



State President's Handbook 2010



Enhancing the state's capacity for leadership by reaching grassroots members and recruiting them to become TCBI Volunteer Trainers



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Introduction

INTRODUCTION

The purpose of National PTA® Training Capacity Building Initiative (TCBI) is to provide an additional resource of TCBI Volunteer Trainers to a state's training options at various levels of the association. As new trainers are developed yearly and trainers from previous years are retained your state will have a consistent and renewing pool of future trainers who may one day become future leaders in your state at the council, district, regional and state-levels.

*TCBI is all about **Capacity Building** – A term related to the many processes for strengthening nonprofit effectiveness; usually used in the context of helping nonprofits become more effective in meeting their mission.*



The TCBI program specifically focuses on providing training and development support to all levels of the association. Collaborative support is provided through other departments of the PTA to provide funding options and strategic alliances with partner organizations.

THE OVERALL GOALS OF TCBI

The goals of the TCBI program are the following:

- To enhance the state's capacity for leadership by reaching grassroots members and recruiting them to become TCBI Volunteer Trainers.
- To train local units primarily, but also train council, region, district, and state level PTA units on PTA-related topics. This will provide consistent messaging across the state and across the nation on PTA material.
- To encourage TCBI trainers to move on to other positions in their state (capacity building) and encourage a new set of grassroots trainers every year to begin training.

This will free state presidents and boards to administer and govern their PTAs as well as oversee the training options in their states without having the added task of developing and delivering training themselves.

THE “TRAIN-THE-TRAINER” EVENT

In October 2007 and 2008, grassroots PTA members from across the nation attended the four-day TCBI train-the-trainer event in Deerfield, IL. Members learned presentation skills, adult learning principles, workshop creation and design skills, and facilitation skills. On the final day of training, these volunteers made presentations using the skills they learned on a PTA-related topic of their own choosing. The TCBI Volunteer Trainers learned a key set of skills that enabled their ability to facilitate any National PTA Training Library material and deliver an already made presentation/workshop.

The TCBI Volunteer Trainers learned a key set of skills that also enabled their ability to create training materials from scratch at the request of their state on any given PTA topic. TCBI Volunteer trainer materials require adherence to specific development guidelines, taught at the TCBI train-the-trainer event, to ensure quality. Assistance from the National PTA Training Department is always available to TCBI Volunteer Trainers for help with facilitation and design of training materials.

TCBI COURSE OFFERINGS

TCBI Volunteer Trainers will be able to facilitate training that provides PTA audiences with the skills and resources necessary to achieve their goals. The National Training Library Workshop materials provided to TCBI Volunteer Trainers by National PTA will focus on the five drivers found in the 2007-2010 strategic plan:

- **Leadership**
- **Membership**
- **Diversity**
- **Organizational Effectiveness**
- **Financial Viability**

In addition, TCBI Volunteer Trainers are able to use and facilitate state-provided training materials, or create a workshop from scratch on an assigned topic to help your state reach its membership training goals.

An appendix of course descriptions for each workshop of the National PTA Training Library can be found at the end of this document in Appendix A.



Overall Goals

YOUR TCBI TRAINER: AN OVERVIEW

TCBI Volunteer Trainers from every state are placed in an intensive 4 day train-the-trainer program covering the following topics:

- Module 1:** Identifying My Training Skills and Learning Goals
- Module 2:** Using Adult Learning Principles
- Module 3:** Analyzing the Training Requirement
- Module 4:** Developing Learning Objectives
- Module 5:** Outlining the Training Content
- Module 6:** Selecting Training Methods
- Module 7:** Developing and Using Training Aids
- Module 8:** Developing a Lesson Plan
- Module 9:** Using Basic Facilitation Skills
- Module 10:** Handling Problem Situations
- Module 11:** Practice Training
- Module 12:** The Training Needs Analysis Process (Reporting Training Events)

These modules are focused on teaching the TCBI participants presentation skills, adult learning principles, workshop creation and design skills, and facilitation skills. In Module 11, the last day of training, TCBI Volunteer Trainers make presentations using the skills they learned on a PTA-related topic of their own choosing. After successfully facilitating a “mini training session” to their TCBI peers on the last day using the skills they learned, TCBI Volunteer Trainers participate in a graduation and receive a certificate of completion. They are now ready to accept any PTA topic you may assign them and present on that topic in your state.

