

OFFICER TRAINING 2026/2027

PRESIDENT'S TRAINING



Connecticut
PTA[®]

everychild.onevoice.[®]

PTA Mission
To Make Every Child's Potential a Reality by Engaging
and Empowering Families and Communities to Advocate
for All Children.

Judy Goldberg, CT PTA President



Believe in Children, Believe in PTA



**PTA MISSION: TO MAKE EVERY CHILD'S POTENTIAL A REALITY
BY ENGAGING AND EMPOWERING FAMILIES AND COMMUNITIES TO
ADVOCATE FOR ALL CHILDREN**

PTA VALUES:

- **COLLABORATION**
- **COMMITMENT**
- **DIVERSITY**
- **RESPECT**
- **ACCOUNTABILITY**

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WHAT DOES IT MEAN TO BE A LEADER?

- Motivating
- Respect
- Accountability
- Responsibility

What other traits does a good leader have?

WHAT DOES IT MEAN TO BE THE LEADERS OF THE TEAM

- **Duty of Care:** Take care of the nonprofit by ensuring prudent use of all assets, including facility, people, and good will;
- **Duty of Loyalty:** Ensure that the nonprofit's activities and transactions are, first and foremost, advancing its mission; Recognize and disclose conflicts of interest; Make decisions that are in the best interest of the nonprofit corporation; *not in the best interest of the individual board member* (or any other individual or for-profit entity).
- **Duty of Obedience:** Ensure that the nonprofit obeys applicable laws and regulations; follows its own bylaws; and that the nonprofit adheres to its stated corporate purposes/mission.

PRESIDENT'S DUTIES



- Preside at all meetings
- Along with Executive Committee, appoint committee chairs and members, as outlined in your Bylaws
- Coordinate work; approve all materials prior to distribution
- Sign all contracts
- Be familiar with financial procedures
- Be the 2nd authorized check signer with the Treasurer on the account.
- The President's job is not to DO all the work, but to EMPOWER the Board and Committee Chairs to do the work.
- Serve as the official representative of the association at PTA council meetings if applicable
- Be responsible for ensuring the completion of all SOA items with the Treasurer.
- Be the official contact for your unit
- Meet with the site administrator regularly (Principal, Superintendent)
- Perform other duties assigned by the association via your bylaws/procedure's manual



General Approach to Your Elected PTA Roles

- **PTA is a membership driven association.**
- **Your work is for the benefit of your school community, all the students, and the families.**
- **You will be running a small not-for-profit business.**
- **We are required to meet IRS and other regulatory guidelines**
- **Presidents and Secretary/Treasurers are the required positions for PTAs.**
- **All officers should have a close, working relationship**
- **Key officers should not be related or have a financial relationship.**

WORKING WITH YOUR PRINCIPAL

- **Meet consistently: discuss issues, review events, keep each other informed**
- **Work out problems or misunderstandings; be honest and direct**
- **Invite Principal to PTA board meetings**
- **Work as a Team**
- **Present PTA concerns and issues to principal and develop a forum for open discussion**
- **Council Presidents should build relationship with the Superintendent.**

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AGENDA DEVELOPMENT

When developing your meeting agenda, consider the following:

- Review prior meetings minutes – also look at the minutes of the meeting from last year to see what occurred
- Review calendar for upcoming events
- Check in with other officers for agenda items
- Refer to “Meeting Tips” worksheet (This is available at www.ctpta.org)
- Officer/Forms. This is password protected:
- **Password: Advocate23**

RUNNING THE MEETING

All board members should be present and greeting our paid members attending!!

- Plan ahead
- Have an agenda
- Start and end the meeting on time
- Include time limits for each discussion item
- Establish a quorum and vote on all action items
- Use parliamentary procedure
- Preserve order to be fair, impartial and respectful
- Remember that you act as facilitator as the meeting chair
- A good meeting is everyone's responsibility
- Did we ask everyone to join?



