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National
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 2010-2011
THE OFFICIAL
PTA[®]
KIT

**PTA PRESIDENT'S
QUICK-REFERENCE
GUIDE**

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Welcome

Welcome to PTA® leadership! You're in a great position to help children succeed!

As a PTA leader, you focus your community on the needs of your members and their children. Your leadership will motivate volunteers and persuade local decision makers. You and your team will communicate with teachers and administrators, raise funds and awareness, provide much-needed programs for students and families, encourage reading and the arts, and much, much more.

Because of you and your fellow PTA members, the children and schools of your community will be more successful.

Why lead a PTA?

Because...

- PTA is the number one voice for parent involvement.
- Children succeed when families, schools, and communities work together. PTA helps develop those relationships through resources, programs, and advocacy.
- You're not alone. PTA is a network of trained and passionate volunteers just like you, ready to assist you when you need help.
- You are part of a powerful voice for all children, working with like-minded people around the country and the world to improve the education and well-being of our youth.
- You are supported by real people who will connect you to information about children and education you can use today.
- PTA makes a big difference by influencing the decisions of legislators and leaders of other organizations—and PTA works with parents locally to ensure proper funding, leadership, and instruction for all schools and school districts.
- You can be a role model to your children and your community!

Thank you for all you do. We hope this *PTA President's Quick-Reference Guide* will be a useful tool as you lead your PTA.

PTA Resources

Overview

Every person who joins a local PTA automatically becomes a member of both his or her state PTA and the National PTA and receives support from a national network of peers. With your help, we can continue to work toward PTA's goal of a quality education and a nurturing environment for every child. Together we are a powerful voice for children.

The following partial list of resources for leaders will help you make the most of your PTA year.

Electronic Resources

- National PTA's home on the Web is **PTA.org**.
- Take courses for free, without travel, at **PTA.org/e-learning** and develop your skills.
- Subscribe to and read National PTA's e-newsletters: **PTA Local Leader News**, **The PTA Parent**, and **PTA Takes Action Update**.
- For successful project ideas and more, visit the **PTA Great Idea Bank** at **PTAgreatideabank.org**. Search for ideas, discuss membership campaigns, and trade PTA management tips with fellow leaders and members. There's a wealth of knowledge to be shared!
- The **Public Policy** section of the National PTA website (**PTA.org/advocacy**) connects you to federal education policy and gives you what you need to launch an advocacy program or campaign in your community.
- **Membership Marketing Templates and Tools** are available to local unit presidents and membership chairs to aid and enhance membership recruitment and retention activities. These resources are available online at **PTA.org/marketing**.
- **National PTA programs** help your school community increase family engagement and support the educational success, health, and well-being of children. Learn more at **PTA.org/programs**.

Printed Resources

- **Our Children** magazine, loaded with great information on running your PTA, parenting, and more, is published five times a year. Look for your issue each August, October, December, February, and April.
- The **Official PTA Kit** is jam-packed with resources, member benefits, and *PTA Quick-Reference Guides* like this one to help you kick off your school year, engage families, and manage your PTA throughout the year.

National PTA Convention

Attend the National PTA Convention, held each June, to develop your leadership skills, network with PTA and school leaders, and vote on PTA business. The annual national convention includes workshops, featured speakers, award presentations, an exhibit hall, and special events.

Getting Your Year Started

Your Development as a PTA Leader

This *PTA President's Quick-Reference Guide* was created to help you be an effective leader who:

- Sustains and increases a diverse and inclusive membership
- Works collaboratively with school staff and community
- Conducts programs that encourage all parents to be involved in children's education
- Helps keep parents informed about student achievement, as well as student health and well-being
- Organizes actions to address student achievement, health, and well-being
- Develops PTA unit leadership for the future



CONTACT

Contact Us

Contact the National PTA Information Center at (800) 307-4PTA (4782), or e-mail info@PTA.org.

Visit PTA.org.

The PTA Mission



TIP

Our Purpose

- To promote the welfare of children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, so that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

National PTA comprises millions of families, students, teachers, administrators, and business and community leaders devoted to the educational success of children and the promotion of family engagement in schools.

Spread the Word About PTA



Frequently Asked Questions About PTA

The PTA difference is the quality of the association, its mission, its history, and its national network of resources. Local PTA leaders have access to ideas and help from other PTAs across the nation. PTAs are registered nonprofit 501(c)(3) nonprofit associations run by volunteers. PTAs receive benefits that include family-, student-, and school-focused programs; training; guidance in starting and running a nonprofit organization; and materials for use in local units and schools.

What Does It Mean to Be a PTA?

- PTAs benefit everyone. Strong schools mean stronger communities. PTA membership is open to anyone who wants to be involved and make a difference for the education, health, and welfare of children and youth.
- PTAs improve children's well-being. PTAs focus on what students need to be successful in their learning, including proper nutrition, safety, and healthy environments.
- PTAs keep parents informed. Involved parents can understand the challenges schools face and become part of the solution. PTAs support education through active participation and advocacy.
- PTAs can help schools fulfill parent involvement requirements mandated by the Elementary and Secondary Education Act–No Child Left Behind Act (ESEA–NCLB). Why? Because PTA's definition of parent involvement is the definition used in ESEA–NCLB. Getting involved in PTA is the best way to utilize parent involvement. More than 85 rigorous research studies conducted over 30 years show that kids do better when parents are involved. Grades are higher. Test scores improve. Attendance increases.

Every PTA unit selects its own programs and activities. While National PTA creates many successful programs for local units to use, *there are no required programs*.

PTAs collaborate in their local communities with administrators, lawmakers, and community-based organizations. They can make the decisions that will best serve their needs.

Basic Policies of PTA

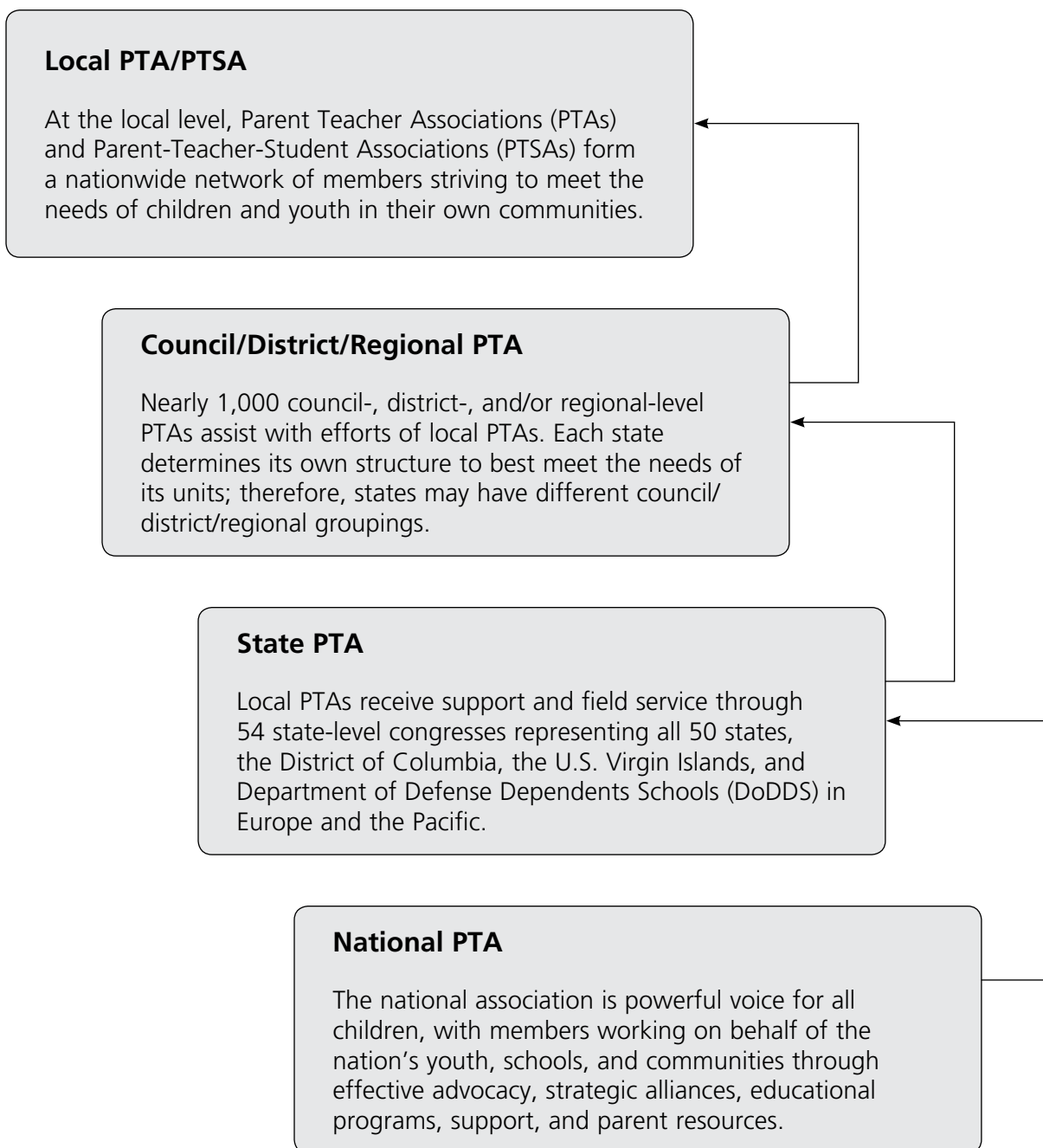
The following are basic policies of National PTA:

