

section
3

RESOURCE GUIDE

New York State
PTA[®]
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PTA board

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the PTA board

**“Each of you is the PTA-
it will be as powerful and
strong as you make it.”**

*Elaine Steinkemeyer,
First Vice President, National PTA
(1982)*

The foundation of PTA is its members. They have paid dues in support of the Purposes of the association. They have rights as members to inclusion, participation in decision-making and active involvement. The role of the PTA board is to establish the framework within which everyone works. The board is a team of volunteers who are members of the PTA and who are elected to office or appointed to chairmanships to work together to set goals for the local unit, council or region PTA and to establish methods of operation in order to achieve those goals. Effective teamwork requires mutual respect, knowledge of the demands of the roles of others, compassion and commitment.



To understand the structure and governance of a PTA unit or council, remember the “**ABCs of PTA**”:

A The “**Association**” refers to all of the members of the PTA unit or council. Members should always be informed about important issues. Members elect the nominating committee and the officers, vote to adopt the budget, vote to adopt the bylaws every three years, and should always vote on recommendations requiring action of the unit or council.

B The executive **board** consists of the elected officers, plus the immediate past president, standing committee chairmen, council delegates and the administrator – whoever is listed in your bylaws. The executive board creates committees, fills vacancies, adopts procedures, approves plans of action of committees and chairmen and reports to the members. Executive board members have fiduciary responsibilities to the association.

C The executive committee consists of the elected officers as listed in your bylaws. They help the president see that the goals of the unit or council are carried out. The executive committee appoints standing committee chairmen with the president, makes recommendations to the executive board, and is responsible to the members who have elected them. Members of the executive committee should learn their responsibilities as quickly as possible after their election to ensure an easy transition.

volunteer service on a PTA board offers many rewards:

- Opportunities for improving the quality of life and education for today’s children and youth.
- Opportunities for study and mental stimulation on matters of importance.
- Opportunities for friendships.
- Opportunities for involvement.
- Opportunities for leadership training.

TIP:

Duplicate this section for all members of your PTA executive board!

**The PTA
board guides
the association
to establish
and achieve
goals for the
year.**

the PTA board, con't.

what is a board?

The role of the board is to establish policies that will guide the association so that it runs effectively, efficiently, legally and ethically. PTA, as a not-for-profit organization, is responsible for serving two audiences: the members and the public. One school of thought says that because of the part-time uncompensated nature of our positions in PTA we should be held to a less stringent standard than leaders of for-profit companies. Another view, however, is that an even stricter standard exists because we represent a public rather than a private trust. Our responsibility is to our members. **Our “bottom line” is children.**

The board is responsible for developing a strategic plan (**goals**) to implement the Purposes and Mission of the PTA. All decisions of the board and all actions of committees should be linked to implementing the plan.

Every unit and council needs a financial plan (**budget**) that is tied to the strategic plan; the financial plan does not drive the strategic plan. The strategic plan provides the direction and sets priorities, and the financial plan simply states how resources are to be secured and allocated to achieve the goals for the year.

Successful boards are characterized by strong participation by all board members – not dominated by a few. Every member must carry his or her share of the leadership responsibility. Successful PTAs have governance by a board that operates as a high-performing team with these qualities:

- Everyone knows the goal and his or her role.

- Everyone commits to providing honest feedback.
- Each person on the team respects and values diversity of thought.
- The team develops trust and the ability to disagree without being disagreeable.
- Everyone is willing to pitch in to help.
- Team members can solve problems as a team.
- The team gets results.
- The team spreads the credit and celebrates successes and achievements.
- Participation on a PTA board is an honor and duty not to be taken lightly. By fulfilling responsibilities as stewards of the organization, the purposes and mission of the PTA can be reached and all children will benefit.

the PTA meeting

Much of the learning, planning and doing in this world happens in group meetings. Human beings are social creatures – people come together in groups to talk things over, to broaden individual perspectives and to develop a common purpose. Boards can work well when there is a balance between a sense of solidarity and a focus on the task at hand.

Board effectiveness is a mix of intelligence, creativity and practicality. Since these qualities will probably be held by different members, it is interaction that makes the sum greater than the parts.

PTA meetings:

- Are the place where the board revises, updates and adds to what it knows as a group.

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PTA board, con't.

- Build trust among members.
- Allow members to share individual perspectives.
- Help every individual understand both the collective aim of the organization and the way in which his or her own and everyone else's work contribute to the group's success.
- Create common understanding and common purpose.
- Are a method for coordinating people and activities.
- Provide an opportunity to allocate resources.
- Members make significant contributions to meetings by:
 - Reading any background materials provided prior to the meeting.
 - Arriving on time.
 - Not carrying on side conversations.
 - Being open to the ideas of others.
 - Suspending judgment until facts are known and basing decisions upon objective data.
 - Speaking up. Remaining silent or withholding differing opinions is not helpful to the group in thinking through problems.
 - Being careful not to make irresponsible statements, repeat confidential information or stir up feelings which are antagonistic to good group work.
 - Helping others stay on subject.
 - Taking action on any personal responsibility you have as a result of the meeting.

communication skills

key points

- Listen carefully ~ each speaker deserves your full attention
- Be courteous & treat all members as you'd like to be treated
- Respect opinions ~ Everyone has the right to express an opinion
- Consider suggestions ~ Don't become defensive when other ideas conflict with your own
- Express yourself clearly ~ Use good pronunciation, enunciation, proper volume and face the group
- Summarize as needed
- Include everyone ~ Make all group members feel you are speaking to each of them
- Offer suggestions ~ Do so in a positive manner at an appropriate time

as a leader you should

- Express yourself honestly
- Learn good listening skills ~ Don't interrupt
- Ask clear and to the point questions
- Paraphrase what you've heard at regular intervals
- Respond to other's statements ~ Be specific with your replies and be tactful & positive if possible
- If it's necessary to reply in a negative way, address the issue and not the person
- Be assertive ~ honest ~ direct ~ respectful



responsibilities of a PTA board member

Serving as a board member is a privilege accompanied by many responsibilities. A board member enjoys prestige and status from the position. However, this enhanced status carries with it the expectation that the member will improve in leadership skills, will keep up with current information, and invest time in the affairs of the PTA.

As a board member, you are in the public eye. You represent PTA and must be responsible for what the position requires. Be discreet and tactful. Use your best judgment. Be open to new ideas. Study, research and plan.

All members uphold decisions made by a board. No matter which way the decision went or what side you voted on, after the decision has been made, have a positive attitude and do your best to make it happen.

board members should:

ACCEPT a position only if able to devote sufficient time and energy to do the job thoroughly, can attend board meetings regularly, and can keep abreast of PTA affairs in order to contribute intelligently to board discussions.

PARTICIPATE constructively at meetings by being on time, coming prepared with materials and ideas, staying on the topic and by helping others to participate fully.

RECOGNIZE that you have a responsibility to read all publications and other correspondence sent to you.

KNOW and **ADHERE** to PTA philosophy, principles and policies.

STUDY the structure of the PTA organization – National, state, region, council and local unit; know the relationships among them. Know the principles of the committee structure and effective committee work.

BECOME WELL-INFORMED in all areas of PTA programs; learn where to find information. If you are unsure, ask. Use PTA resources. Pass on only complete and accurate information.

BE FAMILIAR WITH the state and national publications. Your enthusiasm will encourage others to use them.

MEET DEADLINES by submitting reports and materials on time and fulfilling assignments promptly.

FOLLOW state and national procedures. Unless board members follow procedures and go through channels, confusion results.

SEND REPORTS of expenses you incur doing PTA work on the proper forms, with receipts and within the stipulated time frame. Stay within your budget unless you get permission to do otherwise.

SYNCHRONIZE ACTIVITIES by working within the group, correlating your activities with those of other board members.

DEVELOP AND STRENGTHEN leadership in those who work with you.

TAKE INITIATIVE AND RESPONSIBILITY for your own work. Do not wait for someone to remind you to fulfill your commitments.

KEEP RECORDS AND NOTES concerning the work you do; keep this material in a notebook to pass on to the next person who takes over your job. Offer to have a meeting with your successor, then relinquish the job. Remain available for assistance upon request.

LEARN TO DELEGATE work to appropriate people instead of doing it all by yourself. This requires the ability to encourage and inspire others. You will generally be most successful in delegation if you ask someone in person to do some well-defined task, providing them with an honest estimate of how much work it will take, with a clearly defined deadline.

WELCOME BEGINNERS' QUESTIONS. Help new board members gain self-confidence so that they can feel secure in their new situation.

UNDERSTAND THE VALUE of attending conferences and training. Help others to understand this and to participate. Travel and accommodations for conferences and training, especially region PTA conferences and workshops and state PTA and National PTA conventions, are valid expenses and encouraged budget items.

HELP THOSE YOU COUNSEL to understand policy as enabling and protective, rather than limiting and restrictive. Look to state and national leaders for guidance and interpretation of policy.

board decision-making

How an issue is presented to the decision-making group is very important. In many instances, committees will work through an issue and present their findings and suggestions to the board for discussion and decision. In other cases, an issue will go directly to the board. In bringing an issue directly to the board for discussion, ask yourself:

- Is this an appropriate issue for the board to consider?
- Is there an opportunity that the association can use?
- Is there a problem?
- If so, what is the problem or situation?
- Whose problem is it? Can those who experience the problem be involved in its solution?
- Can this group deal with this problem at this meeting?
- Has sufficient background work been done to allow for a high quality discussion? What additional information is needed?
- If this issue is urgent, how can the situation be explained completely, yet concisely?

Boards discuss and define the problem or issue. The presiding officer asks the group to define the elements of a good solution, and then invites the group to brainstorm solutions without evaluating the suggestions. How a group arrives at a solution will depend on the size of the group and the sensitivity of the issue. The most common method of choosing is to vote. Striving for consensus will take longer, but this highly interactive process will gain the most support for the decision.

Consensus may be defined as unanimity of agreement on a set of collective values or course of action



for a group. Striving for consensus should not be such an overriding goal that it leads to organizational paralysis or produces watered-down, less desirable decisions. In a group process, conflict is inevitable, and, if kept within bounds, even desirable. Conflict management and consensus building are, of necessity, a collaborative effort of the board.

The following are points that facilitate consensus:

- The orientation and training of new board members, ensuring that new members understand the association.
- The presiding officer should know what issues will be discussed, and sees himself or herself as the facilitator of the consensus building process.
- An agenda and sufficient information about options should be provided prior to the meeting.
- The decision-making process is appropriate and clear.
- All members of the group should have a fair opportunity

to influence the decision, but don't beat an issue to death.

- Be ready to make a decision if all viewpoints have been heard and sufficient information has been shared.
- Conversely, if the group is strongly divided and the issue is not pressing, deferring decisions for further study and reflection is sometimes appropriate.
- Keep up the pace of the discussion. Try to crystallize statements into phrases which can be recorded quickly.

Look upon **dissent** as a means of creating understanding and mutual respect. The trust necessary to build an effective board is built by allowing dissent to be expressed.

- Assume that each person is right. Each person sees the situation from a different perspective.
- Welcome dissent as an opportunity to identify trivialities.
- Sometimes, when conflicts are expressed, they are seen as trivial and the board can move on.

board decision making, con't.