ALL PTA BOARD MEMBERS

- ▶ Adhere to PTA financial procedures as outlined in bylaws and State and National PTA guidelines
- ▶ Protect members' privacy by utilizing member information for PTA work only
- ▶ Maintain a current procedure book to pass on to a successor
- ▶ Work together as a team to improve the lives of all children and their families
- ▶ Follow Nominating Committee requirements for elections
- ▶ Resolve conflict early
- ▶ Build consensus and teamwork among board and committees

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givebacks

(formally memberhub)

CT PTA OFFERS GIVEBACKS TO ALL PTA'S IN CT- FREE

A HUGE SAVINGS AND A GREAT WAY TO HELP RUN YOUR PTA!

**GIVEBACKS IS BUILT FOR K-12 GROUP SUCCESS!
A \$1,000 SAVINGS FOR YOUR PTA!**

Over 12,500 K-12 parent groups trust GIVEBACKS to engage families and raise funds for their schools.

PTAs use GIVEBACKS to:

- ✚ **Keep families in the loop** with an easy newsletter builder.
- ✚ **Connect their community**, and **manage volunteers and events**.
- ✚ **Sell memberships, spirit wear and more online**.
- ✚ **Raise funds**- while keeping more, working less and getting expert help from end to end.
- ✚ **Reward their supporters** with savings through Givebacks.
- ✚ **And more!**

**PTAs that used their Givebacks e-Store to sell memberships online saw an average membership increase of 22%—
with some schools reporting growth as high as 350%!**

Shop to Give

Create a new passive giving donation stream for your organization with our exclusive Shop to Give program. Enable your supporters to do more without doing extra by automatically donating to your cause when they shop and dine. The merchant covers the donation!



Being a PTA leader and volunteer is a tough job.

GIVEBACKS makes your life easier by combining our membership database, compliance, communications, and payments all into one platform.

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Connecticut PTA has a dedicated Givebacks specialist ready to help PTA leaders across the state!

We'll walk you through setting up your Givebacks account and show you how to make the most of this FREE tool to grow your membership and fundraising efforts.

Contact CT PTA today and we'll connect you with our Givebacks expert, **Courteny**, who is ready to support you every step of the way.

 office@ctpta.org
 203-891-6140



2026-2027 CT PTA STANDARDS OF AFFILIATION

The Standards of Affiliation are the minimum annual requirements that a local PTA must complete in order to maintain Good Standing.

See next slide for CT PTA SOA.

PLEASE **NOTE DUE DATES** FOR EACH ITEM ON THE SOA!

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CT PTA STANDARDS OF AFFILIATION

2026-2027 SCHOOL YEAR

Stay Compliant. Stay in Good Standing. Support your PTA.

OFFICER INFORMATION	FINANCIAL REVIEW <i>(Required for Insurance by the due date)</i>	MEMBERSHIP FEES	IRS FORM 990	REQUIRED TRAINING	INSURANCE REQUIREMENTS	BYLAWS
Submitted annually	Required for all units. Form Issued by CT PTA	Submit via Givebacks or Check + UTR to office	Email to CT PTA	CT PTA TRAINING DAY Saturday, Sept 19th	Required for all If NOT using AIM- please provide proof of Insurance to CT PTA.	Review every 3- 5 yrs.
Update CT PTA with changes of officers throughout the year	Reviewers CANNOT have access to funds	Report monthly as new members join Minimums: -25 for all PTAs -10 for all SEPTAs	If filing for an extension-submit IRS approval.	Required for all Presidents & Treasurers	AIM users receive renewal Aug/Sept.	Must be submitted to CT PTA for review prior to membership vote.
If officers not reported, current officers remain on record.	Bank statements must be reviewed by a non check signer monthly	All officers must be paid PTA member.	After filing- send final 990 to CT PTA Make 3 copies: • IRS • CT PTA • PTA	Must be completed before November 15 th OR Within 60 days of taking office.	Protects: Officers, funds, events (Liability coverage)	CT PTA MODEL MUST BE USED.
Information shared with National PTA	Financial software reviews DO NOT meet requirements					Current bylaws must be followed to amend.
DUE JULY 1 OR IMMEDIATELY AFTER ELECTIONS.	INSURANCE REQUIREMENT Reviews due to CT PTA SEPTEMBER 15TH	KEY DEADLINE : OCTOBER 15 TH Then monthly when you attract new members	DUE TO CT PTA: OCTOBER 15 TH DUE TO THE IRS NOVEMBER 15 TH	SEPTEMBER 19 TH Quinnipiac University 370 Bassett Road, North Haven	Prior to October 1 st to avoid a lapse in coverage. REMINDER; Financial Review required prior.	REVIEW EVERY 3 -5 YEARS . Please contact CT PTA for questions

PTA MISSION:

To make every child's potential a reality by engaging and empoweirng families and communitres to advocate for all children.