- The organization shall be noncommercial, nonsectarian, and nonpartisan.
- The organization shall work with the schools and community to provide quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- The organization shall work to promote the health and welfare of children and youth and shall seek to promote collaboration among parents, schools, and the community at large.
- No part of the net earnings of the organization shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers, or other private persons except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the purposes of PTA.
- Notwithstanding any other provision of these articles, the organization shall not carry on any other activities not permitted to be carried on (i) by an organization exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an organization, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.
- Upon the dissolution of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations that have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of National PTA.
- The organization or members in their official capacities shall not, directly or indirectly, participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office, or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

PTA Organization

Overview

The PTA local unit is connected to its state PTA and to National PTA, forming a nationwide network of members working on behalf of all children and youth.





Frequently Asked Questions about Dues

FAQ

Where do the dues go?

Locally, dues go toward projects that the membership decides to do. In addition, they support advocacy efforts and the creation of resources at the state and national levels.

e-newsletters	PTA Takes Action	Member benefits	Just Between Friends
PTA Parent	action alerts	PTA.org	free online database
PTA Partners in Leadership	advocacy network	parent & leader resources	e-mail
PTA Local Leader News	PTA Takes Action Update	bulletin boards	membership cards
	PTA Public Policy Agenda	news	Official PTA Kit
	National training	PTA blog	Quick-Reference Guides
	Emerging Minority Leaders Conference	multimedia library	Leaders Guide
	National convention	PTA Great Idea Bank	marketing and membership materials
	e-learning courses		special offers from national partners
National programs	PTA Family Expo!	social networking	The Power of Partnerships
Reflections	Training Capacity Building Initiative (Wiki)	PTA YouTube Channel	
PTA MORE	State & Local Training	PTA Facebook fan page	
Three for Me	National awards	@PTAeditor on Twitter	
PTA Teacher Appreciation Week	PTA Take Your Family to School Week (\$1897 Awards)	PTA photos on Fotki	
Urban Family Engagement	PTA Movie Night Live!		
	PTA Outstanding Advocacy Award		
	National Standards		
	Shirley Igo Advocate of the Year Award		
	PTA Healthy Lifestyles (Awards)		
Let's Fight Flu Together!	Phoebe Apperson Hearst Family-School Partnership Awards		
PTA Goes to Work	Mary Lou Anderson Reflections Arts Enhancement Grants		

The Value of Membership



Your Role as a PTA President

Overview

The role of PTA president is a very rewarding one. Your unit will look to you for guidance in creating partnerships within your school community and fostering an environment where parent involvement is encouraged and respected. Over the course of the school year, you will learn a great deal and put your talents and knowledge to use as a leader in your school community.

You will oversee:

- Unit organization
- Meetings
- Membership
- Governance
- Inclusiveness
- Elections
- Programs
- Member training
- Finances

You will use your skills in:

- Organization: planning, setting priorities
- Volunteer management: recruiting, retaining, motivating, welcoming diversity
- Running effective programs
- Managing money matters, raising funds
- Running effective meetings
- Effective use of parliamentary procedure
- Effective advocacy on behalf of students
- Leadership transition: nurturing potential leaders, preparing the incoming team



STEP BY
STEP

Your First Tasks Step by Step

As a new PTA president, you should immediately:

- Contact your state PTA. Let them know who you are and give them a list of your officers, including contact information for each person.
- Talk with the outgoing president and officers about the PTA's status and seek their recommendations for the coming year. Thank them for their work.
- Introduce yourself to the school staff, including your principal. Offer to work collaboratively this year.
- Review the procedure book. If you did not receive a procedure book from the outgoing president, or if you want to be sure yours is complete, use the checklist below.
- Make sure that a proper audit of your PTA's books is conducted at the end of the outgoing officers' terms and that IRS reports are filed when due.
- Change the signers on the PTA's bank accounts.



CHECKLIST

Procedure Book Checklist

The procedure book should contain a record of work done and other helpful materials. It usually is compiled by officers during their terms and passed on to allow officers and committee chairs to build upon past successes. A procedure book should include the following:

- A copy of the local, state, and National PTA bylaws
- A copy of the budget
- Standing rules
- Programs for the year
- Materials from workshops or conventions
- List of officers' and chairs' addresses, telephone numbers, and e-mail addresses
- Special information relating to offices or chairs, including current work plans
- Updated job descriptions
- A list of other files and resources kept by your PTA, and their locations
- Correspondence and files from past years. Check legal requirements for keeping certain files. Minutes must be kept permanently, and financial records should be kept for seven years.
- Agendas, minutes, and reports
- A list of resource people and organizations with their contact information
- A file or scrapbook of newsletters, newspaper articles, business cards, etc.

Your PTA Board of Directors

Basic Board Responsibilities

Your board of directors is your core team. An effective board makes your role easier and ensures that your PTA will meet its goals for the year. In addition to the president, your PTA should have a vice president, a secretary, and a treasurer as part of its board. You also may have committee chairs on your board for membership, advocacy and legislation, and other roles as set in your bylaws.

Make sure each board member's role matches his or her interests and abilities.



CHECKLIST

Board Success Checklist

Boards succeed when:

- An orientation or kickoff meeting is held inviting all board members.
- Board members have a good understanding of their specific roles and how to work together. Put it in writing for them and include job descriptions.
- There is planned rotation. Boards grow stronger when they consistently recruit new members and leaders. Hint: Establish all positions with clear beginning and ending dates.
- Established standing committees set goals and develop and implement action plans that benefit the association.
- A process for self-evaluation is in place. The board should conduct an annual evaluation of all goals and actions taken by the association.
- They establish a plan of work, including budget, for each activity or program.
- There is meaningful two-way communication between all involved parties: the president and the board, the PTA and the school, and the PTA and its members.

Vice President

The vice president may be called upon at any time to assume temporarily the place of the president; therefore, he or she should study the president's duties and responsibilities and be familiar with the work of the PTA. In the event of the president's resignation, the vice president assumes all duties until the president's position is filled in accordance with the bylaws.

The vice president is responsible for:

- Performing specific duties as provided for in the bylaws
- Assuming responsibility for duties designated by the president
- Representing the president in his or her absence or upon request

Secretary

The secretary is responsible for keeping an accurate record of the proceedings of association meetings. These records are the history of the PTA. Promptness, accuracy, and knowledge of PTA policies are key to this job. The secretary should be committed to helping the president conduct a businesslike meeting.

The secretary is responsible for:

- Recording minutes of PTA meetings, with special attention given to motions (recorded exactly as stated) and action taken
- Keeping secure official, permanent PTA records, including all originals of approved minutes
- Maintaining a copy of current bylaws and standing rules, as well as the membership list

The secretary should have these items on hand at all meetings:

- Minutes of the previous meeting
- Copies of the previous treasurer's report
- List of unfinished business to be discussed
- Agenda
- Current bylaws and standing rules
- Current membership list
- List of committee chairs
- Materials for note/minute taking

The secretary also may be given the responsibility of maintaining all PTA correspondence, including incoming and outgoing communications with members and notifications for all meetings. It is common for a local unit to designate these responsibilities to a corresponding secretary.