Trainers are expected to complete *three* training events per year (many often do more!) within *three* hours of their home. Trainers often are asked to train local units, councils, regions or districts. They train state boards, and are asked to deliver workshops at state conventions, or leadership weekends. TCBI Trainers are passionate about training, and really enjoy being exposed to the larger world of PTA in their travels.

Often, TCBI trainers will seek other positions in the PTA. For some this will mean giving up training, and this is the capacity building goal of TCBI, to bring new trainers in as others move onward to different PTA positions. As of 2009, *five* people who started out as TCBI trainers are now state presidents, *nine* serve on the National PTA board, or a national committee, and about 50% of trainers have moved into different roles in their states.

HOW DO I UTILIZE MY TCBI TRAINER?

This section will cover the purpose of your TCBI Volunteer Trainer, how to utilize them, the reporting process, expectations of the TCBI Volunteer Trainer and State Presidents in the training process, and a note about related expenses.

INTRODUCTION TO UTILIZING A TCBI TRAINER

State Presidents or their designated representatives are to send out TCBI Volunteer Trainers at their discretion. State Presidents may designate a representative via the internet at: PTA.org/tcbirep. Training requests can come through a local unit, perceived need either from units or PTA officers, or through recurring events like leadership conferences, state conventions, or other scheduled events.

THREE - STEP PROCESS TO UTILIZING A TCBI TRAINER

1. Wait! We Need Training!

- Local unit(s) can benefit from PTA training in: leadership, membership, financial viability, organizational effectiveness, advocacy, or diversity.
- Existing units may need help or skill enhancement in: leadership, membership, financial viability, organizational effectiveness, advocacy, or diversity.
- A statewide initiative is undertaken (State Convention, Leadership Conference, etc.) and PTA volunteers need to be trained.

2. Proceed Carefully.

- A need for training has become apparent through interaction with or recommendations from local units, councils, districts or regions.
- Local units make a direct request for training.

3. Delegate Training

The state president or designated representative (State training or leadership volunteer, various council representatives, etc.) contacts the appropriate/regional TCBI trainer 2-6 weeks before the training event (using a pre-made workshop) or 6-12 weeks before the training event if the TCBI trainer is expected to create a training from scratch, and delegates the training task to them.

The TCBI Trainer then completes the Training Needs Analysis Form (TNAF) online at PTA.org/tcbi. Once submitted, copies are automatically sent to the state president, TCBI Training Coach, and the National PTA.

If the TNAF indicates training is needed: the TCBI Volunteer Trainer goes to the unit/event, conducts training, and submits evaluation forms for further assessment, coaching, and feedback.

The TNAF may indicate training is *not* needed due to an issue that will not easily respond to training. Then the National PTA Training Department, in conjunction with the National PTA Membership and Field Services Department, will help the state find an appropriate intervention.



Ten Tips

TEN TIPS FOR UTILIZING TCBI TRAINERS IN YOUR STATE

1. Ask trainers to present TCBI courses at regional or state conferences to grassroots members.
2. Engage TCBI Volunteer Trainers to be partners in a more comprehensive and effective PTA by engaging grassroots members.
3. Send trainers to newly formed PTAs and help get them up to speed quickly on becoming an effective unit.
4. Send TCBI Volunteer Trainers to existing PTAs that want motivation and inspiration.
5. Make sure TCBI Volunteer Trainers are utilized often and don't have to travel more than two to three hours from home, so they can be more available.
6. Upon fulfilling their training commitment, encourage TCBI Volunteer Trainers to continue to be an active member of PTA by seeking greater leadership roles.
7. Seek new grassroots PTA volunteers for next year's TCBI class, and send back this year's trainers, to build an ever increasing cadre of educated, skilled PTA trainers in your state.
8. Create a consistent PTA message within your state by utilizing the National Training Library and TCBI Volunteer Trainer(s) to stay abreast of core PTA content and relevant issues.
9. Stay updated on TCBI National Training Library Updates, to offer new and updated trainings to the PTAs of your state in Leadership, Membership, Diversity, Financial Viability, Advocacy, and Organizational Effectiveness.
10. Give TCBI trainers 2-6 weeks notice before the training (using a pre-made module), or 6-12 weeks if the TCBI Volunteer Trainer is expected to create a training from scratch.