- Let dissenters know they have been heard.
- Keep identifying commonalities. Look for compromise.
- If a decision is made with which one or more members disagrees, you may wish to note their disagreement in the minutes.

handling meeting conflict

- Because meetings depend on interaction between people with different values, perspectives and communication styles, it is almost inevitable that conflict will occur from time to time. The impact of conflict on a group depends on what the conflict is about, how it is initiated and how it is managed.
- When someone raises a seemingly negative point of view, he or she at least gives others a chance to address the issue. When they cannot express differences, people may enter into covert forms of conflict that aren't readily apparent. Encourage discussion. Uncontrolled conflict, however, can lead to hurt feelings, withdrawal and the destruction of the group. Board members should:
 - Ensure that disagreement is expressed sensitively.
 - Disagree with the idea; don't criticize the individual.
 - Respond to disagreement with a spirit of inquiry. Ask for clarification or examples.
 - Point out the similarities between individual perspectives.
 - Keep in mind that if the board is deeply divided on an issue, the decision-making should be postponed and a task force, including all factions, should be formed to work on a proposal.

fiduciary duties of not-for-profit boards

PTA board members have a fiduciary responsibility to the association, to act in its best interest at all times. Fiduciary is defined as “designating a person who holds something in trust for another” and “valuable because of trust”. These duties are:

duties of trust

1. **Duty of care** – A board member (director) must discharge his or her duties with care and prudence. A director doesn't always have to be right, but he or she must act with common sense and informed judgment.

A director must actively participate in the management of the association, including attending meetings, evaluating reports, reading minutes and reviewing the performance of the CEO.

A director should receive sufficient information to carry out his or her duties. When a problem exists, a director has a duty to inquire into the facts.
2. **Duty of loyalty** – A director has a duty to give undivided loyalty to the association. Decisions must promote the association's purpose. Any signs of conflict of interest should be avoided. If a conflict arises, it should be reported immediately, and the director may be required to prove that the transaction is fair and reasonable and in the best interest of the association.
3. **Duty of obedience** – A director has a duty to follow the association's governing documents: the articles of incorporation and the bylaws. A director also has a duty to

comply with state and federal laws that relate to not-for-profit associations.

other duties

- Adequate financial records and controls – The board is responsible for reviewing the association's annual budget prior to its adoption and should require the treasurer to produce timely and adequate reports. Budget status reports should be required on a predetermined periodic basis.
- The board is responsible for appointing an audit committee, or approving an independent audit firm each year, and also when a new treasurer takes over. This report is approved at the meeting specified in the bylaws.
- Safeguarding assets – Policies should be adopted: e.g., policies on investment, conflict of interest, purchasing, development, etc., and adhered to.
- Observing donor restrictions – It is important to keep faithful to donor intentions. Periodic reporting to the donor by appointed volunteers or staff should be adequate for determining if these obligations are fulfilled.
- Responsible solicitation activities – Solicitation policies or non-solicitation policies should be developed with thought to the mission of the association.

The fiduciary obligations of board members involve core principles that have remained essentially unchanged for many years. Generally board members of not-

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fiduciary, con't.

for-profit associations such as the PTA are free to make their own decisions with respect to corporate actions, and board members will not be held liable under the law for any failures, so long as the decisions were made in good faith, with due care and without any self-dealing. Boards should always make informed decisions, and it is expected that board members use whatever resources are available to them to keep informed.

All board members should be mindful of their responsibility to conduct the association's activities according to its purposes and ensuring that its assets are not wasted or used for private benefit. This extends to the use of membership lists, which are assets of the PTA, and class lists that belong to the school district, that should not be used for the dissemination of private viewpoints.

important

Immediately contact your assistant or associate director or PTA region director if your PTA is contacted by the IRS, is sued or is served legal notice of an intended lawsuit.

the Volunteer Protection Act

Under the *Volunteer Protection Act of 1997*, 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 is injured because of a volunteer's willful and wanton misconduct, this protection would not apply.

four criteria must be met for protection:

- 1) The volunteer must have been acting within the scope of his or her responsibilities in the not-for-profit organization.
- 2) If required by law, the volunteer must have been properly licensed, certified or authorized by the appropriate authority in the state in which the harm occurred.
- 3) The harm caused by the volunteer must not have been due to willful or criminal misconduct, gross negligence, reckless conduct or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer.
- 4) The harm caused by the volunteer must not have been due to the operation by the

volunteer of a motor vehicle, vessel, aircraft or other similar vehicle.

additional protection

Punitive damages in any action against a volunteer may not be awarded (assuming the volunteer was acting within the scope of his or her responsibilities to the not-for-profit), unless the plaintiff can establish by clear and convincing evidence that the cause of the injury was due to willful or criminal conduct by the volunteer or a conscious, flagrant indifference to the rights or safety of the individual harmed.

For example, a PTA holds a catered event and uses PTA volunteers to help serve the food. If people were to come down with food poisoning from the catered food, the volunteer food servers could not be held liable for it. While people could still sue the PTA or the caterer, the individual volunteers and their personal assets would be protected.

The law also protects volunteers by eliminating joint and several liability with respect to non-economic damages; i.e., pain

and suffering. If a volunteer has contributed to an injury and there are several defendants, determination would have to be made as to the percentage of liability attributed to the volunteer.

The Volunteer Protection Act does not protect a volunteer from being sued and held personally liable under certain circumstances. A volunteer may be:

- Sued personally if the conduct in question constituted a crime of violence, a hate crime, a sexual offense or a violation of federal or state civil rights laws.
- Held personally liable if the volunteer was under the influence of alcohol or drugs at the time of the alleged misconduct.

The Volunteer Protection Act applies to volunteers only and does not provide for additional protection to the not-for-profit organization itself. It applies only to 501(c)(3) organizations, such as PTAs, and to governmental entities.

The law does not prevent a not-for-profit from bringing an action against a volunteer.

duties of PTA board members

all board members should...

- Have a copy of the bylaws, procedures, their job description and should create an annual plan of work.
- Attend unit/council meetings.
- Attend region and state PTA workshops and conferences pertaining to their work.
- Attend New York State PTA Convention, Legislation/Education Conference and Summer Leadership Conference.
- Notify the president when unable to attend a meeting.
- Keep a record of expenses and submit bills to treasurer.
- Be ready to report (in writing) at executive and general membership meetings when necessary.
- Study the files of predecessors.
- Keep records of individual and committee work to be turned over to successor (see bylaws for specific time) including all materials, financial records and correspondence pertaining to the position.
- Perform duties as assigned to them from time to time.

- Remember that they represent the PTA.
- See themselves as advocates for children and youth as they serve in their PTA office or chairmanship.

note:

It is important to remember that a person may fill only one position, according to Robert's Rules of Order Newly Revised. In PTA, only one name may be listed for each office or chairmanship and only one person may vote.

what is a plan of work?

- A plan of work shows the goals for a committee and the means by which those goals will be reached. These should include a calendar of activities and the budget.
- The plan of work should be based on the needs of the school and community's children as identified by the members. The goals give guidance for the projects, programs, meetings and other activities.
- The budget for each committee should allow for its necessary expenses and can be changed as needed.

elected officers

The officers of the unit, council or region PTA as specified in their bylaws.

president

The president is elected to direct the affairs of the association in cooperation with the other members of the executive committee and executive board for a term of office specified in the bylaws.

The duties and responsibilities of the president are covered thoroughly in **Section 2, The President's Guide.**

vice president(s)

The vice president(s), who may be called upon at any time to assume temporarily the place of the president, should make a thorough study of the president's duties and responsibilities and be familiar with the work of the association.

The vice president does the following:

- Presides at meetings in the absence of the president or upon the president's inability to serve.
- Assumes the duties of the president in the event of the president's resignation until the position is filled in accordance with the bylaws.
- Acts as aide to the president and assumes responsibility for duties assigned by the president.
- Does not act as ex officio of any committee in the absence of the president.
- Performs any other specific duties that may be provided for in the bylaws or procedures (standing rules). For example:
 - Coordinates the work of the chairmen.
 - Updates the PTA news on the bulletin board in the teachers' lounge, school lobby or both.
 - Is responsible for completing and submitting award applications.
 - Coordinates attendance at region PTA workshops, conferences and trainings and New York State PTA Convention and Summer Leadership Conference.
- Represents the president upon request.

volunteer, con't.

This law was intended to provide certain protections to volunteers, but is not an absolute protection from lawsuits. PTA board members should exercise their fiduciary responsibilities with care, follow the insurance guidelines provided in **Section 5, Finance and Insurance**, and should not hesitate to seek advice from their region PTA assistant or associate director or the provider of the PTA insurance.

secretary

The secretary is responsible for keeping accurate records of the proceedings of the association. The secretary does the following:

- Maintains an accurate record of PTA memberships as received from the membership chair or committee.
- Records all business transacted at meetings of the association, executive board and executive committee and presents the minutes for approval at the next meeting of that governing body.
- Has on hand for reference at each meeting a copy of the:
 - Approved bylaws and procedures (standing rules)
 - Agenda
- Minutes of previous meetings, including treasurer's reports
- A list of unfinished business
- A list of committees, chairmen and members
- List of the membership
- In consultation with and at the request of the president, assists in the preparation of a meeting agenda.
- Reads and/or distributes printed copies of the minutes of any previous meeting for approval.
- Counts a rising (standing) vote when requested by the presiding officer.
- Acts as custodian of all records, except those specifically assigned to others, and promptly delivers all records to successor.

- Furnishes delegates with credentials for voting at convention.
- Calls the meeting to order in the absence of the president and vice president(s) and conducts an election of a president pro tempore.
- The secretary also assumes these additional duties if the bylaws do not provide for a corresponding secretary.
- Conducts the correspondence of the association.
- Notifies officers, committee members and delegates of their election and promptly sends to the appropriate PTA administrative office the names and addresses of newly elected officers and those officers serving a second term.
- Sends out notices of executive committee/executive board meetings.



minutes

Minutes should contain records of all action taken by the group, including the exact wording of every motion, the name of the member who introduced the motion, and the actions taken on the motion. The secretary or presiding officer should request that the maker of a motion put the motion in writing if it is long or involved.

The minutes should be as brief as possible and should be reported in the order in which business is presented at the meeting. The action taken by the association, not what is said by the members, is recorded. An official record of the minutes must be maintained. The method for keeping this official record should be put into unit procedures.

secretary, con't.

Minutes of executive board meetings are approved by the executive board; minutes of the association are approved by the general membership. Minutes of a special meeting are approved at the next regular meeting. Minutes are not approved at a special meeting.

Minutes of the previous meeting are read or distributed for approval at the opening of each meeting. Any corrections should be incorporated into the official copy. The word “approved” or “approved as corrected” and the date of approval should be written at the end of the minutes of each meeting.

The minutes are signed by the secretary and kept on hand for seven years before archiving.

suggested outline for minutes

- Kind of meeting – regular, special, annual or adjourned
- Name of governing body (association, executive board or executive committee)
- Date, place and hour of meeting
- The names of the president and secretary present, or, in their absence, the names of the presiding officer and secretary pro tem (member taking minutes)
- The attendance counts to establish a quorum
- Statement concerning the minutes of the previous meeting, whether they were approved as read or mailed or as corrected or whether reading them was dispensed with and why (If dispensed with, the minutes must be approved by the executive board)
- Report of the treasurer
- Reading of the communications
- Reports of the officers, executive committee, executive board, standing committees and special committees
- All motions (except those withdrawn); points of order and appeals, whether sustained or lost; and the name of each member who introduced a motion, but not the name of the seconder
- Program topic, method of presentation, names of participants and important points covered
- Hour of adjournment

“Robert’s Rules of Order are the rules of a fight; they are intended to prevent unfair advantage and to give the minority a fighting chance.”
– H. S. Elliott

eight steps to a motion

Only members are legally qualified to make motions, discuss and vote.