Treasurer

The incoming treasurer should discuss with the former treasurer the status of current fundraising activities, what money is available to be spent versus what is owed, and the bylaws as they relate to the treasurer's responsibilities.

The treasurer is responsible for:

- Ensuring that the PTA's financial records are reviewed according to the bylaws before assuming duties
- Having three authorized signatures on file at the bank for financial transactions, including those of the president, treasurer, and one other officer as an alternate (no two check signers should be from the same household)
- Obtaining two authorized signatures on every check
- Collecting all money from persons delegated to collect or to raise funds during a local unit activity, and providing a written receipt for those funds
- Depositing all money in the name of the local unit in a bank account approved by the board
- Maintaining an accurate record of all receipts and disbursements
- Obtaining authorization from the board before writing a check or spending money
- Remitting, by check, all authorized bills and statements as prescribed in the bylaws
- Submitting a written financial statement at each board meeting and at each general membership meeting
- Chairing the Budget Committee and preparing the annual budget as prescribed in bylaws
- Reporting income and expenses as compared with the budget
- Preparing an annual report to be used to review PTA financial records

The *PTA Money Matters Quick-Reference Guide*, available at PTA.org/MoneyQRG, will help orient the treasurer to his or her main areas of responsibility.

Your Committees

Types of Committees

Committees plan and promote the activities of the local unit. Committees are designated in two ways:

- 1. Standing committees** are permanent. These committees conduct business year-round.
- 2. Special committees** conduct specific business on an ad hoc (as-needed) basis. These committees dissolve when business is complete.

A committee begins with a plan of work for the year that includes goals, action steps, timelines, and an evaluation for each activity. A plan of work form can be found on page 29.

A committee consists of three or more persons who have been appointed or elected on the basis of their qualifications. A definite purpose is established for each committee, and committee actions are subject to the control and direction of the association.

Since all committees have power to do only that which they are instructed to do, they should receive such instruction from the group by which they have been created (which is often the board of directors).

Suggested committees include, but are not limited to:

- Membership
- Programs
- Legislation
- Reflections
- Newsletter/Communications
- Health and Welfare
- Budget
- Bylaws
- Public Relations
- Nominating
- Hospitality

Committee Chairs

Committee chairs are responsible for the actions and activities of the PTA, including planning, communication, and receiving board or membership approval.

General committee chair responsibilities include:

- Providing notice of all meetings to all committee members, including the PTA president
- Working closely with other committee chairs (possibly combining efforts) so duplication will be avoided and programs and projects will be strengthened by new ideas and manpower
- Preparing committee reports for meetings
- Seeking member and board approval before taking any action (including distribution of public notices)

Your Goals for the Year

Overview

An effective PTA:

- Conducts at least one program or project that provides an opportunity for parents to be involved in the school.
- Conducts at least one program or project that increases awareness among parents about issues that affect student achievement or school success.
- Attends the state PTA convention or other state PTA-sponsored events.
- Increases and sustains its membership.



Creating Goals Step by Step

1. Assess the needs of your school community by communicating with the principal and teachers. Conduct a survey of all parents to find out what they want and need, as well as who they are. Invite them to join PTA. A sample needs assessment survey and scoring guide is available on the following pages.
2. Develop objectives for actions based on the results of your needs assessment.
3. Propose your plan for meeting the objectives at a PTA meeting. Invite all school staff and parents to attend.
4. Vote on the adoption of the plan and incorporate your PTA's goals into your annual calendar.

Review the free e-learning course Running a Successful Program at PTA.org/e-learning to help you determine what programs will help you meet your objectives.

Sample Needs Assessment Survey

ABC PTA needs your help. To provide you with the types of programs and services you need and want, ABC PTA asks you to complete the following survey. Your answers will help us help you and your child. Please fill in or circle your answers, as appropriate.

1. Please fill in the grade of each child you have in school. _____

2. Are you a member of ABC PTA?

A Yes **B** No

3. Please rank the following in order of importance to you:

(1 = most important, 11 = least important)

___ Safety and security when my child is at school

___ Healthy food choices for my child at school

___ Resources on parenting

___ Physical education or activities for my child at school

___ Arts education for my child at school

___ Improving my child's academic success

___ Opportunities to be involved at school

___ Opportunities to interact with other parents and families

___ Effective parent-teacher communication

___ Adequate funds for my child's school

___ Other (please specify _____)

4. If ABC PTA announced it would act on the area of most importance to you, how likely would you be to get involved?

A Very likely

B Somewhat likely

C Somewhat unlikely

D Very unlikely

Sample Needs Assessment Survey

5. Overall, how satisfied are you with how ABC PTA serves your school?

- A** Very satisfied
- B** Somewhat satisfied
- C** Somewhat dissatisfied
- D** Very dissatisfied

6. In your opinion, what are the strengths of ABC PTA? What successful things can it build on?

7. In your opinion, what are the weaknesses of ABC PTA? What challenging things can it improve on?

8. Please add any other comments you might have on ABC PTA and your school.

**Please complete and return this survey by (date), to (person's name)
at (address or drop-off location).**

Thank you for participating in this survey!



TOOLS

Scoring Guide for Needs Assessment Survey, Question 3

Survey Choices	Possible Program Choice(s)
Safety and security when my child is at school	Bullying prevention
Healthy food choices for my child at school	Nutrition and portion control
Resources on parenting	Talking to your child about tough subjects
Physical education or activities for my child at school	Obesity prevention
Arts education for my child at school	Music , the arts, craft nights
Improving my child’s academic success	Helping children develop good study habits
Opportunities to be involved at school	Volunteer training and opportunities
Opportunities to interact with other parents and families	Pizza night, family night events
Effective parent-teacher communication	Parent/teacher/principal get-together, parent-teacher conference basics
Adequate funds for my child’s school	Advocacy workshop on education budgets; fundraisers for PTA projects and activities

Partnering with the Principal and Teachers

Overview

The PTA president and the school principal must operate as a team. Partnerships are strongest when each understands the other's responsibilities, develops rapport with parents and staff, and commits to cooperating for the well-being of all students. It is also very important to build similar partnerships with teachers so they have a voice in PTA decisions.



TIP

Partnership Tips

Suggestions for partnering with principals:

- Send a strong message of support—ask principals what their goals are for the year and how PTA can help them achieve those goals.
- Arrange for a monthly or quarterly “coffee talk” with the principal so your PTA can keep current on school issues. Plan your conversations by writing down the points you want to share. Invite PTA members, as appropriate. Take notes.

Suggestions for partnering with teachers:

- Schedule meetings in advance.
- Ask teachers how the PTA can best support them in the coming year.
- When you check in to see how your child is doing, ask how the teacher is doing, too.
- Approach all interactions with a spirit of cooperation.
- Invite teachers to participate in your PTA.



LINKS

Building Successful Partnerships with Your School and Community

Find PTA's National Standards for Family-School Partnerships, an assessment and implementation guide, and more resources to bring families, schools, and communities together at [PTA.org/Partnerships](https://www.pta.org/Partnerships).



GLOSSARY

Key Terms: School Administration

Here are some key terms to know when speaking with principals and teachers about education policies:

Elementary and Secondary Education Act–No Child Left Behind Act (ESEA–NCLB)—National legislation intended to raise the academic achievement level of all children.

Adequate yearly progress (AYP)—An incremental measure of annual progress toward proficiency in grade levels.

Performance standards—Progress a student is expected to make by the end of a particular grade.

Highly qualified teacher—A teacher who has obtained full state teacher certification or has passed the state teacher licensing exam, holds a minimum of a bachelor’s degree, and has a demonstrated subject-area competence.

Disaggregated data—Test results sorted according to special student-population characteristics, including economic disadvantage, race, ethnic groups, physical disabilities, and limited English fluency.

Local education agency (LEA)—A public board of education or other public authority within a state that maintains administrative control of public schools in a city, county, township, school district, or other political subdivision of a state.

State education agency (SEA)—A public board of education or other public authority that is responsible primarily for the supervision of a state’s public schools.

Parental Information and Resource Centers (PIRCs)—Statewide centers that provide capacity-building to schools, LEAs, and SEAs to implement effective parent engagement policies, programs, and activities that raise student academic achievement and strengthen partnerships among families and schools.

