



**PTA<sup>®</sup>**

*everychild. one voice.<sup>®</sup>*

# Working as A Board TEAM for Successful Board Management

*Presenter:*

*Deb Fritz*

*National Service Representative*



# Installation

## Welcome to the PTA Board

- Thank you for accepting...
  - this honor
  - this privilege
  - this responsibility
  - the hard workof being a Board member.



# Agenda for today...

- **Duties as Elected Officer**
- **Responsibilities for Non-Profit Management**
- **Obligation to Strengthen the Association**
- **Opportunities to Learn and Grow**
- **Q and A**



# Why Are Boards Important?

- **Required by Law**
- **Key to the fulfillment of the organization's mission**



# Two Major Roles of Board

- **To Govern** - delegated by the IRS law & the bylaws that give the duty and responsibility to make decisions and govern the PTA.
- **To function as a team** - exercise power as a *single entity* as recognized by SC and by PTA at all levels.



# Board as a TEAM

- **Only board has power and authority to act**
- **Specific roles to satisfy fiduciary responsibilities**
- **Responsible to know and abide by Standards of Affiliation to State and National Association**



# Duties

- **Fiduciary responsibility** – legal responsibilities of care (do no harm), loyalty (interest of the organization are first) and obedience (know & follow the rules)





# Board as a TEAM

Because Directors are persons who occupy a **position of such power and confidence** with regard to **the property of another**, the law requires him/her to act solely in the interest of the person/organization he/she represents.



# Therefore, **Directors must act:**

- in **good faith**;
- **with the care** an ordinary prudent person in a like position would exercise under similar circumstances; and
- in a manner the Directors reasonably believes to be **in the best interests** of the organization.



# Duty of Care

- The duty of care requires *active participation* in the organization's affairs by attending board meetings and meetings of committees on which the board member serves.



# Duty of Loyalty

- The duty of complete and undivided loyalty requires that the *interest of the organization* takes precedence *over* the board member's *personal interests*.



# Duty of Obedience

- The duty of obedience requires board members to be *faithful* to the organization's mission.



# Board TEAM responsibilities:

- Set policy
- Plan for the future
- Monitor and evaluate
- Advocate for the association
- Ensure expertise - training
- Ensure resources – human, financial
- Recruit & Renew - leaders, ideas



# The Board TEAM Sets Policy

- Developed, not just written, after gathering and deliberation, to meet specific needs.
- Evaluated regularly
- Updated for relevance



# The Board TEAM Plans for the Future

- Sets long and short range goals

*map*

- Vision of future—where it is going

*direction*

- Mission rules as cornerstone

*destination*





# The Board TEAM

## Monitors and Evaluates

- Structure
- Finances
- Progress
- Adherence to mission and vision



# **The Board TEAM**

## **Advocates for the Association**

- **Lobby for legislation**
- **Lobby funding sources**
- **Communicate with community re needs and successes**
- **Influence community and opinion**



# The Board TEAM Contributes Expertise

- Your own as individuals
- Your connections in the community
- Your knowledge of the nonprofit world and services



# The Board TEAM

## Delegates to the President

- President usually charged:
  - Run effective meetings
  - Ensure members are served
  - Assess and monitor board function
  - Protect policy
  - Lead long and short-range planning



# The Board TEAM

## Delegates to Committees

**Board is responsible for oversight and actions of the organization and all the work done by committees, officers and staff.**



# The Board TEAM

## Delegates to Committees

- Executive Committee
- Standing, temporary, special committees
- Committees report to the board



# The Board TEAM

## Recruits & Renews

- Recruit the right people
- Fill vacancies
- Appoint chairs
- Orient new recruits
- Keep the board sharp
- Develop new skills and leadership
- Develop new funding streams



# The Individual as a Board/Team Member

- **Listens** to others
- **Explains** his/her views
- **Keeps it friendly**
- **Is open** in disagreement, but **keeps it in the meeting**
- **Debates**, questions, and **respects**
- **Accepts** split votes
- **Supports** the vote, even if on the “losing” side





# What if something goes wrong?

- **Board skills are acquired and learned**
- **Conflict is constructive**
- **Self awareness is key**
- **You have support**



# Parent Professional

- **Build personal and professional skills**
  - Knowledge base
  - Management capabilities
  - Leadership skills
  - Communication skills
  - Conflict Management



# Questions & Answers



# Thank You!

- For attending and participating
- For your commitment to PTA
- For sharing the vision and spreading the good news
- For all you do for children



***Deb Fritz***  
***571-329-9345***  
***[dfritz@pta.org](mailto:dfritz@pta.org)***

***National PTA***  
***(800) 307-4PTA (4782)***  
***[www.pta.org](http://www.pta.org)***

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