1. Member obtains the floor.
2. Chair assigns the floor.
Member is recognized by the chair, who nods or announces member’s name.
3. Member makes the motion.
4. Another member seconds the motion.
“I second the motion.” If there is no second, the chair says, “Motion is not on the floor for lack of a second.”
5. Chair states the motion.
6. Chair opens debate or discussion of the motion.
“Is there any discussion?”
7. Chair calls for a vote.
“All in favor say ‘aye.’”
OR
“All those opposed say ‘no.’”
8. Chair announces result.
“The ‘ayes’ have it and the motion is carried, and we will...”
OR
“The ‘nos’ have it and the motion is lost.”

Amendments

Before the vote is taken on a motion, it may be amended by:

- Inserting or adding a word or words, or paragraph
- Striking out a word or consecutive words
- Striking out words and inserting others in their place
- Substituting one paragraph or another motion for the original

treasurer

The treasurer, as authorized custodian of the funds of the association, receives and disburses all money as prescribed in the local bylaws or authorized by action of the association and, therefore, is covered under the New York State PTA insurance and fidelity bond which covers all PTA board members handling funds. The treasurer should issue a receipt for all money received.

At least two people should always be given the task of counting money, and both should sign the tally sheet verifying the amount. Money collected should be turned over to the treasurer with a receipt. The treasurer should deposit the money without delay. **All bills should be paid by check, never by cash.** The checks must be signed by two officers, usually the president and the treasurer. The signers of the check should not be related by blood or marriage or live at the same residence. This applies also when people are counting money. **A minimum of three signatures should be recorded with the bank so that any two officers may sign checks.** No blank checks should be signed by any person.

If a voucher (written authorization for expenditure) or warrant system is used, the voucher or warrant is written, usually by the secretary, when the executive board or the membership votes to expend money. Checks are then written for the purposes authorized by the vouchers or warrants.

The bylaws provide that the treasurer present a financial statement which is then filed for audit. This financial statement should be referred to the auditor or

auditing committee, which should report to the association as the bylaws require.

The treasurer's annual report and the auditor's report are presented, usually at the annual meeting. The auditor's report is adopted. However, if the annual meeting does not coincide with the end of the fiscal year or the completion of the audit (often scheduled to be made at the end of the fiscal year, or at the time that officers change), the treasurer may still present the financial report to the association several months before the books are audited. Additional audits within one fiscal year may be conducted as deemed necessary.

The treasurer shall deliver to the auditors the following:

- Checkbook and canceled checks
- Itemized statements of bills paid (cancelled checks and bills should be kept seven years)
- Bank statement of the balance
- Treasurer's book
- Vouchers or warrants, if such a system is used
- Any other material requested by the auditor, such as receipts

In addition, the treasurer does the following:

- Studies carefully all references to dues and finances in **National PTA's Money Matters Quick-Reference Guide, Section 5, Finance and Insurance**, and in your local, New York State and National PTA bylaws.
- Keeps accurate and detailed account in the treasurer's permanent book of all the money received and disbursed.
- Preserves all vouchers, receipts, bank statements and canceled checks.
- Submits a written statement at regular meetings of the association, including total

balance on hand at the beginning of the period covered by the report and the separate amounts credited to the general fund, the state fund and the special funds (if the association carries any special funds), receipts, disbursements, and balances on hand at the date of the report.

- Receives all money for all accounts – local, state and National PTA, per capita dues, Founders Day gifts, etc.
- Deposits all money in the name of the PTA and in a bank approved by the executive committee. Association funds shall not be deposited in either the school's account or personal account of the treasurer or any other member.
- Pays by check all bills as authorized by the president, executive board or association.
- Keeps the record of the National and state portions of membership dues and of all other National PTA and state money separate from the record of the general funds of the local unit.
- Forwards to the state office the state PTA and National PTA portions of the dues; each remittance should be accompanied by a statement showing the name, code number of the PTA unit, and the number of its members. **Submits the first payment by October 31.**
- Pays the insurance premium per building to the **state PTA by June 1.**
- Cooperates with the membership chair and the secretary in keeping an accurate list of PTA members.

Refer to Section 5, Finance and Insurance, and the National PTA Money Matters Quick-Reference Guide

other possible members of the executive board

immediate past president

The immediate past president is not an officer. Consult the unit or council bylaws to see if the immediate past president is a voting member of the executive committee or executive board.

parliamentarian

A parliamentarian is an authority in procedures for conducting meetings. A parliamentarian is not an officer. Robert's Rules of Order Newly Revised is the authority to be used by all PTAs, according to their bylaws. If the unit or council wishes to have a parliamentarian, the appointment of that position should be listed under the duties of the president and the executive committee. The parliamentarian is a non-voting member of the executive board.

The primary duty of the parliamentarian is to advise the presiding officer on questions of

parliamentary law and matters of procedure. The parliamentarian should sit near the presiding officer for convenient consultation and should always be referred to as "the parliamentarian." Introduce the parliamentarian before business of the meeting is transacted.

An organization may go outside its own membership, when practical, for the services of a professional parliamentarian. If it does, the parliamentarian should be given a copy of the bylaws and all other rules of the association well in advance of the meeting to study and be able to refer to quickly. The advice given by the parliamentarian on points not covered in the bylaws must be derived from the current edition of Robert's Rules of Order Newly Revised.

The presiding officer may call on the parliamentarian for advice at any time. When something

being done is out of order, the parliamentarian may place a note where the presiding officer can see it. Only with the agreement of the presiding officer or at the request of a member is the parliamentarian permitted to rise and explain a parliamentary point to the assembly. The presiding officer alone has the power to make decisions or rule on points of order and is not obliged to follow the recommendation of the parliamentarian.

council delegates

Unit bylaws indicate the process by which council delegates are selected. Council delegates may be nominated and elected by the same method and at the same time as the other officers of the association, may be nominated and elected as officers of the association, may be appointed by the president in cooperation with the executive committee, or may be elected by the executive board. Please refer to the bylaws to determine which method applies to the specific unit.

Council delegates are not officers simply because they are elected. If the bylaws call for the election of council delegates, it is because their representation is felt to be important enough for the association to make the decision. A unit may, however, decide to make them officers. If they are not on the executive committee, they should be on the executive board.

historian

All groups should have a sense of their past if they are to understand what they are today and where they are going tomorrow. The historian may be elected or appointed, according to the bylaws.



continued on page 14

other possible members, con't.

The historian can gather together records for the future members of the group to review as they plan their goals. The information might include the following:

- Name of association, date and location of organization
- List of elected officers
- Bylaws (original and current)

The historian's report is usually adopted at the annual meeting and becomes a part of the official record of the association.

committee chairmen

Each level of PTA is encouraged to establish committees. Their primary objectives are to promote awareness of and seek solutions to the unique challenges confronting children and families in rural and urban life. The committees help coordinate, alone or in coalitions, the efforts of organizations,

institutions, agencies and individuals working for the welfare of the children and the youth in those communities. To facilitate the work of these committees, chairmen are appointed.

Much of the work of PTA is accomplished in standing or special (ad hoc) committees, and laying the groundwork for the task the committee has to accomplish begins with the chairman.

all chairmen should:

- Meet with the committee as often as is needed.
- Within the committee, design a plan of action and present it to the executive board for approval.
- Encourage participation of all committee members.
- Contact the region PTA counterpart when needed.

- Report to the executive board.
- Pursue the committee plan after it is approved by the executive board.

administrator

- Be an advisor on school and school district policy.
- Help coordinate PTA functions with school functions.
- Help and assist PTA to better serve the needs of children and education.

teacher liaison

- Attend PTA meetings.
- Encourage among teachers support for PTA programs and projects.
- Discuss PTA programs at teacher meetings and bring concerns of the teachers to the PTA.

Refer to Section 9, School and Community

committee structure

Committees are the method through which the talents and energies of the members are involved, organized, and directed into helping PTA develop and implement educational and community service for the benefit of children. Through such membership participation, the PTA can become a vigorous and vital force in the community.

A committee can be one of the most productive tools of a PTA. The contribution and the participation of the members on the committee will determine its success or failure. The findings of a committee have a direct impact on decisions made by the PTA's executive board. The energy put into the work of the committee has a direct influence on the direction the PTA takes.

advantages of a committee

A small number of people can meet more often, deliberate more efficiently, and work more rapidly than a large, unwieldy organization. Informal procedures allow the chair to enter the discussion, make motions and vote on all questions. Members can speak more often and longer. Questions can be asked while the discussion is going on.

Committees contribute to the efficient operation of a PTA. In most cases, a committee is concerned with the communication of information, with assisting the leadership in the decision-making process by providing needed information, or with helping to facilitate or implement a project or activity.

formation of committees

A committee consists of three or more people elected or appointed by the executive board on the basis of qualifications for the committee's assignment. The purpose of the committee is subject to the control and direction of the association. Chairmen usually serve a term of one year, and bylaws specify how many terms a chair may serve in the same committee.

Ordinarily there are two types of committees, standing and special.

Standing committees perform a continuing function and remain in existence permanently, or for the life of the assembly that created it. The members serve for a term that corresponds with that of the officers as stated in the bylaws.

committee structure, con't.

Special or ad hoc committees are formed to accomplish a specific objective. Their existence stems from a new or current concern or project the PTA is facing. The association may form a special or ad hoc committee to consider or handle a single subject. When the project is resolved, the information is gathered, or the project is completed, the committee will disband. The life of the special or ad hoc committee may be no longer than a few days or may span a considerable period of time, according to the nature and complexity of the situation.

selecting the committee chair

Consult the unit, council or region PTA bylaws for procedures on selecting committee chairmen.

If no procedures are identified, and the committee is established by the president, executive committee or the board, that person or group has the right to designate the chair. If no member is designated, the committee has the right to elect its chair.

The chair should become familiar with the subject, research PTA resource materials, and can contact region and state PTA counterparts.

responsibilities of a chair

The committee must develop a plan and proposed budget for approval by the executive board. The leadership qualities of the chair are of great significance to the group's success or failure. A chair should:

- Start and end meetings on time.
- Allow enough time for the group to become acquainted.
- See to it that as many members as possible participate in the discussion.

- Keep the talk directed to the topic and toward the objective.
- Try to avoid being an expert but do take part in the deliberations without being too aggressive. Active chairmen seem to do best when they act as guides and leaders. Their groups get better results.
- Help the committee by summarizing the decisions from time to time.
- Report to the executive board as needed.
- Approve publications or reports of the committee and then submit them to the executive board for approval.
- Have vision and maintain objectivity.
- Be aware of the dignity of every person in the group and never says anything negative about an individual.
- Be seen as sincere and thoughtful by the committee.
- Summarize the meeting at its conclusion, and the actions to be taken by the individual members as their assignments.
- The president is an ex officio member of all committees except the nominating and audit committees. An ex officio member has the same rights as the other committee members, but is not obligated to attend meetings of the committee, and is not counted in determining if a quorum is present.
- Committee members can be selected in a variety of ways:
 - Volunteer sign-up sheets
 - By invitation of the chair or another committee member
 - Those who share similar interests
 - Board members serving in related jobs
 - Members of the community
 - Invite potential committee members to join your PTA if they have not already joined!

responsibilities of committee members

The success of the committee depends on the contributions made by each member.

A committee member should:

- Be prepared for the meeting. Read and study all material distributed in advance.
- Participate in the discussion.
- Keep prejudices in check and respect the other members' views.
- Share experiences relating to the subject under discussion for the benefit of the committee.
- Approach problems impersonally and objectively, avoiding arguments.
- Avoid discussing extraneous matters.
- Follow the discussion and ask for clarification, if needed.
- Resist temptations to "make a speech".

