

- Recognizes and respects differences of perspective and style among the individual board members;
- Acts with dignity and understands the implications of demeanor and behavior;
- Honors the confidentiality of board discussions;
- Is open to new ideas and suggestions;
- Is familiar with the bylaws in respect to the individual position as well as the organization as a whole;
- Understands that authority rests with the board as a whole and not with individuals;
- Understands that the basis for all authority rests with the membership;
- Participates in opportunities for training;
- Commits the time and energy necessary to be an informed and effective leader;
- Assists those with less experience;
- Understands the distinctions between PTA and the school staff and refrains from performing functions that are the responsibility of the school district;
- Values, supports and advocates for public education;
- Represents the PTA only when authorized to do so.

The PTA Executive Board

The members of the PTA executive board work together as a governance team which assumes collective responsibility for building unity and creating a positive climate during term of office.

To operate effectively, the executive board

- Develops a unity of purpose by involving parents/guardians, students, staff and community;
- Communicates a common vision;
- Operates with trust and integrity;
- Remains responsive to input from the school community;
- Governs in a professional manner, treating everyone with civility and respect;
- Fulfills requirements set within bylaws and standing rules;
- Takes collective responsibility for the board's performance;
- Proposes for adoption by the membership a fiscally responsible budget based on the organization's vision and goals;
- Monitors the fiscal health of the association regularly;
- Ensures that safe and appropriate activities are provided to implement the goals;

- Provides community leadership on issues that affect children and youth;
- Works collaboratively with other groups and agencies that share the same concerns on issues that affect children and youth;
- Encourages individual board members to attend available training opportunities;
- Serves as a communication link between the home, school and community;
- Evaluates the activities and direction of the board on a regular basis.

2.3.10a PROCEDURES FOR ADOPTION OF PROFESSIONAL GOVERNANCE STANDARDS

The California State PTA has adopted the Professional Governance Standards and encourages all unit, council, and district PTA executive boards to review and adopt the standards at the beginning of their term as an integral part of their team building and orientation process; however adoption of the standards can take place at any time. The *Toolkit* includes the brochure entitled Professional Governance Standards (Forms 9), which includes a form that a PTA may complete upon adoption by a vote of the PTA board. The brochure can also be downloaded at www.capta.org/sections/basics/downloads/ProfGovStanBrochure.pdf

The PTA shall submit the form in the brochure to the California State PTA office after adoption and include the total number of board members and the expiration date of their term.

Upon receipt of the form completed and signed by the president, a certificate will be mailed to the PTA president by the California State PTA office. A letter of acknowledgement will be mailed to the PTA administrator.

Wallet cards for the number of board members noted on the form will be enclosed with the letter to the PTA president. The wallet card serves as an acknowledgement and reminder of the PTA board's and individual board member's commitment to adhere to the Professional Governance Standards.

2.3.11 Whistleblower Policy

This **Whistleblower Policy** of the California State PTA: (1) encourages directors, officers, staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the association; (2) specifies that the association will protect the person from retaliation; and (3) identifies where such information can be reported.

1. Encouragement of reporting. The association encourages complaints, reports or inquiries about illegal practices or serious violations of the association's policies, including illegal or improper conduct by the association itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or

audit matters, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which the association has existing complaint mechanisms should be addressed under those mechanisms, such as raising matters of alleged discrimination or harassment via the association's president or the council/district president. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

2. **Protection from Retaliation.** The association prohibits retaliation by or on behalf of the association against employees or volunteers for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. The association reserves the right to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.

Where to report. Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the basis of the complaints, reports or inquiries. They should be directed to the association president and the council/district PTA president; if the president is implicated in the complaint, report or inquiry, it should be directed to the only to the council/district PTA president. The association or council/district will conduct a prompt, discreet, and objective review or investigation. Officers, volunteers, and staff must recognize that the association may be unable to fully evaluate a vague or general complaint, report, or inquiry that is made anonymously.

2.3.12 Recommended Officers and Chairmen

All PTAs are required to have a president, secretary, and treasurer. Other officers may vary at the unit, council, and district PTA levels. All officers are listed in the bylaws. The president, as an effective leader, will see that officers receive their respective job guidelines promptly.

2.3.12a RECOMMENDED OFFICERS

Vice President(s)
Financial Secretary
Corresponding Secretary
Historian
Auditor
Parliamentarian

2.3.12b JOB DESCRIPTIONS FOR OFFICERS AND CHAIRMEN

The president should provide the officers and chairmen with their respective job descriptions as soon as possible.

Basic job descriptions for all elected and appointed officers are included in PTA bylaws.

In addition, Officer and Chairman Job Descriptions found in the *California State PTA Toolkit*, Job

Descriptions, Chapter 10, have been developed by the California State PTA for use by unit, council and district PTAs. These guidelines are meant to assist officers and chairmen in their duties throughout the term of office. The list includes the required president, secretary, and treasurer officer Job Descriptions and numerous others.

The job descriptions typically are distributed to members of the board-elect following election and are used with the updated procedure books forwarded by the outgoing officers and chairmen. PTAs are encouraged to develop job descriptions and procedure books for all PTA positions to provide continuity and sound leadership practices.

2.3.13 President

Serving as president of a PTA includes the responsibility to lead that PTA toward specific goals chosen by its members. The goals must be consistent with the Purposes and basic policies of the PTA. The president is the presiding officer and the official representative of the association.

Throughout the year, mailings will be sent from the California State PTA and National PTA that contain important material to assist the unit. Distribute and discuss these materials with the appropriate officers, chairmen and membership when appropriate.

PTA presidents should encourage and model legislative advocacy.

For PTA training, counseling, or information, contact the council or district PTA president.

All written materials produced by PTA (e.g., newsletters, fliers, website postings, and print or electronic notices) are to be cleared with the PTA president and school principal before publishing. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy. The PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.

Prior to Taking Office

To ensure a successful term of office, certain responsibilities begin as soon as new officers are elected.

The president-elect should confer with the school principal.

Call meetings as necessary of the board-elect (elected officers and principal) soon after election to ratify appointed officers, fill any vacant offices, and make plans for the coming year. After appointed officers are ratified, they become part of the board-elect.

Hold brainstorming session(s) with the board-elect to establish unit goals. Review unit bylaws, past unit activities, become familiar with National PTA and California State PTA goals, set realistic goals, and prioritize projects. Evaluate current chairman positions and decide which are needed. Ask for suggestions of people to fill chairmanships.