUCTURE – OFFICERS & CHAIRS

PTA President

FACE VP

- Meeting Hospitality Chair
- Special Education Chair

Treasurer

Secretary



LOCAL PTA STRUCTURE – OFFICERS

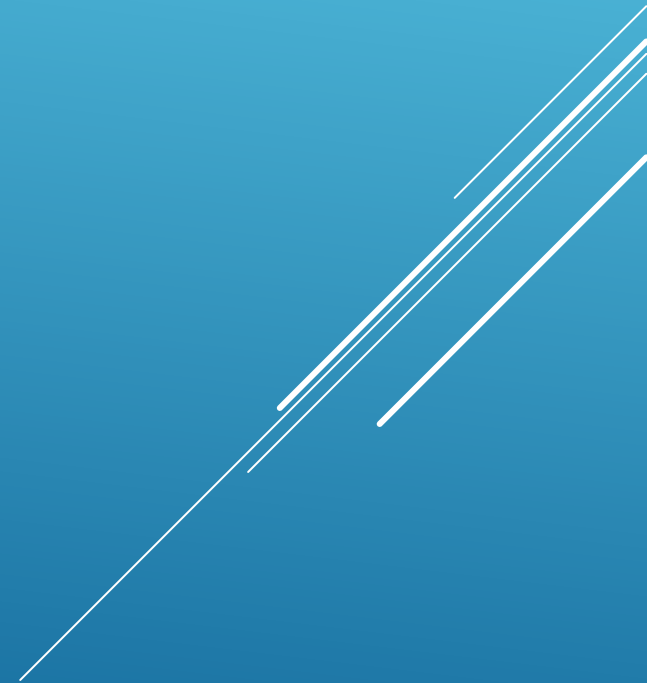
PTA President

FACE VP

- VP Duties include DEI and Special Education support

Treasurer

Secretary



- ▶ A chair's responsibility is to the board of directors – every chair is appointed by the board and serves at the direction of the board.
- ▶ Chair appointments are for one year. No one can promise the chair position to another.
- ▶ Chairs are typically supported by a board members, for example the SEG chair could be supported by the FACE VP, the DEI VP, the Support Services VP, etc.
- ▶ All legal documents and contracts must be signed by two *elected LWPTSA Board members*. Building use must be arranged by an elected Board member. **Chairs are not able to sign legal documents or contracts for PTA business.**
- ▶ **Committee Chairs are not able to initiate or enter into partnerships or partnership agreements with outside organizations.** Chairs must bring any suggestions for partnerships to the Board of Directors for advance discussion and possible approval.
- ▶ If your committee is comprised of volunteers, it is appropriate for the chair to recruit volunteers to help do the work.
- ▶ Communicate with your VP regularly. Depending on your PTA's standing rules, your supporting VP could be required to attend at your committee meetings.

CHAIR RESPONSIBILITIES

- ▶ Sign your local PTA's Code of Conduct Form
- ▶ Know the budget for your program/event
- ▶ Complete and submit the CPoA and Budget Worksheet for board approval, ideally by September board meeting
 - ▶ A chair is not authorized to spend any money or plan any work without board approval
- ▶ Complete and submit the program evaluation at the end of the year
- ▶ Chair your committee meetings and invite your VP to attend
- ▶ Attend required training
- ▶ Submit your monthly board reports – this keeps the board informed
- ▶ For chairs that are board members, let secretary and president know if you are unable to attend any scheduled board and membership meetings
- ▶ Utilize your PTA email and PTA communications platforms for PTA business
- ▶ Advertise and run your program. Share information with your community.
- ▶ Submit reimbursement requests promptly

MORE CHAIR RESPONSIBILITIES

BOARD REPORTS

... a list of your SEG chair responsibilities and actions since the last board meeting

To Include:

- ▶ Tasks Completed
- ▶ Meetings
- ▶ *Progress report on your board-approved plans
- ▶ *Volunteer Needs, if any
- ▶ Celebrations
- ▶ Concerns/Issues
 - ▶ For concerns it is encouraged to not name individual names in your board reports – just a short description of the problem/concern. You can always discuss specifics at the board meeting or with your VP, if you do not attend the board meetings.

- ▶ It is important to know when BOD meetings take place – and when board reports for those meetings are due.
- ▶ It is also helpful to know when membership meetings take place. Check your PTA's calendar or ask your VP.
- ▶ If applicable, make sure that meeting dates and spaces for your committee meetings were requested from your school at the beginning of the year, for any meetings that take place on school property. Typically, the PTA president completes and signs building request forms along with another elected board member.
 - ▶ Meetings that are scheduled on school property cannot be changed by chairs – speak to your VP and PTA President to ask if they can reschedule it for you.
 - ▶ If you need to add an additional meeting date/time/event or change the format of a meeting, speak to your VP and PTA President, so they can help schedule it for you.
 - ▶ Meeting spaces can be hard to come by so be prepared to be flexible if not all requests can be honored by your school.

Much of this is in order to continue to maintain a good working relationship with the school admin and the office staff.