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committee structure, con't.

- Accept and follow through on assignments and be prepared to report at the next meeting.

the committee meeting

Preparation for the committee meeting is essential to its success. Every committee member, including all ex officio members, must be notified of the time and place of each committee meeting. If the chair neglects to call the committee together, any two members of the committee may do so. A majority of the members must be present to transact business unless the association or its bylaws have authorized a smaller number as a quorum.

select proper day, time and location

- Selecting the best possible time and place can do much to insure good attendance and participation.
- Consider establishing a regular time and place suitable to the greatest number of the committee members.
- You should confirm the date, time and location for your next meeting as the last item of each agenda.
- Hold only meetings that are necessary.

give proper notification

- Meetings should be scheduled as far in advance as possible.
- Reminder notice should be given close to the date.
- Plan the meeting.
- Prepare an agenda, determining topics and time needed.
- If the agenda includes unfinished business as well as new, clear up the unfinished business first.

- Stick to the schedule! Decide what information and/or equipment reports, charts or other aids will be needed and have them ready.
- Inform well in advance those committee members who are to be called upon to give a report. Be sure they know how much time they are being given to make the report.

be sure everyone is acquainted

- Don't take it for granted that all members know each other. Make the necessary introductions.
- Name tags are useful.
- Start and end the meeting on time.
- Courtesy to members who are present requires that the meeting start on time.
Remember – their time is valuable! And, starting without

the habitual latecomers may curb the habit.

- Periodically summarize what has happened enables latecomers to enter into the discussion and serves to remind those present of what has been discussed and decided.

be mindful of comfort

- Be aware of such matters as outside noise.
- Triangular, square, round-table and U-shaped seating arrangements will encourage better communication.
- If the meeting is long, break the session with a coffee break.
- Give a clear, concise statement of the objectives of the meeting – just what is to be undertaken and accomplished. The meeting will produce better results if the members know at the outset what is expected of them.



committee structure, con't.

get participation

Open the meeting on a positive note. It will help stimulate participation and encourage members to express opinions freely. Discussion helps uncover leadership qualities and fosters friendly cooperation. Every member should be made to feel that they have unique and individual contributions to make that will enrich and contribute to the meeting.

A conscious effort on the part of the chair to show an active interest in member participation will help draw frank and honest expressions of individual opinions from committee members.

keep the meeting moving

- Start with a clear statement of the objectives of the meeting.
- A meeting that drags tends to become meaningless and generally unproductive. Such a meeting is almost sure to cut down attendance at future meetings.
- A meeting that is kept on schedule will inspire committee participation and promote action.
- Summarize the direction of the committee from time to time.

give assignments to committee members

- Committee members are eager to help in achieving committee objectives.
- Given responsibility for obtaining information or doing research, committee members will retain enthusiasm and interest.

records

- A record of the committee's work during the current year will be important to future committees.
- The record can be in the form of minutes or a good summary.
- It should be distributed to all committee members. Be sure to include decisions reached, justification for the decisions, and follow-up action decided upon. The names of the members present, the presiding officer's name and names and affiliation of all guests should also be recorded.
- Be sure all committee members receive copies of reports prepared for the PTA's board.

making a report to the board

Good committee ideas and recommendations for action should be prepared and made known quickly. These reports are usually presented in written form at a regularly scheduled board meeting. Normally the committee chair presents the report to the board. If the chair is unable to make the presentation, a committee member knowledgeable on the subject should make the presentation.

If you are giving a report to the board:

- Begin with a simple statement of the background of the issue and your findings, activities or proposal.
- List all findings without editorializing.
- Explain what is significant to the unit or council about the committee's findings.
- Explain to the group the parameters of the proposal.

Committees allows a small group of members to work effectively.

Chairmen of committees are either appointed or elected - consult your bylaws.

Chairmen are responsible for the work of the committee.

- Who would need to be involved? What would be the time and dollar costs?
- Don't allow comments at meetings to overrule the work of a committee. If a committee report is not accepted it is referred back to that committee for further study.
- If the report calls for action, make a motion. (Motions made by committee require no second). Vote.

evaluation

When the committee's work is completed, or at year's-end, an evaluation of progress should be made including recommendations or suggestions for the future.

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committee structure, con't.

committee procedure book

One of the most valuable tools for an effective PTA is a procedure book that clearly identifies roles and responsibilities. The guidelines included in the procedure notebook will provide a more secure foundation for local unit continuity and personal success.

A PTA procedure notebook is the property of the PTA and must be returned to the president at the end of each year. All procedure notebooks should be reviewed annually by the incoming executive committee and updated if necessary.

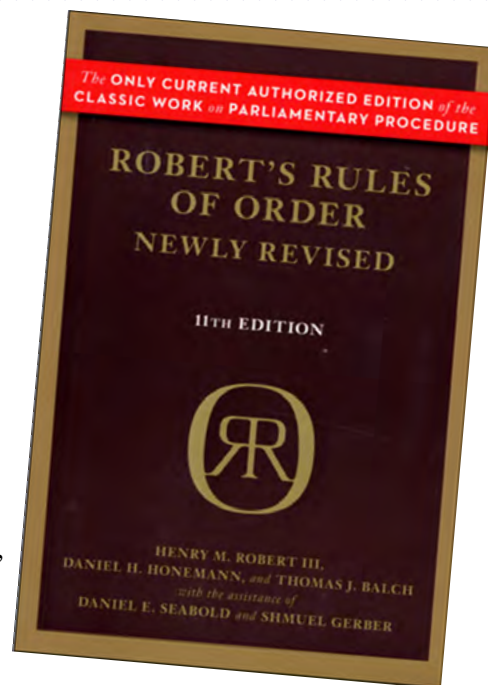
suggested procedure book contents

- Committee roster (names, addresses, telephone numbers).
- Bylaws of unit or council.
- Procedures of unit or council.
- Job description of position.
- Calendar/timeline to accomplish goals of committee.
- Approved unit or council budget.
- Annual activity calendar.
- Executive board roster.
- Region/state PTA contacts' names and addresses.
- Newsletters (unit, council and region).
- Handbooks, guides, brochures and other publications (region, state and National PTA).
- Pertinent newspaper and magazine articles.
- Committee's predecessor reports with evaluations and recommendations.

each year's record should contain:

- List of committee members.
- Approved plan.
- Budget.
- An accurate account of funds expended; include receipts (supplies purchased, printing, postage, etc.).
- Reports of committee meetings and any other meetings attended.
- Record of a facility booking for a meeting or event, to include the name of facility coordinator, phone number, cost of facility and other pertinent information.
- Record of all publicity used: local unit or council newsletter, radio, TV, posters, newspapers, school publications.
- A record of items purchased or donated.
- A copy of all handouts, fliers, thank-you notes.

Refer to Section 7, Bylaws, Procedures, Nominations and Elections



Use Robert's Rules of Order as a guide to run your meetings.



basic committees

Each level of PTA should decide which committees should be established. The size, location, focus and membership composition of a PTA will help determine what committees are necessary to carry out the PTA's programs and goals.

In PTAs with small memberships, members of the executive board may act as a committee for a particular event or program. Or, in the case of hospitality, the president may ask two or three different PTA members to help with each meeting.

budget and finance

The budget and finance committee has the responsibility for developing a budget for the PTA. This committee should consist of at least three members, with the treasurer as chair.

Every PTA should have its own program to promote children's well-being, home-school cooperation and community betterment, and PTA funds should be used for its advancement. Funds generated by the PTA should be predetermined and budgeted for purposes that further PTA work, such as:

- Conducting or attending conferences
- Participating on committees
- Undertaking projects and programs
- Participating in the region PTA's annual meeting and events
- Participating in the New York State PTA Convention, Summer Leadership Conference, Legislation/Education Conference and PTA Advocacy Month

Refer to Section 5, Finance and Insurance.

nominating

The nominating committee is perhaps the most important of PTA committees. Elected by the members (usually early in the year), the nominating committee's responsibility is to nominate one person for each office as listed in the bylaws. The nominating committee must work diligently to secure the best possible leaders for the PTA.

Refer to Section 7, Bylaws, Procedures, Nominations and Elections.

program

See page 21 and refer to Section 10, Programs, Awards and Recognitions.

bylaws

The bylaws committee is responsible for making sure the bylaws are reviewed, revised if necessary and submitted, using the appropriate Bylaws EZonline pattern, to the region PTA bylaws chair at least 90 days prior to the expiration date. All bylaws must be reviewed and approved by the association every three years, even if there are no changes.

Procedures are the cumulative record of the unit or council's experience and serve as a guideline for current and future officers and chairmen. Procedures are adopted and may be amended at any regular meeting of the executive board. It is the bylaws committee's responsibility to be sure that this living document is kept up-to-date.

Refer to Section 7, Bylaws, Procedures, Nominations and Elections.

hospitality

The goal of the hospitality committee is to develop a spirit of friendliness among members of the PTA and others who attend its meetings. In order to make people feel comfortable and eager to return, the chair and members of this committee must be knowledgeable about social customs of the community.

objectives

- To help the PTA reach out to include all members
- To contribute to everyone's comfort at meetings
- To assist in discovering special talents and interests of members

suggested activities

- Extend hospitality and friendship before and after meetings to all who attend. Help to answer questions about PTA.
- Offer name tags to members and guests at each meeting.
- Cooperate with other committees such as membership.
- Help to plan and provide special events such as a "thank you" for teachers, school transportation staff.

A list of suggested committees and/or chairmen follows on pages 20 - 31.

Brief summaries are given of the potential roles and responsibilities these committees/chairmen can serve.

basic committees, con't.

cultural arts/reflections

This universal language stimulates the child's creativity, self-expression and imagination. It helps the child to discover new ways of expression and enhancing self-esteem. Nowhere can the student better express thoughts and inner feelings than through arts. Love of the arts is a personal resource for life. The arts can provide comfort and pleasure through literature, music, films, painting and performing and decorative arts. Through the arts children can learn discipline, thinking, communication and marketable skills.

The objective of the committee is to encourage people of all ages to enjoy and participate in the arts; to emphasize the need for early childhood experiences in literature, art, music, dance and other forms of creative expression; and to encourage a school program that uses the cultural arts for classroom study as well as for extracurricular activities. It can also administer the National PTA Reflections Program locally.

reflections

Reflections is a National PTA cultural arts program that encourages students to express their thoughts and feelings through creative arts. For more information about the Reflections Program, refer to Section 10, Programs, Awards and Recognitions.

suggested activities

- Develop a directory of arts activities in the community. It could be a calendar of events such as craft fairs, museum shows, exhibits, concerts, historical tours and school activities. Use the PTA



- newsletter to inform members about upcoming events.
- Participate in observances of Music in Our Schools Week (usually in March or April) and Youth Art Month (March).
 - Sponsor a creative arts festival including exhibits.
 - Arrange for exhibits of children's art in local stores, hospitals, government buildings, museums, libraries, shopping centers and other suitable sites.
 - Bring previewed programs of quality to the school.
 - Work with the local BOCES which may provide partial funding for many cultural arts programs. Some programs could be offered to the family and community as well.
 - Tactfully review the school's art curriculum, the district's policy and how much funding is allocated for art programs. Actively support the arts and seek support from the community for a strong arts curriculum.

education

A PTA may feel that one committee dealing with all of its education-related topics is sufficient to fulfill its purposes. Other PTAs may wish to establish several committees to deal with specific aspects of education.

education issues

Education issues are an important component of the PTAs activities. This committee is responsible for keeping abreast of issues such as curriculum, textbooks, grading, student placement, funding for the instructional program and other student related activities. The education committee works closely with the school and district administration and the local school board. The committee provides PTA members with current information on education, offers programs to inform the membership about education issues, and solicits input from PTA members in order to respond to their interests and their needs.