Supplemental services—Tutoring or academic assistance provided at school districts’ expense to students from low-income families who have been identified as failing for two years.

Proficiency—Mastery of an appropriate grade-level task.



TIP

Community Partnership Tips

It is crucial that you know the demographics of your community and its key decision makers so that you can target community needs and reach people who can make things happen. Also, get to know other community groups so that you can work together. Cooperation with the community will make your PTA a strong, key player inside and outside the school.

State and National Contacts

Overview

As you begin your year as PTA president, you will encounter situations in which you feel unsure of the “right” answer. Remember that you are part of a national network, all members of which share the same mission. Someone will be available to help you by phone, e-mail, online networks, or in person. Just ask!



CONTACT

Contact Us

Your state PTA is available to guide you in matters that are unique to your area and can provide valuable resources to help you fulfill your responsibilities.

In addition, you are always encouraged to send comments or questions to National PTA. Information Center representatives will respond directly to your question or forward your inquiry to the appropriate person at the National PTA office or your state PTA for response.

National PTA Headquarters

1250 N. Pitt Street
Alexandria, VA 22314

Toll-Free: (800) 307-4PTA (4782)

E-mail: info@PTA.org

Website: PTA.org

State Offices

Find a web directory of all PTA state offices at PTA.org/States



LINKS

Additional Support Resources

You can connect with National PTA and other PTA leaders through:

- PTA Great Idea Bank (PTAgreatideabank.org)—Updated regularly with successful ideas used by some local units.
- Facebook ([Facebook.com/ParentTeacherAssociation](https://www.facebook.com/ParentTeacherAssociation))—“Become a fan” of the Parent Teacher Association on Facebook to get updates and connect with other fans.
- Twitter ([Twitter.com/ptaeditor](https://twitter.com/ptaeditor))—Follow @ptaeditor on Twitter for updates on education-related issues and PTA efforts.
- National PTA messages—Hear more from National PTA through the PTA Blog (PTA.org/Blog), PTA Radio (PTA.org/PTAradio) and National PTA’s YouTube channel ([YouTube.com/nationalpta](https://www.youtube.com/nationalpta)).
- Fotki (Fotki.com/pta)—See pictures from PTA events nationwide.

Many state and local PTAs, and PTA members, can also be found on Facebook, Twitter, and other social media. Get connected.

Local Contacts

Complete the grid on the following page and share it with your PTA board and the school staff. Don’t forget to write the name of your PTA at the top of the grid before making copies.



CONTACT

Contact list for _____

Your Board	Name	Phone	E-Mail	Address
PTA President				
PTA Vice President				
PTA Secretary				
PTA Treasurer				
PTA Membership Chair				
_____ Chair				
_____ Chair				
_____ Chair				
Your Local PTA Unit ID Number*: _____				
Your Unit EIN**: _____				

*Check "Find Your PTA" at PTA.org for this number.

**Check with the state PTA office or the unit's treasurer for this number.

Leadership Transition

Overview

When leadership transition isn't planned for, it can be disruptive and costly. So start the process as soon as you begin your term! Assess the strengths and weaknesses of board members, then identify at least three people with the potential to become president.

As president, it is your responsibility to encourage future leadership, and you should give potential leaders an opportunity to "step up":

- As a representative of your PTA at events, such as school board meetings or other local meetings
- As a chair of a committee
- Through special assignments

Presidents do not anoint successors. No president should ever sit on a nominating committee, but you are in a unique position to recognize leadership potential. If individuals rise to the challenge when given a chance, you can nurture them further by:

- Bringing them with you to regular meetings with the principal or superintendent
- Providing training opportunities and encouraging them to attend state- or council-sponsored leadership trainings and state conventions,
- Sending them to act as delegates to report on school board meetings
- Allowing them to lead a group discussion on setting goals for next year



CHECKLIST

Transition Checklist

Creating a smooth transfer of leadership responsibilities ensures that your PTA remains healthy and active—and that children continue to benefit. An incumbent president should:

- Meet with the incoming leadership team.** Discuss the past year's successes and failures, the coming year's objectives and expectations, and how to facilitate the transition. Help the new leaders get to know the community, its people, its goals, and its traditions.
- Arrange meetings with contacts.** Make personal introductions for the new team to the principal, teachers, community leaders, and others. Emphasize everyone's commitment to continue serving the needs of children.
- Hand over records.** Pass along the procedure book and other pertinent records; make sure all passwords and account information (for banking, e-mail, etc.) change hands as well.
- Introduce the new team to the membership.** It's just as important for the new team to meet the membership as it is for them to meet contacts. Also encourage the incoming leaders to meet members outside of meetings and to have informal discussions with the board.
- Change contact information.** Update names, e-mail addresses, and the rest on your website, in official records, and in your membership database.

Planning the PTA Year

Overview

A plan, including goals and objectives, for the year should be written and shared with the PTA board and school principal. School staff should be included throughout the planning process.

Preplanning is very important to establish income and expenses for the year. The written plan of overall goals and specific objectives should be used by the finance committee in developing the budget. Planning also should include an evaluation mechanism for ongoing measurement of your PTA's progress and successes.

Revisit your goals throughout the year and check to see if you have attained them, or what has changed.



Goal Planning Step by Step

1. Determine the purpose of PTA in your school (remember to use the PTA mission as a guide: be a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child).
2. Review past and current activities of the PTA (did past activities meet the needs and goals of the association?).
3. List all available resources for the PTA (funding, membership, local assistance from other organizations and agencies, facilities, etc.).
4. Gather input from parents, teachers, and administrators on school and community needs through surveys and discussions.
5. List the types of activities for consideration.
6. Prioritize ideas and select the two or three that best meet the board's goals.
7. Develop a calendar for activities and assign committee responsibilities.
8. Evaluate the activities using measurable outcomes.



CHECKLIST

Objectives Checklist

Your plan objectives should follow S.M.A.R.T. guidelines (specific, measurable, attainable and agreeable, relevant, time frame).

Specific

- Is the main intent stated?
- Is the main intent specific?

Measurable

- Is the outcome measurable?
- Are you able to determine if the outcome can be achieved?

Attainable and agreeable

- Is the goal achievable during the time period established?
- Is the goal satisfying, or agreeable, for all people involved?
- Is the goal in line with the mission and purpose of PTA?

Relevant

- Is the main intent relevant to the objectives of the group?
- Is the goal applicable to the unit?

Time frame

- Is there a time frame within which the goal must be met?
- When will the goal be met?



Goal Planning Guide

Fill in the blanks and draft some ideas for your PTA’s year. Page 29 has a more formal “plan of work” template, but you may want to use this page to brainstorm first.

Objective	Plan for meeting this objective	Time frame
Encourage parents to be involved in the school.		
Inform parents about issues that affect student success.		
Participate in the state PTA convention or other state PTA-sponsored events.		
Increase membership by 5 percent.		



FAQ

Frequently Asked Questions About Planning and Goal Setting

What is a plan of work?

A plan of work lists the goals of your PTA and the expected means by which those goals will be reached. The plan of work guides the unit's activities for any given fiscal year. Committee chairs also prepare a plan of work (which must be approved by the executive committee or board) for their committees.

How is a plan of work put together?

Survey members on their perceptions of the school's most urgent needs. Once identified, these needs should be grouped and prioritized. The highest priorities should guide you in setting the PTA goals for the year. Establish ways the PTA can best help meet those needs, and estimate how much money your PTA will need to reach its goals; then identify sources of funds and create a budget.

On the following page is an example of a committee plan of work template recommended by Texas PTA.



LINKS

Planning Resources

Take the Planning and Goal Setting e-learning course at PTA.org/e-learning.

Plan of Work

Officer/Chair Name: _____
 (Nombre de Oficial/Presidente de Junta)

Position: _____ Year: _____
 (Posición) (Año)

Responsibilities/Duties: (Responsabilidades)		
Goal: (Meta)		
Specific Action Steps (Proceso Especifico de Acción)	Start Date (Fecha de Empiezo)	Completion Date (Fecha de Terminación)
Budget: (Presupuesto)		
Resources: (Recursos)		
Evaluation Process: (Proceso de Evaluación)		
Committee Members: (Miembros del Comité)		

Effective Meetings

Overview

PTA meetings should provide information, inspiration, and instruction for local members. General meetings are open to the community. The privileges of introducing motions and voting are limited to members. To ensure that you're covering everything in your meetings, take the PTA Basics course at PTA.org/e-learning.