COACHING

TCBI Volunteer Trainers are offered a training coach to assist them throughout their service as a volunteer trainer. Training coaches are staff members of the National PTA Training Department. Assistance to the TCBI trainer is offered in workshop design, facilitation skills, and soft skills coaching and development. Trainers may request assistance before a training event, or afterward to receive advice and tips to improve their skills. In the future, Training Coach(es) also review the TCBI Volunteer Trainers' evaluation forms, looking for trends, encouraging trainers in what they are doing well, and building their skill sets in areas which may need improvement. While the training coach(es) are available to assist TCBI Volunteer Trainers with development of a workshop, the training coach will not develop or write a workshop for the trainer. TCBI Volunteer Trainers are equipped to research and create workshops on their own.

THE TCBI WIKI SITE

The TCBI Wiki Site is a social networking web page where TCBI Volunteer Trainers share information with each other, download materials, keep up-to-date on announcements, report their training events, and contact their training coach(es). It's designed to be a one-stop resource for TCBI Volunteer Trainers in the field to connect with one another and have access to PTA training resources. State Presidents also have access to this webpage to keep up-to-date with the TCBI program and their state's trainers.

The TCBI wiki site is a closed community for TCBI Volunteer Trainers and State Presidents or their designated representatives only. An invitation from the National PTA Training Department is needed. To request access if you do not have access already please contact: **trainingdepartment@pta.org**. Once invited, the TCBI wiki site can be found at **PTA.org/tcbiwiki**. Go to the site and explore it today!

***Note:** WetPaint, the wiki operator, controls the username and password information for this site. If you forget your password or information you can click on "Forgot Password" on the log-in screen to change it. You must use the same e-mail address you used to register your presence on the site.*

ASSISTANCE

If you have any questions or concerns, or would like assistance or ideas about utilizing the TCBI program in your state, please contact the National PTA Training Department.

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Appendix A

Appendix A - National Training Library Workshop Descriptions

Calling All Men! Workshop Snapshot

Description of Workshop: Participants will learn information surveying all that PTA has to offer with the MORE Alliance. Participants will also learn a 6 step plan for male involvement and develop an outline based on these steps to take with them and implement in their communities.

Workshop Objectives:

- To express the need for Male involvement in Education.
- To Familiarize learners with the PTA MORE Alliance.
- To enable learners to develop an outline for Male Involvement.

Recommended Workshop Time: 60 Minutes, designed to train participants with 1 trainer per 50 people, per training session.

Why offer this workshop?

This workshop is offered to familiarize new or experienced PTA members' introduction to all that National PTA has to offer for Male Involvement. New and well-established PTA's alike will appreciate understanding the MORE (Men Organized to Raise Engagement) Alliance and its partners. Participants will be presented with a 6-Step male involvement plan and the opportunity in the workshop to outline a Male involvement plan for their community.

When should this workshop be offered?

This workshop is best offered to PTA's looking to involve men, diversify, find new members, and/or resemble their school populations, PTA's that may need to refocus their leadership and their mission, PTA's that wish to motivate and value their volunteers.

To whom should this workshop be offered?

This Calling All Men! Workshop is designed to be offered to local PTA units primarily, although district, regional, or state PTA leaders will also benefit. Activities such as the Male Involvement Outline will assist PTA members to implement a male involvement plan in their own communities.

This workshop is designed for 1 trainer per 50 people, during a 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Cultural Competency Workshop Snapshot

Description of Workshop: Participants will learn information focused on understanding, communicating with, and reaching out to various cultural groups.

Workshop Objectives:

- Describe at least one aspect of your own culture.
- Identify at least five types of cultural groups.
- List at least three features and dimensions of culture.
- Explain the 5 step process to becoming culturally competent.
- Recognize an effective approach (via case study) to positive interactions with an identified cultural group.