The education committee should also work closely with the school-based shared decision team members.

suggested activities

- Host a school board Candidates' Forum.
- Parent-teacher conferences ("How-to" suggestions for parents and teachers).
- Bring the presentation of a new curriculum to a PTA meeting.
- Report cards (how to respond to help a child succeed).
- Involve local Regent as a speaker.
- Submit articles for the newsletter and encourage educators to do so in their area of expertise.
- Write letters of introduction from the PTA to the local Regent, local legislators, teacher organization and school board association in the fall.
- Contact your region education chair and New York State PTA education coordinator as resources.

basic committees, con't.

- Keep up-to-date on items pertaining to education. Keep board and members informed about the issues. Check the resolutions after convention and address the ones assigned to education.
- Attend New York State PTA Legislation/Education Conference and prepare information, workshop or program on issues.
- Provide an opportunity for parents, teachers and students to work together toward a common goal.
- Access information from National PTA's website, www.pta.org, and our state PTA's site, www.nyspta.org.
- Invite the faculties of local colleges to join PTA. This is an excellent source for PTA programs.

career and technology

As the world changes, schools and society must also change to properly equip young people for their future lives. Career and technology education should be integrated into all existing courses in a child's education from kindergarten through high school.

objectives

- Help students from a very early age to develop a more positive concept of themselves and an awareness of the different roles and occupations of family members and those around them.
- Enhance career awareness by identifying career areas and requirements and the relationship between school experience and careers.

suggested activities

- Review with the school administrator the type of career

education program that exists. A complete career education program should include opportunities for the students to develop an awareness of their own interests and talents and how to fit them in with the options and demands that constitute the world of work.

- Conduct programs to help parents understand the program in the school and the role that they play in helping their children develop an awareness of their strengths and interests.
- Support the efforts of New York State PTA to secure legislation and financial aid for vocational/technical education.
- Develop career awareness in the high school and provide information on continuing vocational/technical education after graduation.

communication

A PTA may establish a single communications committee responsible for all internal and external communications projects and functions, or may assign specific duties to more specialized committees. This can include publications, newsletters, websites.

suggested activities

- Review state PTA and National PTA's, as well as other and relevant publications, for leadership, parent education and program use.
- Promote subscriptions for community establishments, such as libraries and doctors' offices.
- Promote member use of PTA websites.
- Create a committee to create or maintain a unit website.

continued on page 22



basic committees, con't.

health and wellness

Health is a state of physical, mental and emotional well being, not merely the absence of disease or infirmity. Parents, the school and the community all share responsibilities for the health of children.

objectives

- To see that parents and other adults are educated about the health needs of children and youth and how to meet those needs.
- To work to ensure adequate health and mental health services.
- To ensure that children and youth are taught to respect and care for themselves through a comprehensive, sequential school health education program that covers every facet of good health.
- Become familiar with National PTA and New York State PTA positions that pertain to health.
- Urge the school district to hire certified health educators to teach all health classes.
- Attend health conference and workshops sponsored by PTA and other health organizations.
- Be a liaison to the school health team.

- Keep the state coordinator/ specialist and region health chairmen informed of special projects, programs, events and local issues.
- Work with community agencies and organizations on common goals and maintain a file of contacts.
- Work with staff, parents and students to see that programs are available to meet the students' needs.
- Work closely with the other chairmen who have common concerns: legislation, safety, juvenile protection, substance abuse, parenting and environment. Together, you can plan informative PTA programs.

suggested activities

- If your school and/or community has a health-related problem, work with other groups to address the problem.
- Research the services provided by and available through the New York State Department of Health, the county's Department of

- Health, the New York State Education Department, and community organizations serving health needs and make the information available to parents.
- Develop a file of newspaper and magazine articles, pamphlets and materials from government, community service organizations and private agencies.
- Share information at meetings, using bulletin boards and displays, and by writing articles for the PTA newsletter and local newspapers.
- Support pending legislation on health issues through phone calls, letters and visits to legislators. Keep copies of all correspondence for files.
- Arrange a health fair in the area with representatives from health-related organizations.



basic committees, con't.

A PTA may prefer to set up specific committees that deal with individual health and welfare issues or concerns relevant to the school community.

critical television viewing/ media committee

The objectives of the committee are to provide training and to encourage parents to learn critical viewing skills so that they can more effectively educate their children about the media, television violence, the internet and commercialism.

This committee's responsibility is to help families become aware of the influence that media may be having on their lives, to help parents and children become critical and careful media consumers, and to seek improvements in the contents of television and radio programming, movies and print media.

environment

Protecting the environment for future generations is the responsibility of all members of society. New York State PTA supports the Board of Regent's Environmental Bill of Rights whose guiding principals state that:

- Every child and school employee has a right to an environmentally safe and healthy learning environment which is clean and in good repair.
- Every child, parent and school employee has a 'right to know' about environmental health issues and hazards in their school environment.
- School officials and appropriate public agencies should be held accountable for environmentally safe and healthy school facilities.
- Schools should serve as role models for environmentally responsible behavior.

- Federal, state, local and private sector entities should work together to ensure that resources are used effectively and efficiently to address environmental health and safety conditions.

objectives

- Informing and educating through newsletter articles and at meetings.
- Organizing projects and programs within the school or community and with other community organizations.
- Advocating for action on environmental problems. PTA members can be advocates for community programs to ensure that the guiding environmental principles of the Board of Regents are adhered to in their school district.

suggested activities

- **Air Pollution** – Encourage reduction of unnecessary driving. Plant trees which absorb carbon dioxide and other air pollutants.
- **Environmental Tobacco Smoke (ETS)** – Help parents understand the serious health risks of ETS. Disseminate information about legislation which provides added protection for children.
- **Hazardous Materials** – Encourage parents to make sure hazardous materials at home are properly labeled and stored. Work with local or state environmental offices to conduct community-wide hazardous waste collection days.



- **Indoor Air Quality (IAQ)** – Encourage families to make sure that combustion sources (stoves, fireplaces), household cleaning products and pesticides are located in well-ventilated areas and are not sources of home indoor air pollution. Work with school officials to address IAQ issues in schools. Sponsor programs and workshops to educate people about IAQ.
- **Lead Poisoning** – Recommend testing homes and schools for lead. Educate parents about the need to get their children tested for lead exposure and, if necessary, treated before damaging health effects occur. Be sure that lead abatement projects follow federal guidelines and that work is done on schools when it is not in session.
- **Pesticides** – Provide information to families about IPM (Integrated Pest Management).

continued on page 24

basic committees, con't.

- **Radon** – Encourage families to test their homes for radon. Urge school officials to develop a radon testing program.
- **Solid Waste** – Sponsor a waste reduction program at school or in the community. Emphasize reduce-and-use practices in addition to recycling. Conduct school-wide assemblies to educate students on waste reduction and recycling programs.
- **Water Pollution and Drinking Water Quality** – Inquire about water test results in school and encourage home water testing.

juvenile protection

Juvenile protection includes a wide scope of interests. The committee can focus attention on areas of juvenile protection such as cults, suicide, dropouts, hazing, sex abuse, strip search, vandalism, Persons in Need of Supervision (PINS), homelessness, screening of school employees, latchkey children, missing children, date rape, runaways, prison systems, rock videos, cyber safety and TV violence. They may wish to discuss



with school staff other issues of potential local concern.

objectives

- To promote the National PTA program of continuous health and welfare of children from birth through school years.
- Work with the school and safety chairman to develop positive programs to deal effectively with juvenile protection issues.
- Become familiar with the services provided by or available from the county's Division of Youth, Department of Social Services, Child Protective Services and other community organizations serving young people in need of assistance.

suggested activities

- Become familiar with the National PTA and New York State PTA positions that pertain to juvenile protection.
- Read National and New York State PTA publications and materials.
- Know the policies of the school and the school district that affect the welfare of children and youth.
- Be a liaison to the school health team for program planning and support. Work with other community agencies and organizations on common goals and maintain a file of these contacts.
- Attend conferences dealing with juvenile protection.
- Support pending legislation through phone calls, letters and visits to legislators.
- Communicate with legislators and public officials.
- Keep the region PTA informed of special projects and events

and to find out what other PTAs are doing.

- Develop programs for assemblies or PTA meetings in cooperation with other chairmen whose work is related to juvenile protection.
- Share information with the PTA at meetings, with faculty members, and by submitting articles for the PTA newsletter and local newspapers.

Refer to Section 9, School and Community

legislation

PTA is the largest grassroots association promoting the welfare of children and youth. Legislative activity is an integral part of the work PTA does within its units, councils and regions to “secure adequate laws for the care and protection of children and youth” and to support a system of free public education. The work of the legislation committee should be nonpartisan and in alignment with the National PTA and New York State PTA guidelines.

- A **unit committee** should include the president, legislation chair and education, environment, health, juvenile protection, publicity, safety, special education chairmen, etc.
- A **council committee** should include at least one representative from each member unit.

objectives

- Provide information to members about proposed legislation and regulatory issues that affect the health, welfare, safety and education of children and youth and what, if any, positions National and/or New York State PTA may have pertaining to such current issues.

basic committees, con't.

- Provide information to assist the members to understand how the various segments of government (local, state and federal) operate. **Refer to Section 9, School and Community.**
- Present to policy makers and legislators at all levels the PTA position on proposed laws, regulations and policies that affect children and youth.
- Work with other groups where appropriate to achieve PTA goals for children and youth.



suggested activities

- Review and become familiar with the “Basic Policy”, Resolutions, New York State PTA’s “Where We Stand” and position papers.
- Set goals for the year.
- Ensure the unit budget includes funds for committee expenses – for conference fees, publication fees, etc.
- Meet with principal/superintendent for their input.
- Attend region PTA conferences and workshops.
- Arrange informal meetings with local legislators.
- Keep members informed using emails, newsletter articles, fliers, online resources and phone calls. Receive *Our Children (OC)*, *New York Parent Teacher* and “Advocacy Newsbriefs...”. Share information provided through New York State PTA publications and online resources.
- Attend New York State PTA Legislation/Education Conference.
- Coordinate efforts with council, region and state PTAs.
- Encourage PTA members to sign up for Engage and respond to email alerts.

- Facilitate participation in Virtual Lobby Day.

For New York State PTA Convention:

- Prepare presentation of “Basic Policy” and Proposed Resolutions to unit or council for discussion and approval before convention
- Make sure delegates have secured voting credentials.
- Prepare a report for the association on resolutions with recommendations for action by the unit or council.

Refer to Section 8, Advocacy and Section 9, School and Community

membership

The effectiveness of the PTA in transforming concern for the welfare of children into action will be determined by how well the membership committee succeeds.

Each PTA should have a continuing year-round effort to involve and recruit new members. The goal of the membership committee is to build an informed, active membership of parents, teachers, students and all citizens of the

community who are familiar with the Mission, Purposes, policies and programs of both the New York State and National PTAs.

Well-laid committee plans, made early and carried out with enthusiasm and imagination throughout the year, will contribute much to the success of the membership enrollment. Every member of the board should be well informed about PTA so they can recruit new members. The membership committee could include chairmen for hospitality, programs, publicity and newsletter as well as the unit president and school principal.

objectives

- Set realistic goals that are supported by the executive board.
- Develop a campaign and calendar of activities covering the entire PTA year.
- Use PTA publications to aid in recruiting and retaining members.
- Provide promotional materials and membership cards at all functions.