For best results, schedule meetings that are convenient for your membership, stay on task, and start (and end) on time. If attendees feel something significant was accomplished, they will come back.

If you chair the meeting, you are the leader. First, confirm that the meeting was called for a specific purpose. Then, direct all conversation at the meeting to address this purpose.



STEP BY
STEP

Conducting Meetings

The role of the president during meetings is to organize and conduct the business of the unit by:

- Recognizing members to speak.
- Remaining neutral on questions and presentation of information. Take no part in any discussion while presiding. Call upon the vice president to preside if you wish to speak to a motion; the president then has all the privileges of a member. The president returns to the position of meeting chair only after the vote has been announced.
- Stating each motion clearly after it has been seconded before allowing discussion.
- Voting, but only when voting is by ballot. In all other cases, the president may not cast a vote unless it's to break a tie on an issue critical to the unit.
- Declaring the result of every vote taken.



CHECKLIST

Meeting Agenda Checklist

The PTA meeting agenda should include:

- Approval of the minutes, a written document recording the events of the previous meeting
- Report of officers, standing committees, and special committees (as needed, if written reports are not available)
- Special orders (mostly business that comes up once a year; nominations/elections)
- Unfinished business (motion that was under discussion and tabled at the last meeting)
- New business
- Announcements
- Adjournment



Frequently Asked Questions About Meetings

Do we have to meet? How often?

If you don't have a reason to meet, don't set up a meeting! However, be sure to check your bylaws for a minimum number of meetings that must be held.

What do I do if there is a heated debate?

Maintain your impartiality; a chair is like a judge in a court. Ensure that all participants have a fair opportunity to express their points of view. Then take control so that the meeting can continue to be productive.

What if someone is dominating the meeting?

Be assertive and use phrases such as, "I think we should hear from some other attendees," or, "Can we have some comments from the rest of the group on this?"

What if the meeting starts off well but gets stuck on a particular topic?

Take control and suggest another meeting to discuss the issue at a later date, or suggest that the concerned parties continue the discussion at the end of the meeting. Sometimes it will be necessary to call for a decision and then move on to the next topic.

What can I do to ensure that everyone is clear on what took place and what action is required?

Summarize the meeting; state concisely, and in an impartial way, what was said. End with a clear statement about what is expected to happen next.

What if I feel like I am being the "bad guy"?

Remember that it is your role and responsibility to be fair and efficient and to keep the meeting on target. At times, this requires that you be firm.



TOOLS

Meeting Agenda Example

Sample Agenda from a General PTA Meeting:

**ABC Middle School PTA
General PTA Business Meeting**

**September 6, 20__
7:00 p.m.–8:00 p.m.**

- I. Call Meeting to Order
- II. Reading and Approval of the Minutes
- III. Reports of Officers
 - Treasurer’s Report
 - President’s Report
 - Membership Report
 - Principal’s Report
- IV. Reports of Committees
 - Back-to-School Picnic Chairperson
 - Family Swim Night Chairperson
 - Fundraising Chairperson
 - Apparel Chairperson
- V. Unfinished Business
 - Dads and Donuts—We tabled this item at the last meeting. Discussion will be opened regarding whether to have a Dads and Donuts morning this school year. Approximate cost is \$200, unless we can get business sponsors to donate donuts, juice, and paper products.
- VI. New Business
 - Math Club (\$100 donation for supplies)—The Math Club would like to purchase six new calculators for an upcoming competition. The club has grown by 10 new students and they need more calculators for those students to compete.
 - Ink cartridge recycling program—Smith Recycling has a program to recycle empty printer ink cartridges. We can earn money and/or choose items from their catalog to benefit the school.
 - Mrs. Jones’ reading program—Reading Leaders is a new program that Mrs. Jones would like to introduce to her 2nd-grade class this school year. The supplies and books cost \$500. She will pilot the program, and if it’s successful, she hopes to include all 2nd-graders next year.
- VII. Announcements
 - September 15—Swim Night
 - September 18—Apparel Sales Begin
 - September 21—Fundraiser Kick-Off
 - October 2—Breakfast with the Principal
 - October 4—PTA Meeting
- VIII. Adjournment



TIP

Meeting Tips

Effective meetings require preparation, facilitation, inspiration, and results.

- *Preparation* means you come to the meeting ready to state the purpose and agenda.
- *Facilitation* means the leader (or chair) keeps the meeting on time and on track, allowing input from the group appropriately.
- *Inspiration* means you incorporate activities that engage participants and generate discussion, and you use visual aids to grab attention.
- *Results* mean that the meeting achieves one or more outcomes.

Share the results to keep participants connected to the work of your PTA.

Be sure to take the Conflict Management and Parliamentary Procedure courses available at PTA.org/e-learning.



GLOSSARY

Key Term: Minutes

The official record of a meeting is referred to as the minutes. According to the IRS, minutes need to be treated as a permanent file and kept forever. All officers should have copies of the minutes in their procedure books. The originals and a copy should be kept in a secure file at the school, if possible. Minutes **MUST** be in order to prove that action has been taken; for example, to prove that funds were expended in accordance with the bylaws and approved budget. A printed treasurer's report should be attached to the minutes. The minutes also should include a sign-in sheet to record attendance. Remember, if it is not in the minutes, it did not happen.



Sample Meeting Minutes

Minutes of
The ABC Middle School PTA
General Membership Meeting

September 2010

PTA President Richard Roe called the meeting to order at 7:00 p.m. A quorum was established with more than 60 PTA members in attendance.

PTA Treasurer Betsy Bow reviewed the budget. There was a motion to approve the budget. The budget was approved by the majority.

Membership Chair Lois Lane reviewed the results of the Back-to-School membership drive. She reported that 30 new members joined during the drive, many of whom were parents bringing their children to start their very first day of school.

President Roe called for volunteers to help plan and run the winter holiday fundraiser. He introduced June Jones, the chair of the winter fundraiser. June Jones said the theme for this year's fundraiser would be "Tech the Halls" and would have electronic and futuristic decorations and activities. Jones named the various tasks that were available for volunteering and explained the process for signing up to volunteer. She mentioned that the fundraising goal was \$5,000.

Reflections Committee Chair Donna Doe talked about the Reflections contest, explaining the theme and how to get involved.

Principal Sandi Silo thanked everyone for coming. The meeting adjourned at 7:45 p.m.

Prepared by,

Jane Doe
Recording Secretary

Parliamentary Procedure

Overview

Parliamentary procedure is a set of rules for conducting orderly meetings that accomplish goals fairly. Benefits of parliamentary procedure include the following:

- Justice and courtesy for all
- Maintenance of order
- Consideration of one item at a time
- Ability for each member to provide input
- Majority rule
- Maintenance of the rights of the minority



LINKS

Parliamentary Procedure Resources

- **Take the Parliamentary Procedure e-learning course at PTA.org/e-learning.**
- Visit the Robert's Rules of Order website, **robertsrules.com**.
- Keep a copy of *Robert's Rules of Order Newly Revised* (designated in the bylaws as the form of parliamentary procedure followed by PTA).

Bylaws and Standing Rules



DETAILS

Overview

Bylaws are the rules the local unit must follow. They are adopted and amended by a vote of your unit's members at a general meeting. PTA bylaws may not conflict with the bylaws of National PTA or the state PTA. If you can't find a copy of your unit's bylaws, contact the state PTA office to obtain one. All officers should be familiar with the local unit bylaws. Any member has a right to view them.