MEETING SCHEDULES

- ▶ **What communications platforms does your PTA use and what are the rules around the administration and use of those platforms?**
 - ▶ PTA or school Newsletters
 - ▶ Social Media platforms like FaceBook, Instagram, Twitter, etc.
 - ▶ PTA Website
 - ▶ Peachjar
 - ▶ “Kidmail”
- ▶ **When is content due and to whom?**
 - ▶ Do you send information to the Communications chair or to your VP?
 - ▶ How often does the newsletter go out? How often is the website updated? Who reviews content before it is published?
- ▶ **Are there discussion groups or networking platforms available?**
 - ▶ FaceBook groups
 - ▶ Mailing lists
 - ▶ BAND
- ▶ **Council’s Special Education Group is a great resource to local chairs**
 - ▶ Council chairs are Kaity Mason and Huma Zarif: specialeducation@lwptsa.net
 - ▶ SEG Facebook Group: <https://www.facebook.com/groups/1619536081750685>
 - ▶ Monthly SEG Meetings: See <https://www.lwptsa.net/special-needs-group/>
 - ▶ Council communications via SEG, Weekly Waves and Currents newsletters

**WHAT IF YOUR PTA
DOESN'T HAVE A
SPECIAL EDUCATION
CHAIR ROLE?**

PTA's *MUST* have a President, a Treasurer and a Secretary. All other positions are discretionary and are outlined in the PTA's SR.

Standing Rules can be amended by the membership.

Approach your PTA leaders and ask if they are interested in adding a Special Education chair role. *Hint: It helps if you volunteer to be a (co)chair. Be willing to start small.

Share Information

Community/Parent Education Events

Provide networking opportunities for Special Education families

Help the board to reimagine events that are inclusive of your Special Education families

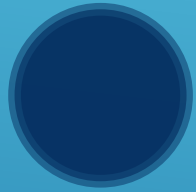
Advocacy efforts in support of Special Education – note this is not advocating for or advising a specific family.



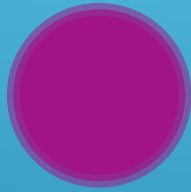
CAN WE FORM A SPECIAL EDUCATION PTA?

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YES, AND THERE ARE LEGAL REQUIREMENTS



Steering
Committee



Articles of
Incorporation
Filing



Charitable
Organization
Application



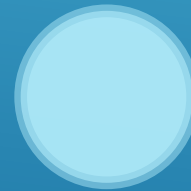
Tax-exempt
Status Filing



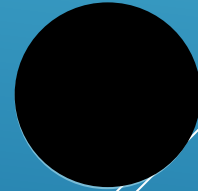
Insurance



Minimum 25
members and 3
Officers



Putting together
Standing Rules &
Budget



Training
Requirements

WSPTA Standards of Affiliation Agreement for Local PTAs 2022 – 2023

In addition to the items listed below, local PTAs shall uphold the ethics, policies, and principles of PTA and shall not take positions in conflict with adopted WSPTA or National PTA positions, resolutions, or issues, or the values, mission, vision, and purposes of PTA.

For assistance with this checklist or help understanding any of the requirements, please contact council leaders (if applicable) or a region director. Additional resources, including review processes, are on the WSPTA website (www.wastatepta.org/pta-leaders/governance/).

Required By	#	Requirement	Fiscal Year	Best Practice/Specifics (WSPTA fiscal year is July 1 – June 30)	Responsible PTA Leader	Date(s) Completed
State of Washington	1.	Officers elected	Current	Officers were elected at a membership meeting (recommended before previous fiscal year-end). State law requires president, treasurer, and secretary.		
	2.	Corporate Annual Report filed	Current	Filed by annual corporate renewal date (end of the month your PTA incorporated).		
	3.	Charitable Organization Registration renewed	Prior	OPTION 1: More than \$50,000 in gross receipts - required to file by May 31. OPTION 2: Not required to file - will file/update the optional filing. OPTION 3: Not required to file - choose not to do the optional filing. *Once an account is created with the Secretary of State, it must be maintained yearly.		
IRS	4.	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than November 15 (or file the necessary extension and file by the deadline).		
Insurance	5.	Year-end financial review	Prior	Year-end financial review was conducted (recommended by August 31).		
WSPTA	6.	Officer names/contact info	Current	Entered names and contact information for all elected officers (and key non-elected positions such as membership, advocacy/legislative, Reflections, programs, and family & community engagement) in the membership database (recommended before previous fiscal year-end, update as needed.)		
	7.	Budget approved	Current	Budget was approved by the membership (recommended before previous fiscal year- end).		
	8.	Standing rules approved	Current	Standing rules were updated as needed and approved by the membership (recommended at first membership meeting of the current fiscal year).		
	9.	Nominating committee elected	Current	Three members were elected to a nominating committee at least 30 days prior to the election of officers. (Recommended at the first membership meeting of the current fiscal year.)		
	10.	Insurance	Current	Purchased appropriate insurance (prior to November 30 to prevent lapse in coverage).		
	11.	Annual training	Current	Annually, at least one elected officer attends PTA and the Law, and all other elected officers attend at least one WSPTA-approved training before the year's WSPTA convention. Maintain documentation showing each elected officer satisfied the annual training requirement.		
	12.	25-member minimum	Current & Prior	Had at least 25 members (or approved membership waiver) the prior fiscal year. Enroll at least 25 members for the current fiscal year no later than October 31.		
	13.	Membership dues paid	Current & Prior	Membership dues paid in full for the previous fiscal year. Current fiscal year membership dues shall be paid upon receipt. Enter current fiscal year members within 30 days.		



QUESTIONS