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basic committees, con't.



- To reach out to the school community.

suggested activities

- Attend region and state PTA membership and marketing workshops.
- Utilize national and state PTA membership and marketing resource materials.
- Advertise the advantages of membership in local, state and National PTA to members and the community.
- Seek guidance from, and share ideas and materials with, the region PTA membership chair.
- Know what recognitions are offered at each level of PTA for achievements in membership.
- Meet deadlines for reporting and payment of dues.

Refer to Section 6, Programs, Membership

newsletter

A newsletter is a vital link between home and school promoting pride in membership and bringing each reader in touch with PTA. Its purpose is to provide accurate objective information consistent with PTA policies. The newsletter

informs – about PTA and what it is doing, about what is happening in the school, and about the problems and concerns of parents.

objectives

- To inform about PTA issues and activities, about what is happening in the school, and about education and legislation.
- To publish accurate, factual, timely information that is easy to read and understand.
- To share news from the National, state and region PTAs.

suggested activities

- Proofread thoroughly.
- Work with the president to set a publishing calendar.
- Decides on content and layout for each issue. The president approves the final copy and checks with the administration on matters of school policy.
- Oversees production and distribution of the newsletter, in hard copy and/or electronically.
- The committee can individually write articles or request articles from knowledgeable PTA or school community members. The editor should approve all content.

a PTA newsletter should include:

PTA news

- President's message
- Location, time and topic of PTA programs and meetings
- Membership information (not just requests for money)
- Committee reports; news from council
- Information from local, region, state and national PTA sources

School news

- Administrator's message.
- School activities and events.
- Aspects of an instructional program with background possibly written by a teacher.
- School board decisions and news.
- Reports of Shared Decision Making teams.

Parent news

- Parent education (from school nurse, librarian, psychologist).
- Information on legislation that affects children and education and what to do about it.
- Community news.
- Safety tips.
- Health information.

family engagement

A family engagement committee can promote parent education that gives parents and all caregivers the necessary knowledge and skills to help their children develop and thrive. It may go by another name, but any committee whose goals are the same as the objectives listed below is in essence a parenting committee.

objectives

- To uphold the Purposes, Mission and Beliefs of New York State PTA in our school communities.

basic committees, con't.

- To raise the standards of home life (from Purposes).
- New York State PTA will maintain its commitment and service to all children... through increased parent and community awareness, advocacy, education and involvement (from Mission).
- Programs and materials should be provided to enhance parenting skills (from Beliefs).
- Promote the adoption and implementation of National PTA's Standards for Family-School Partnerships.

suggested activities

- Effective discipline and behavior modification programs.
- Tips on engaging a child's cooperation.
- Ways to improve parent-child communication.
- Practical problem-solving.
- Understanding the physical, developmental and emotional needs of children.
- Providing for the health and safety of children and youth at home, in school and in the community.
- How families, especially children, can handle grief.
- A family engagement committee (possibly comprising the health, safety, juvenile protection and family engagement chairmen) can help plan effective programs for PTA meetings.

Refer to Section 10, Programs, Awards and Recognitions

Pick a Reading Partner (PARP)

In 1987, the New York State PTA assumed the helm of the Pick a Reading Partner (PARP) program begun by the late State Senator

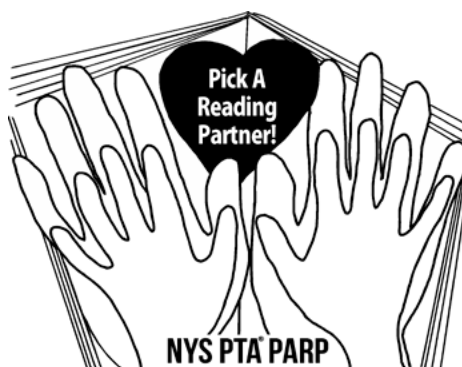
James Donovan, Chair of the New York State Senate Education Committee. PARP is a program designed to foster the love of reading.

objectives

- To promote childhood literacy by asking parents or caregivers to set aside fifteen minutes daily to read with their child.
- To offer a program during the school year that supports reading and participation of children, caregivers, teachers, administrators, school staff and the community in reinforcing the pursuit of reading for enjoyment.
- New York State PTA sponsors PARP awards annually. The committee can work closely with reading teachers to make parents aware that they can help reading readiness in young children. PTAs should ensure that schools provide well-stocked libraries in every building and make books and other resources available to all students.

suggested activities

- Encourage programs that identify potential reading problems by early screening; seek adequate remediation by the school.



- Review the school's program of instruction in the use of the library.
- Urge that the school library be staffed by at least one professional school library media specialist.
- Volunteer services to the school library.
- Provide opportunities for adults to learn to read.
- Encourage vision screening of incoming pupils.
- Arrange bilingual programs for parents on parent involvement in reading education.

Refer to Section 10, Programs, Awards and Recognitions

Refer to Section 9, School and Community, for a complete section devoted to parent involvement and Shared Decision Making

Information on Room/Grade Level Representatives is given in Section 10, page 3

program

For the PTA, the term program means several things: the total planned activities of the association, the presentations or special events scheduled for each meeting, and the printed program of activities for the year.

The PTA usually selects a specific field in which its activity will most effectively serve the needs of the children and youth in its community. Then it plans a program to attain certain objectives. The program plans should be sufficiently flexible so that they may be modified to meet the changing conditions, concerns and needs of the community.

continued on page 28

basic committees, con't.

In some PTAs, programs are planned by particular chairmen on topics that are covered under their chairmanship. In other PTAs, programs are thought to be very special and involve the entire executive board. Committees working on specific issues of concern to the community may wish to assist program planning to highlight their issues. But a PTA program can be as simple as inviting the school librarian to the December meeting to offer suggestions on good books for children!

Offering a program at each meeting, however simple it is, will increase attendance at meetings and improve involvement of members in the activities of the PTA.

objectives

- Promote the Purposes of the PTA.
- Fit the needs of the school and community.
- Embrace interest of the entire membership.
- Translate individual thinking into constructive group action.
- Encourage active participation of as many members as possible.
- Be sufficiently varied in manner of presentation, and attendance.
- Start and end on time.

suggested activities

- Assist a PARP or Reflections chair in offering a program at a PTA meeting.
- Host an author, librarian or reading specialist to discuss good children's books.
- Invite the athletic director to discuss the sports programs offered in the school district

Refer to Section 10, Programs, Awards and Recognitions

public relations

The public relations committee is responsible for making sure the PTA is using effective, two-way communication in the pursuit of its goals. This means working with each PTA committee to develop communication strategies.

Public relations is more than publicity, although telling the PTA story is important. The public relations committee promotes involvement, finding effective ways to listen as well as spread the word. It also establishes a positive and enthusiastic atmosphere that enhances adult productivity on behalf of young people.

Good PR can increase public awareness of the PTA as a contemporary, activist association. With public awareness established, support can be generated for the PTA programs and activities, and greater emphasis placed on education and children's issue. This favorable image for PTA as an association can be created by increasing the visibility of your particular PTA/PTSA and its activities.

characteristics of good public relations

- Honesty. PTA's efforts must be factually directed rather than emotionally based.
- Thorough research. The event being reported must be presented accurately by those who understand the history, objectives and structure of the association.

suggested activities

- Organize plans early for the year ahead and learn all you can about National PTA and New York State PTA – its goals,

programs, policies and current projects.

- Learn the names of the persons to contact at the local newspapers, radio and TV stations.
- Maintain a file including a list of contacts in the various news media, clippings of published articles pertaining to the PTA, and copies of related correspondence.
- Study the media with which you will be dealing. Know newspaper deadlines and the form in which the written or telephoned material should be presented.
- Become familiar with all important reference materials published by National, state and region PTA.
- Know, understand and be able to explain the policies, programs and unique terminology.
- Read New York State PTA and National PTA publications and their respective websites, www.nyspta.org and www.pta.org and join their social networking sites, such as Facebook or Twitter.
- Attend the state convention, region PTA workshops, council programs, as well as meetings of the local unit.
- Become familiar with "Where We Stand".
- Never express personal opinion. If unsure how to answer a reporter, research the issue with the president, or representatives of the region PTA.

safety

Safety means providing children and adults with an environment that is as free as possible from hazards.

basic committees, con't.

objectives

- To encourage home, school and community to join together to determine needs and implement appropriate safety measures.
- To promote efforts to help children develop safe living habits.
- To become familiar with the National PTA and New York State PTA positions that pertain to safety.

suggested activities

- Keep informed and disseminate appropriate information on first-aid courses, rescue squads, poison and suicide centers, and emergency preparedness programs.
- Obtain material from the New York State PTA health specialist to disseminate.
- Offer timely safety tips on seasonal activities and special holidays during the year; publicize new hazards as they arise.
- Help prepare exhibits, visual aids and other materials for public and PTA education and action.
- Talk to school transportation director who is responsible for making sure that the school district's owned or contracted buses meet state and federal standards.
- Cooperate with other chairmen in circulating up-to-date checklists for hazards.
- Prepare bicycle helmet information for distribution.
- Proper bicycle helmets must be worn by all children under



age 14 and should be worn by children who are riding behind the bicyclist.

- **Bus safety** – Plan programs to include student safety education, bus drills, driver training, bus monitors and seat belts. Bus drills are required by Commissioner's Regulation – three per year with specific steps to be performed.
- **Camp safety** – Plan a workshop to help parents establish safety at overnight, day, traveling day, municipal and out-of-state camps.
 - Plan programs based on National and state calendars of safety related events.
- Arrange a CPR presentation or class.
- Inform on issues of fire safety.
- Provide information on lead poisoning, toxic art supplies
- Help review school building's emergency evacuation plan at its annual review time and give information about the plan to parents.

special education

Special education and its issues focus upon the needs of children and youth that are instructed through different programs and services usually beyond the typical school setting. There is an emphasis on least restrictive environment (LRE) which can include a variety of different children and youth: some who are in need of remediation; some who are "classified" under IDEA including preschool through age 21; some covered under Section

504 of the Rehabilitation Act; students covered under ADA (Americans with Disabilities Act); and Gifted and Talented students.

Units and councils are encouraged to form special education committees, if their school or school district does not have a SEPTA (Special Education PTA unit).

objectives

- Support, strengthen and promote a greater awareness and understanding of special education and the student with any exceptional needs.
- To support parents and caregivers of children with special needs, including sharing information and knowledge of special education regulations.

suggested activities

- Inform of changes in the law, regulations and/or state education policy that may affect students with special needs.
- Maintain contact and be involved with the Board of Regents, VESID, State Education Department and advocacy groups who represent those with disabilities and giftedness. Share information, concerns and projects.
- Suggest workshops and speakers on topics that can help better advocate for exceptional children.
- Develop and maintain a resource and information file.
- Attend conferences to assist in the understanding of new developments in special needs.
- Write articles for the PTA newsletter.
- Contact the region PTA to share information and for networking.

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basic committees, con't.

- Work with the chairmen of committees such as education, family engagement, health and wellness, safety, juvenile protection, substance abuse and legislation.
- Always maintain the laws of confidentiality when working with parents or guardians. Never give out any information without the express permission of the parent or guardian.