Bylaws provide the following important information:

- The structure of the local unit board
- Information on required meeting dates (may include how meeting notification is given)
- Requirements for a nominating committee
- How and when to conduct elections
- Dates for the fiscal year
- Requirements of a quorum for conducting business



CHECKLIST

Suggested Bylaws Checklist

- Article I—Name
- Article II—Purposes
- Article III—Basic Policies
- Article IV—Relationship with National PTA and [State] PTA
- Article V—Membership and Dues
- Article VI—Officers
- Article VII—Duties of Officers
- Article VIII—Board of [Directors/Managers]
- Article IX—Executive Committee
- Article X—Committees
- Article XI—General Membership Meetings
- Article XII—Council Membership
- Article XIII—[State] PTA Annual Meeting
- Article XIV—Fiscal Year (if required by state PTA)
- Article XV—Parliamentary Authority
- Article XVI—Amendments



LINKS

Bylaws Resources

You can review the wording of bylaws and standing rules from other local units by:

- Asking for examples from your state PTA
- Taking the Parliamentary Procedure e-learning course at PTA.org/e-learning
- Searching online using the keywords “PTA bylaws” or “PTA standing rules” to see bylaws that other local PTAs have put on their websites



GLOSSARY

Key Term: Standing Rules

Standing rules outline the procedures of the association with specific details that are not included in the bylaws and that must not conflict with the bylaws. Some examples of the differences are:

- Bylaws state when the meetings of the association and executive board are held, and perhaps how many meetings are required per year. Standing rules tell where and what time these meetings are held.
- Bylaws give the primary responsibilities of officers and chairs. Standing rules give the specifics.
- If the bylaws state that the first vice president is responsible for a program, the standing rules would list the various chairs who work with the vice president under the first vice president’s title.

Standing rules are the details of PTA work. They may be changed from administration to administration or from meeting to meeting.



FAQ

Frequently Asked Questions About Bylaws

How are changes made to the bylaws?

To consider changes to the bylaws, a small committee should be appointed to study the proposed changes and to make recommendations to the board for their approval. Then, 30-days’ notice of the proposed changes must be given to all members. A bylaws change requires a two-thirds majority vote of the members present at the general meeting if 30-days’ notice of the change was not given, and a majority vote if 30-days’ notice was given.

Who should have copies of the bylaws?

The entire board should have a copy of your current bylaws. Upon request, copies should be made available to all members.

What is a quorum, and how do I know what our unit’s quorum is?

The quorum is the minimum number of members who must be present to conduct business at a PTA or board meeting. The number for your unit is set by your bylaws. If a quorum is not met at a meeting, then a vote cannot be taken.

Finance

Managing PTA Money

Managing the finances of a PTA is crucial to everything else you do. Not only is it essential for reasons relating to the funding of programs or events, but there are federal requirements that all not-for-profit organizations must follow, or else risk losing their tax-exempt status. Abiding by federal guidelines is extremely important to maintain tax-exempt status and ensure that your PTA is financially sound. Seek out qualified persons who would like to volunteer in this role of managing money.

As the local president, there are two major areas you need to oversee:

- Creating and managing a budget according to bylaws
- Filing IRS, federal, state, and local reports appropriately

Ultimately, you are the leader and you are responsible for making sure that the treasurer conducts himself or herself in accordance with PTA bylaws.



CHECKLIST

Financial Management Checklist

As PTA president, you must make sure your treasurer:

- Files a new signature card with the bank immediately (a transition letter from the outgoing treasurer to the bank may be necessary to enact the change)
- Knows the PTA's bank balance
- Has reviewed the books before accepting them from the outgoing treasurer
- Has a budget approved by general membership before spending funds
- Gives a written financial report at all PTA meetings (board and general membership)
- Has the unit's federal Employer Identification Number (EIN)
- Requires two signatures on all checks
- Pays, as authorized, all expenses by check (never cash), and never uses signed blank checks
- Gets receipts for every expense and requires receipts for reimbursement of expenses
- Writes a receipt when receiving money
- Has a procedure for counting money (e.g., from a fundraiser) that includes two people and a signed receipt documenting the amount
- Deposits all funds in a timely fashion into an authorized PTA bank account (never into a personal account, into a school building account, or into the account of another organization)
- Keeps all financial records, including receipts and invoices, on file
- Keeps all copies of minutes with references to expenditures of funds
- Reconciles monthly bank statements immediately upon receiving them
- Uses the correct remittance forms to send national and state PTA membership dues by the remittance deadline
- Has books and records reviewed annually



TIP

Financial Management Tip

For the position of treasurer, seek a volunteer from the community who is a CPA, a bookkeeper, a tax preparer, or a mathematics tutor. Provide him or her with any software package or spreadsheets that the outgoing treasurer used in the previous year and an accounting of recent transactions that may not yet have cleared the bank.

For detailed information about the financial management of your PTA, please refer to the *PTA Money Matters Quick-Reference Guide* at PTA.org/MoneyQRG.

Membership

Overview

PTA is a membership organization. We rely on our members to contribute their time and skills to school communities from coast to coast and overseas, where U.S. military families are stationed.

Every individual who joins PTA is giving something not only to his or her child but also to every child. Imagine how strong your community could be if every parent, community member, and business leader got involved in PTA!

Attracting new members and retaining existing members are among the most important duties of a PTA board. A strong membership is essential for PTA to be a force in decisions involving the welfare and education of children. Your active leadership will help create strong programs in your school community and strong commitment among your members.



TIP

Tracking Member Data

As PTA president, you must make sure your membership chair:

- Creates and maintains a membership database. This is a crucial tool for your membership recruitment and retention efforts. It will help you keep track of members, dues payments, and mailings/e-mails.
- Uses e-mail. E-mail allows you to communicate with members who are not able to attend meetings. Collect e-mail addresses on your membership form. As new member benefits become available, National PTA will e-mail unit presidents. These messages will be written in a newsletter format that you can use in your PTA newsletter or forward to your membership via e-mail. Occasionally, PTA member benefit e-mails will be sent directly to PTA members.
- Sign your PTA up for Just Between Friends (JustBetweenFriends.com/PTAquickstart) to easily manage your members, communicate with your entire school, create directories, and manage volunteers.

Just Between Friends

Just Between Friends is the PTA management and communications system. It's offered free to local PTAs to strengthen your PTA and simplify the lives of leaders and members. Use Just Between Friends for member management (including membership card printing), communications (e-mails with attachments and automatic reminders), print and online directories, and volunteer management (a module that includes participant management suitable for PTA Reflections and Three For Me). Learn more at LearnJBF.com. Sign your unit up at JustBetweenFriends.com/PTAquickstart.



LINKS

Membership Resources

- Check out Just Between Friends for local unit leaders at **LearnJBF.com**.
- Membership cards are available through state PTA offices.
- Use the Membership Marketing Templates and Tools available online at **PTA.org/marketing**. These are ready-to-print posters, fliers, and ads for you to customize for your PTA! There's also a Membership Recruitment and Retention Manual.
- Discuss best practices with the PTA Membership group in the PTA Great Idea Bank, at **PTAgreatideabank.org**.
- Find programs and resources to promote the involvement of dads and other male role models through the PTA MORE (Men Organized to Raise Engagement) alliance. Go to **PTA.org/MORE**.
- Inform your members about special offers from PTA National Member Benefits Providers. Details can be found at **PTA.org/Benefits**.

To learn more about recruiting and retaining members, refer to the *PTA Membership Quick-Reference Guide* at PTA.org/MembershipQRG.

Volunteer Management

Valuing Your Volunteers

Establish and maintain a good relationship with all volunteers. Some volunteers may participate on a regular basis, some for short periods of time, and some only for special events, but *all* of them are vital to the success of your PTA! *If you want their help, make sure they know that they are welcome and valued.*



CHECKLIST

Volunteer Chair Checklist

Assign a volunteer chairperson to oversee volunteer management and to work in partnership with your membership chair. A volunteer chair does the following:

- Contacts every person who offers to volunteer
- Surveys potential volunteers to determine their skills and areas of interest
- Arranges for general orientation of all volunteers, as well as volunteer workshops or training sessions
- Helps volunteers become familiar with school policies, people, programs, and the school building itself
- Explains the volunteer program to teachers, and surveys teachers to determine their needs for volunteer help
- Matches the needs of teachers with the interests and abilities of volunteers in making assignments
- Provides a variety of experiences for volunteers
- Tracks what projects volunteers worked on and time spent
- Keeps volunteer files current and in order

Volunteer Tips

- Volunteers are diverse, and so are the factors that motivate them; find out what they want to accomplish and experience through volunteering.
- Volunteers need encouragement.
- Volunteers need to be treated with respect.
- Volunteers need to feel wanted and needed.
- Volunteers need help and direction.
- Volunteers need praise.
- Volunteers need meaningful assignments.
- Volunteers need recognition and appreciation for their efforts.
- Visit the PTA store at totalpromote.com/pta for recognition gifts.
- Make sure volunteers are contacted throughout the year.
- Respect volunteers' time and give them as much notice as possible as to when you will need them.