*Stronger Together.
Better for All Children.*



CALENDAR PLANNING

Share PTA's Mission throughout your school.

July/August

- **Officer Information due to CT PTA by July 1st.**

Even if officers are remaining the same, officers must be reported.

There is an electronic link on the CT PTA website where officers are submitted.

- Fiscal year ends June 30th. Current Treasurer should gather and begin IRS 9900, due to CT PTA before October 31.

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• September CALENDAR PLANNING

• Financial review due to CT PTA

Due to CT PTA by September 15th

All PTAs must submit a financial review at the end of the fiscal year.

Needed for crime and fidelity bond insurance to be valid.

- Let everyone know we are here! Back to School night, Membership recruitment, Open House, Executive Board meeting; General Membership meeting;
- **Insurance: Current AIM policies expire 10/31/2026.** All PTA's must renew Insurance and have active Insurance for their PTA. Renewal policies are emailed to PTA Presidents in late August, early September.
For units who do not use AIM Insurance, you must provide proof of Insurance to CT PTA. Please forward your policy to office@ctpta.org
 - **QUESTIONS: contact CT PTA: office@ctpta.org or 203-891-6140**



CALENDAR PLANNING

October

- **Membership Fees** All PTAs submit membership to CT PTA either by Givebacks/MemberHub electronically or check to the office with a unit treasurer report. All PTAS must have a minimum membership of 25 paid members (10 for SEPTAs) submitted to CT PTA by October 15th. All officers of each PTA must be paid PTA members to be an officer. Membership continues to be submitted monthly when you have new members to report.

November

PTA Fun Time! Are we hosting a Family Engagement Event? Have we invited town officials to join our PTA? Let our community know we are here!

SHARE THE PTA MISSION!

CALENDAR PLANNING

December /January

- Winter activities, good time to look at bylaws, remember, bylaws must be reviewed and updated every 3 not to exceed 5 years. Contact CT PTA for updated model.
Volunteer Appreciation Event for winter PTA kindness!

February

- Participate in advocacy activities; celebrate CT PTA Founders Day (2/17).

March

- Elect nominating committee according to bylaws;
Plan for Teacher/Staff appreciation; review proposed school district budget

April

- Begin to prepare Annual Meeting & Election of Officers per your bylaws (usually April – June)

May

- Prepare budget for next fiscal year and present to Executive Committee/Board of Directors

June

- Close your fiscal year. Submit Officer Information Sheet to CT PTA (due July 1); budget to General Membership meeting for vote, installation of new officers, year end PTA event!

Don't forget to add CT PTA Events to your calendars!

CT PTA to share the dates

CT PTA Outstanding Educators – SUNDAY, MARCH 7, 2027

CT PTA Reflections Awards Ceremony DATE AND LOCATION TBA

CT PTA Symposium & Expo -2027 DATE AND LOCATION TBA

CT PTA Annual Meeting- THURSDAY, JUNE 3, 2027



FOCUS ON PTA MISSION

*Make every Child's potential a reality by
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CT PTA RESOURCES

CT PTA

office@ctpta.org

203-891-6140

www.ctpta.org

[Officers/forms
page on website](#)
(password protected)

Password: Advocate23

National PTA

www.pta.org



**LIKE CT PTA ON
FACEBOOK,
INSTAGRAM
& TIKTOK**

**At your 1st PTA Meeting,
have everyone take out
their phones and
like CT PTA!**



CT PTA
60 Wellington Road Suite F, Milford, CT 06461