Refer to Section 8, Advocacy and Section 9, School and Community

substance abuse

Substance abuse is currently this nation's number one health problem. In addition, substance abuse is especially taking a toll on children and youth. It also continues to be the top of the list of concerns of the American public. Substance abuse programs should have a great deal of support in schools and our communities. However, denial may make the job more difficult.

objectives

- To encourage parents and teachers to work with children and youth to prevent and combat the abuse of tobacco, alcohol and other drugs. The committee works closely with other PTA committees and local organizations concerned with health and juvenile services.

suggested activities

- Become familiar with National and New York State PTA positions on substance abuse issues.
- Subscribe to National PTA's *Our Children (OC)* magazine.

- Attend workshops on substance abuse and related topics.
- Become familiar with the school district's drug policy.
- Develop a resource and information file.
- Work with community organizations and agencies dealing with substance abuse issues. These agencies provide a wealth of information.
- Work closely with other chairmen such as safety, juvenile protection, parenting, education, legislation.
- Work with administrators and teachers to see that there is solid substance abuse education and programs in the schools.
- Work with the school district to provide information about the dangers of alcohol, tobacco and other drugs.
- Prepare a program on a substance abuse topic.
- Participate in New York State Alcohol Awareness Month (usually April), promoting alcohol-free proms and graduations.
- Write articles in the PTA's newsletter. Articles from PTA publications may be duplicated. Articles need not be long and

may include a few interesting facts or teasers or a quiz to create awareness.

- Serve on school or district committees dealing with health issues; encourage schools to become "Drug Free Schools."
- Work with students to provide alternative activities to "hanging out."

ways and means

PTAs work hard developing activities and programs in classrooms and throughout their communities that help children and families. Fundraising should be done to secure resources for PTA programs – not overshadow them or be the primary focus.

Refer to Section 5, Finance and Insurance and National PTA's Money Matters Quick- Reference Guide

A PTA may wish to establish one general committee that deals with all fundraising events, or it may prefer to set up specific committees that deal with individual events. The PTA may hold one "main" fundraiser or a number of smaller ones. For every event the committee should consider the following:



basic committees, con't.

the 3-to-1 Rule

When planning the year's activities, PTAs should use the 3-to-1 rule. For every fundraising activity, there should be at least three non-fundraising projects aimed at helping parents or children, or advocating for school improvements.

questions to consider when planning a fundraiser

- Does the program require children to purchase a product in order to participate?
- Is it expected or implied that children will be required to sell to others?
- If there are classroom materials, are they credible and accurate?
- Has the company produced the materials in partnership with a recognized authority?
- Are the materials complete and not deceiving or misleading by omission?
- Is the language and organization of material age-appropriate?
- Is the information designed to sell products?
- Do the text and illustrations uphold the PTA's non-discrimination policies?
- Is this a financial win-win situation where the PTA is benefiting financially or otherwise from the relationship?
- PTA policy is very clear that children should never be exploited or used as fundraisers.



checklist to strengthen the PTA

- ☒ Keep in mind the purpose of the PTA. Before embarking on any program or project, make sure that it advances one or more of the Purposes of the PTA and that it has the potential to improve the lives of children.
- ☒ Think for yourself, but consider carefully the opinions of others.
- ☒ Review the bylaws periodically to ensure that you are following them, and that they provide a reasonable framework to guide your actions and protect the rights of members.
- ☒ See that officers stay within the limits of their authority as defined by the bylaws. Basic decisions, such as establishing the budget, should be made at a general meeting of the PTA, not by the executive committee.
- ☒ Promote a spirit of teamwork. Try to be a peacemaker and consciously attempt to reduce tensions.
- ☒ Strive for consensus in making important decisions. Solutions with which most people agree are more likely to be successful than those agreed on by a few because everyone will have a stake in making them work.
- ☒ Do your share of the thankless tasks that must be done. The success of any group depends in part on the "behind the scenes" work of many individuals doing routine jobs.
- ☒ Manage the PTA's money responsibly. Remember that those who pay dues have a right to participate in the decisions as to how to spend the money and to a strict accounting of the monies.
- ☒ Keep your sense of humor. Working hard for important goals doesn't preclude enjoying that work. The PTA should be fun as well as work.
- ☒ Keep long-range goals in mind. Remember the importance of being part of a total group that advocates for all children at all levels of the PTA.
- ☒ Persevere in spite of setbacks and difficulties. As the PTA works toward worthwhile goals, expect frustration and problems. Worthwhile goals require sustained hard work.

going out with class

The time to begin preparing for a smooth transition to your successor is at the beginning of your term. By sharing responsibility, delegating authority and including others in planning, you give others the chance to practice the skills necessary to lead the PTA. At the same time, you clearly signal that you recognize the need to move on when your term ends. The health of the PTA depends on recruiting new leaders and moving them up the ladder.

To provide a planned rotation so that the same people do not serve year after year:

- Include in every officer's job description the responsibility to groom successors.
- Openly discuss the need for new people.
- Encourage talented leaders to move on to jobs at the council, region or state level.

Creating a smooth transition for incoming PTA officers and chairmen is a most important duty of those who are leaving office. **To make the transition easier, try these steps:**

Write it down. Go through all the activities in which the PTA has been involved. Make brief notes of what's to be done and when. Note the preparation time required for each activity and who is responsible.

Clean it out. Not everything in your files or procedure book will be helpful. Pass on reports, samples of programs, National or state PTA materials. As you clean out files,

ask yourself, "What would have been useful to me?" Keep what you think might be helpful; toss the rest.

Pass it on. This is essential, even if you can't complete steps one and two. The material is no help to anyone unless the appropriate new officer or chair has it. For the successor it's both a practical help and welcome security.

Ask yourself, "What do I wish I had known when I started?" Make notes on anything that comes to mind.

Back away and be available.

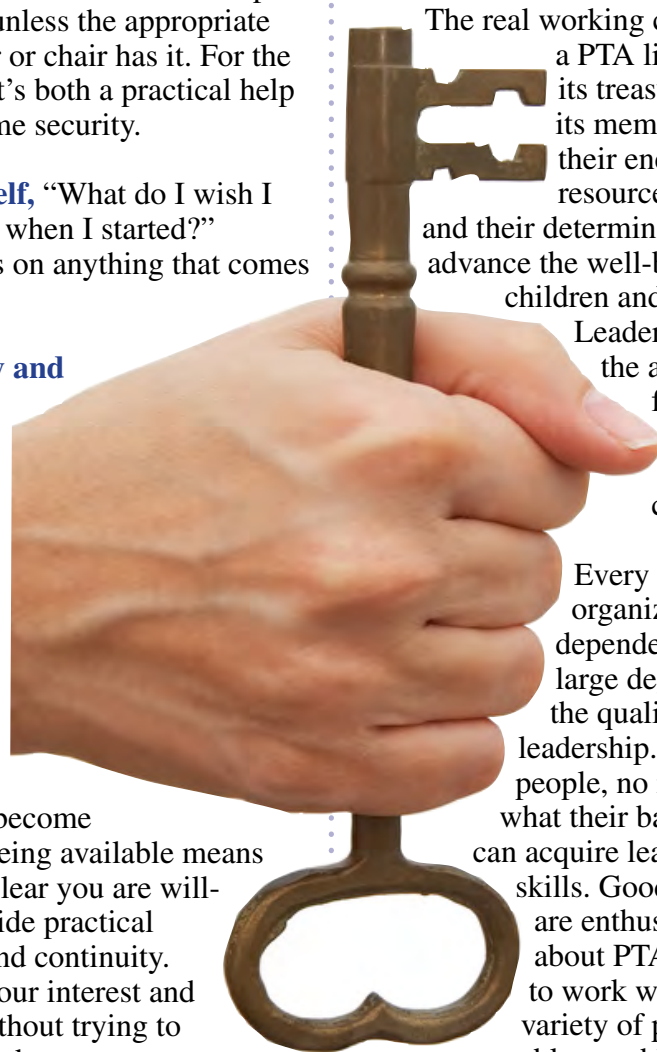
Backing away lets new leaders gain confidence, try new ideas, improve on past good work, and become stronger. Being available means making it clear you are willing to provide practical guidance and continuity. Maintain your interest and concern without trying to dictate based on your past experience.

Remember there is more than one way to do a job. Encourage those who follow to develop their own leadership style.

effective leaders the key to successful PTAs

"Training strong PTA leaders will help build an effective PTA in your school or district."

Penny Leask, Past President,
NYS PTA



The real working capital of a PTA lies not in its treasury but in its members – in their energy, their resourcefulness and their determination to advance the well-being of children and youth.

Leadership is the ability to facilitate action and guide change.

Every organization is dependent to a large degree on the quality of its leadership. Most people, no matter what their background, can acquire leadership skills. Good leaders are enthusiastic about PTA, able to work with a variety of people and problems, able to be objective, flexible and able to think of new ways to solve problems.

characteristics of effective leaders

Leadership is a process of influence – the ability to direct the problem-solving processes of others. To lead is to direct, encourage, inspire and coordinate. A good leader develops personal skills and encourages and trains new leaders who will follow.

effective leaders, con't.

effective leaders:

Are considerate and warm with those with whom they must meet.

Have faith in people, offer them challenging opportunities, and delegate responsibility to them.

Know that people feel a commitment to decisions in which they have participated. Creative leaders involve people in every step of the planning process – assessing needs, setting goals, developing action steps, carrying out activities and evaluating results.

Value individuality. Creative leaders sense that people are more productive when they use their unique strengths, talents, interests and goals than when they are trying to conform to some imposed stereotype.

Stimulate and reward creativity. In our world of accelerating change, creativity is a basic requirement for the survival of individuals, organizations and societies. As leaders, we must be willing to hear ideas of fellow members, even if they sound different at first.

Have commitment to a process of continuous change. If we are to attract more members, we have to take up the challenges that fit today's parenting needs.

Acknowledge achievement. Everything we do as volunteers should have a purpose within the organization.

Encourage people to be self-directing – to make their own decisions about completing the task they have been given.

Understand that all PTA decisions are made in the context of our mission and purposes, and do not pursue personal agendas.

to lead the PTA, you need: knowledge

Knowledge about the PTA – its purpose, policies, functions, programs, advocacy efforts, etc. Be familiar with issues that the PTA is actively involved with at national and state levels as well as in the community.

Basic PTA knowledge can be gained by reading and asking questions. Knowing where to find information is important. National PTA and New York State PTA have materials and resources to assist you. **Additional resources are listed in Section 11 – Appendix.**

Attend the conferences, workshops, conventions and events hosted by all levels of PTA. Networking with PTA members from other communities will offer new ideas as well as a better understanding of the true scope of PTA activities, interests and achievements.

Knowledge about yourself – your abilities, interests, strengths, talents and even your weaknesses. Knowledge about yourself is important to a leader. Build self-confidence by being knowledgeable on the topic and prepared for the job to be done. As you learn about yourself, remember to involve others who have different attributes and talents. It is important to complement your abilities rather than to duplicate them.

Provide opportunities for yourself and others to perfect your skills.

Keep in mind that we strive for excellence but we do not have to be perfect to be leaders. PTA is an association made up of many kinds of leaders; in this diversity is strength.