STEP BY
STEP

A Successful Volunteer Program Step by Step

- 1. Assess the need for volunteers at school.** Volunteer coordinators should:
 - Discuss the merits of volunteers and address concerns among school staff, teachers, and volunteers.
 - Survey/interview teachers, principals, and other school staff to determine all areas where volunteers could work.
 - Survey parents to learn about their talents, interests, and skills.
- 2. Work with principals, teachers, and school staff on effectively using and supervising volunteers.** The principal can serve as the overall supervisor of a school's volunteer program. PTAs can encourage principals to do the following:
 - Inform school staff about the mission of the volunteer program and enlist support.
 - Make some space available to volunteers to use, such as a workroom or even a desk. This is to show that volunteers are a part of the school and can keep their materials handy.
 - Hold meetings with volunteers and school staff to create team spirit.
 - Assist in providing training to staff regarding working with volunteers.
- 3. Set goals and objectives for volunteer assignments.** To ensure a successful volunteer program and long-term involvement, it is important that assignments be selected carefully and be productive, meaningful, and closely matched to volunteers' interests, skills, and motivation for volunteering. No one wants to waste their time or energy.

- 4. Recruit volunteers.** Recruitment should take place throughout the year to replace volunteers and enlist assistance for new programs.
 - Schools might overlook the large population of adults who work second and third shifts, weekends, or flexible schedules. Fit people in on their time! What projects can be completed at home?
 - Senior citizens are a highly talented pool of knowledgeable adults with unlimited skills that can be adapted easily to school curriculum and programs. Ask senior groups about volunteering, and invite them to join your PTA.
- 5. Train and orient volunteers.** Orientation and training should be welcoming, relevant, hands-on, and geared toward the specific skills and responsibilities of each volunteer. Appropriate teachers or school staff should give input into or be part of the training session.
- 6. Recognize volunteers.** To create and sustain a feeling of belonging and satisfaction among volunteers:
 - Provide ongoing training to develop new skills.
 - Treat volunteers like colleagues.
 - Recognize volunteers for their work.
- 7. Evaluate volunteer performance and program success.** Use surveys, general observations, and interviews to assess whether the volunteer program goals are being met.

More About PTA Volunteers



FAQ

Frequently Asked Questions About PTA Volunteers

Who can be a volunteer?

Anyone who supports the mission and goals of PTA.

It is strongly suggested that all volunteers be cleared through a background check for the safety and security of all students. If your volunteer program is coordinated at the district level, work with the personnel department to establish procedures and release forms for clearing volunteers, especially if they will interact with children.

How can we recruit volunteers?

Be creative in arranging your recruitment meetings. At these meetings, volunteer coordinators can talk about the importance of, as well as the need for, involvement in the school. Consider holding recruitment meetings:

- At local work sites
- At senior centers or retirement communities
- In community rooms at apartment complexes
- At the student union building of a local college
- At the retired teachers association meeting
- At fraternal organizations, civic groups, and women's clubs
- At a chamber of commerce luncheon
- In a high school class, club, or organization

Are volunteers protected from liability?

Yes, to an extent. Because the federal government realizes the importance of and need for volunteers, it passed the Volunteer Protection Act of 1997. Under the law, volunteers (but not the organizations they serve) cannot be held liable for negligent acts or omissions that occur during the course of their duties. However, if someone was injured because of a volunteer's willful and wanton misconduct, including the influence of drugs or alcohol, this protection would not apply.

Programs

Overview

National PTA offers programs to increase family engagement and support the educational success, health, and well-being of all children. Tools and resources, as well as best practices, are available to support you and your PTA in implementing the programs.

What Local PTAs Can Do

Local PTAs play a critical role in developing programs and practices that directly impact family and community involvement, and thus student success.

Programs and practices should be planned in response to a need or priorities of the school community. Each program or action should be appropriate for the audience and take into account the diverse needs of families related to accessibility, scheduling, languages, cultures, and family structures.

The programs must be relevant, have clearly defined goals, and, when appropriate, be sustainable over time.

To pull all this together, your PTA needs to have a team that will focus on the creation and implementation of programs.

Program Resources



TOOLS

PTA: Your Source for Program Ideas

The great thing about PTA is that you don't have to reinvent the wheel. You have so many resources and so much support available. Visit **PTA.org** and your state PTA website. Read articles from PTA's *Our Children* magazine. Call your council and network with PTAs in your area. Attend PTA conventions and leadership conferences.

National PTA Programs

Parent Involvement and Family Engagement

- Family-School Partnerships
- PTA Take Your Family to School Week
- PTA Teacher Appreciation Week

Child Health and Nutrition

- PTA Healthy Lifestyles
- Let's Fight Flu Together!

Student Success and Engagement

- PTA Reflections (an arts competition)

For more information on planning programs, refer to the *PTA Programs Quick-Reference Guide* at PTA.org/ProgramsQRG.

National PTA Awards and Grants

Local PTAs in good standing are encouraged to apply for awards and grants from National PTA, many of which offer PTAs funding. The awards and grants offered include:

- Phoebe Apperson Hearst Family-School Partnership Awards
- PTA Take Your Family to School Week Awards (\$1897 Awards)
- PTA Healthy Lifestyles Grants
- Mary Lou Anderson Reflections Arts Enhancement Grants
- PTA Outstanding Advocacy Award
- Shirley Igo Advocate of the Year Award

PTAs can also purchase the National PTA Life Achievement Award, PTA's highest honor, to present to individuals who daily live out their commitment to children.

More details on these awards can be found in the *PTA Programs Quick-Reference Guide*; you can also find application information online at PTA.org/nationalawards, and, for the advocacy awards, PTA.org/LegCon.

Recommendations for Program Success



TIP

Program Planning Tips

In program planning, your PTA's relationships with school staff, families, and community stakeholders are essential. Work together to make programs meaningful and effective.

FIND OUT about each partner's interests and needs.

REACH OUT to these partners on their own turf with specific offers of assistance.

SPELL OUT the purpose and terms of joint efforts, including what will be done by whom.

WORK OUT the kinks as they arise and change your approach when necessary.

BUILD OUT from success by sharing positive results and encouraging expanded efforts.



TIP

Family Engagement Tips

A family engagement program can serve as a forum for discussion and a conduit for change. It's important to keep in mind the following points:

- All parents want what is best for their children. Do not assume that a child's parent "just doesn't care" because you don't see him or her at school. Find ways to include all families in your programs.
- There is no "one size fits all" answer to partnerships. Identify the strengths, interests, and needs of families, students, and school staff, and work from there. Set clear and measurable goals based on family and community input.
- Use a variety of communication mechanisms to inform families, businesses, and the community about family involvement policies and programs. These mechanisms can include phone calls, e-mail, newsletters, fliers, public service announcements in local newspapers and on cable TV, websites, social media, and public forums.
- Provide a varied menu of opportunities for participation geared to the diverse needs of families, including working families. Schedule programs and activities flexibly. Recognize that effective family involvement takes many forms that may not necessarily require parents' presence at a workshop, meeting, or school.
- Ensure that families and students have complete information about the standards students are expected to meet, examples of student work that meets these standards, and understanding of how students will be assessed. For example, hold curriculum nights to feature the standards and exhibit student work. Provide workshops on state testing.
- Ensure that families and students have access to information about nutrition and health care, after-school programs, and community service agencies.

- Recognize how a community's historic, ethnic, linguistic, and cultural resources can generate interest in family and community participation.
- Arrange opportunities for families to discuss their children's progress, raise concerns, and work as partners with school staff to solve problems that arise.
- Make sure that family members acting as volunteers in the school have opportunities to help teachers in meaningful ways, such as assisting with instructional tasks and administrative functions. In addition to being tutors and classroom aides, family members might speak to students about their careers, explain customs from their cultural traditions, or demonstrate special skills of theirs.
- Involve families in evaluating the effectiveness of family engagement programs on a regular basis and use this information to strengthen the programs.



STEP BY
STEP

Program Planning Step by Step

Work with the PTA programs chair to develop and implement programs that will meet your PTA goals and address school and community needs.