Recommended Workshop Time: 120 Minutes, designed to train participants with 1 trainer per 50 people, per training session.

Why offer this workshop?

This workshop is offered to enhance new or experienced PTA members' introduction to the topic cultural competency and learn cultural competency best practices. New PTA's will appreciate understanding the basics of cultural competency. Experienced and culturally competent PTA members will appreciate utilizing case studies that will help them understand cultural competency best practices. This workshop for experienced members will introduce several new ideas.

When should this workshop be offered?

This workshop is best offered to PTA's looking to diversify, find new members, and/or resemble their school populations, PTA's that may need to refocus their leadership and their mission, PTA's that wish to motivate and value their volunteers.

To whom should this workshop be offered?

This Cultural Competency Workshop is designed to be offered to local PTA units primarily, although district, regional, or state PTA leaders will also benefit. Activities such as the Case Study and Visible vs. Invisible Aspects of Culture exercise will prompt creative thinking regarding cultural competency.

This workshop is designed for 1 trainer per 120 people, during a 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Ethical Leadership Workshop Snapshot

Description of Workshop: This course will help participants “Do what ought to be done” with respect to handling PTA resources and personal interaction. It will also equip participants to better advance the mission and purposes, and vision, of the PTA at every level from Local Unit through National.

This workshop is also available as an E-Learning via **PTA.org**.

Workshop Objectives:

After completing this course participants will have:

- Viewed the current National PTA mission and purposes; vision; values; National PTA Basic Policies; and a generic PTA “Code of Ethics.”
- Explored ethical dilemmas that might present in their involvement with PTA using the “case study” method and identified an ethical course of action in each.

Recommended Workshop Time: 60 Minutes. This course is designed to train participants with 1 trainer per 50 people, per training session. This may be amended due to time constraints (less than 60 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Why offer this workshop?

This workshop is offered to enhance new or experienced PTA members' familiarity with National PTA Basic Policies, and to develop the ability to apply these policies to making ethical decisions in the PTA context.

When should this workshop be offered?

Ideally this workshop is offered to PTA leaders as part of a leadership preparation or leadership orientation program. It is also valuable for quickly introducing new members to PTA's mission, purposes, and vision.

Appendix A

To whom should this workshop be offered?

Ethical Leadership is designed to be offered to PTA units at all levels: local, district, regional, and state. It is also a suitable workshop presentation for district, regional, and state conventions.

This workshop is designed for 1 trainer per 50 people, during a 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Leadership Skills Workshop Snapshot

Description of Workshop: Participants will learn information focused on PTA leadership, communication, and motivation.

Workshop Objectives:

- Participants will be able to define the term leadership.
- Participants will be able to define the three main leadership styles common in PTA.
- Participants will explore how to keep PTA volunteers engaged and motivated.

Recommended Workshop Time: 90 Minutes, designed to train participants with 1 trainer per 50 people, per training session.

Why offer this workshop?

This workshop is offered to enhance new or experienced PTA members' leadership skills. New PTA's will appreciate understanding effective styles of leadership, and motivational ideas to keep volunteers engaged in the life of their PTA. Experienced PTA members will appreciate thinking about leadership and motivation "outside the box" of traditional thinking. This workshop experience for experienced members will introduce several new ideas and remind them of classic tried and true methods as well.

When should this workshop be offered?

This workshop is best offered to new PTA's, PTA's in leadership transition, PTA's that may need to refocus their leadership and their mission, PTA's that wish to motivate and value their volunteers.

To whom should this workshop be offered?

This Leadership Skills Workshop is designed to be offered to local PTA units primarily, although district, regional, or state PTA leaders will also benefit. Activities such as the Leadership Zoo and Leadership Qualities Game will prompt creative thinking regarding effective leadership. A review of Volunteer Needs and Motivation will inform all PTA leaders of "why" parents and teachers join PTA and make every child's potential a reality.