- 1. Identify needs and select a program.** Contact parents, teachers, and school leaders and ask what needs the PTA could address through a program. Report your findings at a PTA meeting and discuss your options. By the end of the meeting, decide what direction your PTA should take, as well as what issues interest PTA members most.
- 2. Plan the program.** Determine the scope and goals of the project; prepare the plan of work, timeline, and budget. Consider working with other groups or organizations to expand the project's impact.
- 3. Raise funds.** Traditional fundraisers (such as auctions, contests, dinners, festivals, and lectures) can often provide enough funding for a program, although not all programs should require a fundraiser. Depending on the amount of support required, you also may choose to directly contact businesses and individuals and ask them to donate funds, supplies, or services. Also consider contacting local foundations that support your cause.
- 4. Promote the program.** Send out notices to local media about your program and let the public know what you are doing at your school. Consider asking for donations of radio air time, newspaper ads, printing, billboard postings, etc., as needed.
- 5. Deliver the program.** Remember to make your program accessible to the needs of your diverse school community.
- 6. Evaluate your success.** After your project is complete, conduct a simple evaluation. Ask everyone involved (including volunteers and the program audience) about their experiences. Try to get specifics: What changed for the better, by how much, and how many people were involved? Share your accomplishments with all who worked on or donated to the project.

For more details on implementing PTA programs, refer to the *PTA Programs Quick-Reference Guide* at PTA.org/ProgramsQRG.

Advocacy

Advocating for the Education, Health, and Well-Being of All Children

PTA defines advocacy as supporting and speaking up for children—in schools, in communities, and before government bodies and other organizations that make decisions affecting children. Child advocates work with policy makers at the federal, state, and local levels to ensure sound policies that promote the interests of all children. For more than a century, PTA has provided families and child advocates with the support, information, and resources needed to focus on the health and education of America's youth.

Advocating for Federal Policy

As the oldest and largest volunteer child advocacy association in the United States, PTA has had an indelible impact on the lives of millions of children and families. PTA's legacy includes the creation of universal kindergarten classes, child labor laws, school lunch programs, a juvenile justice system, and local school wellness policies. Each year, National PTA develops a federal public policy agenda that sets forth the association's recommendations on key legislations and policies up for consideration by Congress and the administration. These priorities are selected based on:

- Timeliness of issue (is it being considered before Congress and the administration)
- Opportunities for PTA to provide leadership and expertise
- Alignment with PTA's mission and resolutions
- Ability to achieve a meaningful policy change that will produce positive results for children and their families

Federal Legislative Chairs

Each state PTA appoints or elects a federal legislative chair (FLC) to serve as the federal policy expert for their state. FLCs are essential to PTA's advocacy efforts, serving as liaisons between National PTA and state PTAs on federal policy matters. FLCs are responsible for communicating PTA's federal public policy priorities to PTA members in their states, identifying and mobilizing PTA members to advocate on behalf of PTA, and building their states' advocacy capacity by providing training and opportunities for federal advocacy. Along with state and local PTA presidents, FLCs build and maintain relationships with federal policy makers.

Here are some examples of how local PTA leaders can influence federal level policy:

- Encouraging PTA members to sign up for the PTA Takes Action Network and respond to action alerts
- Participating in calls with members of Congress and the staff of members of Congress to advocate for PTA's federal public policy priorities
- Hosting a training on federal policy, utilizing the FLC as a resource

Advocating for State Policy

State laws can have a major impact on the health and education of our children. Involving PTA members in state and local advocacy is an important part of securing adequate state laws, funding, and policy for the care and protection of our children.

Here are several examples of how local leaders can influence state and local policy:

- Working with state legislators to influence legislation
- Serving on school boards or attending school board meetings
- Volunteering on Parental Information and Resource Center (PIRC) boards to help guide and build relationships between PIRCs and state PTAs
- Attending school district meetings on such topics as healthy alternatives in the lunchroom and state and local budget cuts
- Working with school leaders and state education officials to implement PTA's National Standards for Family-School Partnerships (PTA.org/Standards)
- Writing a letter to the editor about the importance of family engagement in education

Advocacy Resources

PTA has developed a wealth of resources to help you make a difference in the lives of children. The following—and more—can be found at PTA.org/advocacy.

- PTA Public Policy Agenda—This resource presents National PTA's federal public policy priorities and its recommendations on key legislation and policies up for consideration by Congress and the administration.
- PTA Takes Action Network—Become part of this network to receive:
 - *Federal Policy Updates*—A monthly e-newsletter that keeps you informed on federal legislation affecting families, schools, and communities.
 - *Action Alerts*—Advocacy alerts that connect you to your members of Congress and highlight actions you can take to influence important legislation.
- Online Advocacy Toolkit—This toolkit offers how-to's for building relationships with members of Congress, working with the media, and understanding the legislative process.
- *State Laws on Family Engagement in Education*—This reference guide is intended to help families better advocate for their children at the school and district level, to guide development of legislative reform initiatives by policy makers and advocates, and to support efforts to monitor the implementation of laws already in place.
- Common Core State Standards Initiative (CCSSI)—CCSSI is a voluntary, state-led effort to develop clear, consistent academic standards in English language arts and mathematics. National PTA offers resources to support the adoption of common core state standards.

Advice from Past Presidents

Words of Wisdom

On Getting Your Year Started...

Leadership transition is an important part of beginning (and ending) every school year. The outgoing executive team and committee chairs should share ideas for the future, turn over all important documents, and make any necessary introductions in the school and community. Check your bylaws to determine exactly when each officer assumes his or her duties.

On Planning and Goal Setting...

The old adage “fail to plan, plan to fail” is true! Make sure everybody understands what they are supposed to be doing and when they are supposed to be doing it. Always have a backup plan to respond to unforeseen situations. Take small steps toward reaching big goals, and remember to have fun!

On Effective Meetings...

Ask one or two of your officers or committee chairs to stand at the door to greet every person who attends your meeting. Give everyone a copy of the agenda and direct them to refreshments (always a good idea!) and a seat. Thank them for coming! Give a printed explanation to everyone attending of how to make a motion. Start and end the meeting on time.

On Bylaws...

Be sure to review your PTA’s bylaws annually, with an update to the most current edition of standard bylaws (those required or recommended by your state PTA) at least every two years. When in doubt, contact your state PTA for assistance!

On Finance (Budgeting and Fundraising)...

You must understand your PTA’s finances from the perspective of the past, the present, and the future. You need to know what happened the year before you got there, what your plan is for the current year, and how you plan to transition your finance responsibilities to the next incoming president in an orderly way.

On Membership...

The best way to boost membership is to let potential members know WIIFM (What’s In It For Me?).

So, WIIFM? Student success through family involvement. You can bet that families want their children to succeed. PTA is the best way to ensure this success. PTAs also have access to member benefits, such as e-learning courses, informative e-newsletters, special discounts and offers from national and local member benefits providers, and more.

Remember that membership is everyone’s business!

On Volunteer Management...

Treat volunteers with respect and consideration—they are not paid for their work; they are donating their time and talents because they want to help children succeed. You also must be very flexible. Understand your school community. If your PTA serves a lot of single families, you may have to divide responsibilities among several people. You may even have to consider changing your bylaws to create “co-” positions for committee chairs to split up the workload. Bottom line—thank ALL of your volunteers every chance that you get!

On Programs...

Make sure the PTA programs you run are the programs your school community actually needs! Also, strive to produce events and programs in which you partner with local businesses or organizations, recruiting past event attendees as volunteers.

On Advocacy...

What’s one of the most widely read portions of the newspaper? Letters to the Editor. Get in there!

Just like a chorus singing a song in harmony, your PTA can unite with other advocates and give a strong, clear message about issues that affect children and families. Write in to tell everyone how PTA teaches, inspires, and strengthens your school and the parents of your community.

Awaken the public to advocacy efforts and you can achieve new and exciting advances for children!

On Diversity and Inclusiveness...

We are building an organization that is diverse in terms of race, culture, age, and socioeconomic status—a mix of all people. We’re more powerful this way—no one can write us off as just poor, or just liberal, or just out for narrow self-interest. We’re trying to offer a model of how society should look now and for future generations. Look at the people who make up your school community. Your PTA membership and board should reflect your community.

On Delegating...

When you delegate a task:

- Ensure that the person to whom you are assigning the task has all of the needed information to act upon that task.
- Expect responsibility to be taken gradually, with a few glitches along the way.
- Build the person’s confidence to carry out the job. Offer constructive advice and give positive reinforcement, but don’t take over.

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National
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