This workshop is designed for 1 trainer per 50 people, during a 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Membership Recruitment Workshop Snapshot

Description of Workshop: Participants will learn information focused on meeting or exceeding membership recruitment goals.

Workshop Objectives:

- Participants will be able to identify at least two responsibilities of a membership outreach team.
- Participants will be able to define the 3-step recruitment process.
- Given the recruitment process, participants will be able to design a recruitment campaign.

Recommended Workshop Time: 90 Minutes, designed to train participants with 1 trainer per 50 people, per training session.

Why offer this workshop?

This workshop is offered to help local units reach their membership outreach goals and increase membership. Participants will be able to learn and define a 3 step recruitment process that will aid in increasing membership. Once learned, this recruitment process will allow participants to design and implement a recruitment campaign.

When should this workshop be offered?

This workshop is best offered to all levels of PTA, especially local units. Although oriented toward a local unit, new or experienced PTA officers at the council, district, region, or state level will learn new tips and information. This may be helpful for new units, units with new members, or units seeking to increase their membership.

To whom should this workshop be offered?

This Membership Recruitment Workshop is designed to be offered to local PTA units primarily, although council, district, regional, or state PTA leaders will also benefit. By promoting membership recruitment across the PTA, the education of our children is insured for our common future to make every child's potential a reality.

This workshop is designed for 1 trainer per 50 people, during a 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Preventing Theft Workshop Snapshot

Description of Workshop: Participants will learn information focused on preventing theft, fraud, and embezzlement in their PTA.

Workshop Objectives:

- Participants will be able to define the terms: theft, fraud, and embezzlement.
- Participants will be able to recognize at least 10 warning signs of theft, fraud, and embezzlement.
- Participants will gain 10 tips for fraud prevention.
- Participants will learn what to do when theft is suspected.

Recommended Workshop Time: 90 Minutes, designed to train participants with 1 trainer per 50 people, per training session.

Why offer this workshop?

This workshop is offered to raise awareness of and prevent Theft in PTA's across the country. Theft is a serious issue in PTA's at every level. This workshop will expose learners to several warning signs of theft, tips to prevent theft, and what actions to consider if theft has occurred in their PTA's. This workshop will also briefly review the need for insurance, and the impact of theft on the local community, and the PTA's mission at large.

When should this workshop be offered?

This workshop is best offered to all levels of PTA, especially local units. Although oriented toward a local unit, new or experienced PTA officers at the council, district, region, or state level will learn new tips and information on preventing theft in the PTA.

To whom should this workshop be offered?

This Preventing Theft in Your PTA Workshop is designed to be offered to local PTA units primarily, although council, district, regional, or state PTA leaders will also benefit. By promoting financial safety across the PTA, the education of

Appendix A

children is insured for our common future to make every child's potential a reality.

This workshop is designed for 1 trainer per 50 people, during a 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.

Tools for Schools! Workshop Snapshot

Description of Workshop: Participants will learn information surveying all that PTA has to offer Advocacy, Membership Initiatives, Member Benefits, Training, and more.

Workshop Objectives:

- To familiarize learners with PTA Resources
- To enable learners to recall key programs through the Matching Game.

Recommended Workshop Time: 60 Minutes, designed to train participants with 1 trainer per 50 people, per training session.

Why offer this workshop?

This workshop is offered to familiarize new or experienced PTA members' introduction to all that National PTA has to offer. New and experienced PTA members will learn about PTA initiatives and benefits. This workshop will briefly provide a vast overview and links to resources of all that PTA provides to its members. Many changes have taken place at the national level and this workshop contains the latest information, all in one location.

When should this workshop be offered?

This workshop is best offered to new and experienced PTA's, to schools considering forming a PTA, to PTA's looking to find new members, and/or resemble their school populations.

To whom should this workshop be offered?

This Tools for Schools! Workshop is designed to be offered to local PTA units, district, regional, or state PTA leaders. Activities such as the matching game will prompt active recollection of a variety of PTA programs.

This workshop is designed for 1 trainer per 50 people, during a 60 or 90 minute session. This may be amended due to time constraints (less than 90 minutes) or participants greater than 50. Your TCBI trainer has been given the skills to make these adjustments possible.



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