Practical Ways to Engage and Motivate Volunteers

provide meaningful tasks

- Provide meaningful tasks and tell volunteers how their work contributes to the overall success of the PTA organization or project.
- Give volunteers an orientation that links volunteer participation to the broader mission of the PTA organization.
- Create positions that achieve diverse tasks.
- Don't assign tasks that are unorganized or waste volunteers' time.

show volunteers respect

- Consider the individual PTA volunteer and don't ask a volunteer to do something he or she can't handle.
- Give volunteers clear directions and the necessary tools to perform tasks. Be available to answer questions.
- Seriously consider volunteers' advice and recommendations. Listen.

working effectively with people

A PTA leader needs to learn to relate to and work with different kinds of people. People have diverse backgrounds, interests, concerns and ideas about what the PTA is and should be. Chairing a meeting or leading a group requires more than a knowledge of parliamentary procedure: it requires skills in working with other people.

following are some suggestions on how to work effectively with people:

- Listen to all expressions of opinion, whether you agree or disagree.
- Be sure your “body language” indicates fairness, courtesy and patience.
- Refrain from taking sides in the discussion.
- Prevent any one person from monopolizing the discussion.
- Be a peacemaker. Try to reduce tensions by pointing out areas of agreement and encouraging people to approach issues from the point of view of what is best for children and the PTA.
- Encourage positive action. Concentrate on what can be done. Focus on fact-finding.

attracting and retaining active members

Active members – people who are motivated to use their knowledge and skills within the PTA – are essential to the success of a PTA. A good leader knows how to attract and retain active members.

People are motivated to give their time and energy to the PTA when the PTA deals with issues important to the needs of the children in the school and community. The number of single-parent families and families with both parents working is increasing; these parents, especially, are protective of their free time.

You can find out what issues are important to the PTA membership by circulating questionnaires, consulting with the school principal and other school personnel, listening to people and asking for ideas.

utilize motivational techniques such as:

- Showing a personal interest in people.
- Seeking their opinions and advice.
- Being sincere with credit and praise.
- Treating ideas with interest and respect.
- Admitting errors honestly.
- Making facts available to all members so they are knowledgeable.

encourage participation of members

Encouraging widespread participation of members is an important function of a PTA leader. To increase membership participation:

- Recognize that groups can solve some problems better than can individuals.
- Give each member the opportunity to share experiences and ideas, as well as to work on goals.
- Resist the temptation to take the easy way and do everything yourself. It is frequently easier to do it yourself than to make 30 phone calls to recruit a committee and find a chair, but the effort required to seek and encourage participation pays great dividends. Spreading out the work cuts down on volunteer “burnout” and keeps enthusiasm high.
- Respond promptly to questions or offers of help from members. If you are not able to answer at the time, let them know you

will follow up; when you have the answer, contact them.

- Divide jobs into smaller, more manageable parts. Busy people may not have time for a big job.
- Look at new ways to get things done.
- Build a warm, caring, open atmosphere to generate enthusiasm and a willingness to be involved.

accepting and evaluating criticism

An essential element of leadership is the ability to accept criticism and deal with it honestly and constructively.

- Encourage suggestions and ideas for improvement.
- If you are criticized, ask yourself: “Is the criticism justified? Can I do anything about it?” Accept the responsibility for the criticism and make changes after thoughtful consideration.
- Continuously evaluate what you are doing. Measure the efficiency of methods, effectiveness of programs, morale within the group, and progress toward goals.
- Go on to the next challenge without tearing yourself apart by worrying about mistakes.

two of the most destructive words in the English language are “if only”

*“If only – I had . . .
. . . spoken up in that meeting;
. . . been better prepared;
. . . thought of another way to do that.”*

Instead of those words, substitute “next time.”

“Next time I’ll . . . say what I really think; . . . do my homework.”
This is a positive response to criticism.

delegation: entrusting a job to someone else

Delegating responsibility is a vital part of becoming a good leader and managing time wisely. You owe it to yourself and to the PTA to involve as many people as possible. Ask yourself frequently, “What am I doing that someone else can do as well as, or better than me?”

When you delegate, you entrust the job to someone else, along with the responsibility for doing the job. Be specific about the job or assignment – what the job entails, the time in which it is to be done, and the authority the person has to get it done.

key elements in delegating responsibility are:

- Carefully assess members’ skills.
- Match skills with available jobs.
- Give people authority to do the job.
- Be specific about the task.
- Decide together when it should be done.
- Let those to whom you have delegated responsibility make decisions.
- Trust them to do the job.
- Delegation is not only an essential part of developing new leaders; it is an essential part of time management.

Giving people the responsibility for tasks of increasing importance will help them develop the ability to assume other leadership roles.

imagination: doing things in new ways

PTA leaders need imagination to develop new ideas and new ways of doing things. The world we live in is constantly changing. PTAs need to be aware of these changes and to consider ways to adapt PTA programs, projects and meetings as changes occur.

We must eliminate negative phrases such as the following from our thoughts: “We’ve always done it this way”; “We’ve never done it before”; “Let’s not be the first”.

We must avoid the tendency to automatically defend the status quo and to “put down” ideas that are different from our own.

- Try something new, or do things differently. In response to this willingness to change, new people are more likely to come forth with new ideas.
- Try, test and refine your ideas and encourage innovative ideas from others.

time management: getting things done

Have you ever watched in awe as a good leader stayed calm and appeared unhurried in the middle of an unbelievably busy schedule?

Busy people who handle a multitude of challenges have learned how to make time for important things – how to budget their time wisely. Usually we make time for the urgent things but some of the important things may not get done unless we know how to manage our time into:

- **Important and urgent.** The speaker for the evening PTA meeting cancels late that afternoon. A decision must be made and action taken quickly.
- **Urgent but not important.** You agree to give a speech that someone else was going to give. Since the date is definite, the speech gets done before other things.
- **Important but not urgent.** The PTA has decided to study an education issue. Such a project may not have a specific deadline for accomplishment.
- **Busy work.** In looking up material for the newsletter, we start cleaning out files rather

than doing the research. While it is important to clean out files periodically, it does not contribute to the goals for the newsletter.

- Set goals, objectives and priorities:
 - Clearly define your goals, long- and short-term, and make a list.
 - Under each goal, make more detailed lists of objectives (the specific steps that will accomplish the goal).
 - Assign priorities. Write down the three or four most important goals.
 - Maintain the priorities. Be firm with the use of the word “no” if a request does not contribute to your goals. Accept only those requests to which you can give time and attention.
- Accept the fact that perfectionism is unattainable and a great waste of time. We need to do things well – not perfectly. Even the original copy of the Declaration of Independence had three errors.

simple time savers

- To-do lists
- Weekly reminder lists
- Telephone answering machines
- Throwing out unnecessary papers and keeping electronic files and emails organized
- A file box to carry to each meeting with materials for chairmen and officers (distributes mail efficiently)
- Preserve dinnertime as family time – don’t make exceptions

communication: the lifeline of the PTA

Communication involves sight, sound, thoughts and feelings.

communication is:

- The transmission or exchange of information and ideas.
- Interaction between individuals or groups.
- Understanding of words and actions.
- Conveying of attitudes and beliefs.

good communication involves both a sender and a receiver and requires:

- A realization that people have different backgrounds, values and beliefs. Words mean different things to different people.
- An awareness that each person has feelings and that those feelings influence the way that person sends or receives a communication.
- A desire, as a sender, to build feelings of security in those who are listening to the message.

- A desire, as a receiver, to listen from the sender's point of view.
- Communication must be tailored to the situation and to the audience. Talking to one person requires a different approach from that used in talking to a large, diverse group. Always consider carefully whom you are talking to, how much they already know about the subject, and the message you want to get across.

Remember, email communications can often be misunderstood, as they are not meant to replace verbal communication.

nonverbal communication

Nonverbal communication is communicating with facial expressions and parts of our body. We communicate thoughts, feelings and attitudes whether we speak or not. It is important to be aware of gestures that "speak" for us.

we communicate with:

- Smiles and frowns
- A shrug of the shoulders
- A pat on the back
- A wink or a lowering of the eyes
- A wave of the hand
- Turning our back, etc.

Many times we are not aware of these nonverbal kinds of communication. You may want to ask a friend to critique your physical behavior; it is difficult for us to see ourselves as others see us. We may, through habit, give impressions that we do not want or mean to give.

For example:

- Do you constantly arrive late at meetings?
- Do you sit at a distance from the group?

- Do you move restlessly as people are speaking?

Or do you communicate nonverbally in a positive way:

- Do you have eye contact when you speak with others?
- Do you smile encouragement when listening to an idea or suggestion?

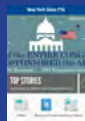
Nonverbal communication can indicate a person is interested and enthusiastic about the PTA, and will encourage the audience to be involved. When body language matches the speaker's words, the audience is more likely to understand the message. Both the speaker and the audience will be comfortable.



how good a listener are you?

Communications are only as good as the participants' ability to hear and understand both the words and the feelings behind the words. The preconceptions of the listener shape the messages he or she hears. The listener "screens" the message and reacts to what he or she "hears" and not necessarily to the message the sender intended.

For up-to-date information about NYS PTA, check out our social media by clicking on the icons located on our home page



communication, con't.

It is important to try to be an active listener – hear not only the words but also to listen for the complete message the speaker is sending.

Rate yourself as a listener by answering these questions:

- Do you listen for facts, rather than ideas?
- Do certain words, phrases or ideas so prejudice you against a speaker that you do not listen objectively to what is being said?
- When you are puzzled or annoyed by what someone says, do you try to get the question straightened out immediately, either in your own mind or by interrupting the speaker?
- If you feel that it would take too much time and effort to understand something, do you try to avoid hearing about it?
- Can you tell by a person's appearance and delivery that he or she won't have anything worthwhile to say?
- When someone is talking to you, do you try to make that person think you're paying attention when you're not?
- When you're listening to someone, are you easily distracted by outside sights and sounds?

If you answer “no” to all these questions, you are that rare person – the perfect listener. Every “yes” answer means that you can improve your listening habits. Our success in PTA depends on our ability to communicate our ideas well. Communication is possible only when someone is listening. Are you listening?

public speaking

taming the fear

Fear of public speaking keeps many members from accepting leadership roles. The keys to overcoming this hurdle are training and practice. No one was born a good speaker; everyone learned.

In developing this skill, these points are important:

- Be prepared. Understand the subject matter. Do the research necessary to understand both sides of the issue.
- Plan a catchy opening to get your audience's attention.
- Use simple, direct language. Say what you mean; don't hide behind jargon.
- Use statistics sparingly; listeners forget them. Deal instead with the impact of the statistics. Telling your audience how many children will be dropped out of the lunch program in your school is more effective than giving the budget figures.
- Vary your delivery style so the speech is not monotonous. Humor is a good break, but if you are not a good storyteller, don't try it. Use humorous “one-liners” instead.

- Look at the audience more than your notes. Eye contact is essential. Moving your eyes from one face to another keeps the whole room with you during the speech.
- Use gestures if you are comfortable with them. Shift your body from time to time so that you face each part of the audience.
- Practice your remarks at home so that you do not read the speech. If you feel more comfortable with a written speech before you, use large print, double space, and highlight points with a colored pen. As you improve as a speaker, an outline and transitional sentences will be all you need.
- Put your remarks on 3” x 5” cards; they won't rattle if you are nervous, and they give you something to hold onto.
- When answering questions, repeat each question so that everyone hears it. Be honest. Admit if you don't know the answer, but assure the person that you will find the answer and report back – and do so!

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public speaking, con't.

platform techniques

Advance planning and preparation are the first steps toward effective use of a platform. To contribute to your success, you will want to work on these techniques:

- Are microphones going to be used? Try them in advance. Ask someone who understands how to operate and adjust them to be on hand.
- When using a lectern, move to the side from time to time.
- Relax your speaking voice by breathing deeply or yawning before beginning to speak. A speech is just an extended conversation.
- Tailor your speech to the audience. Is it a PTA audience or is it people who need basic information about the PTA in relation to the subject? Is it a

small group of 25 or a larger group of 300? Are you the only speaker or are you part of a panel of speakers? How much time have you been given? Is there time for a question-and-answer period?

- Will you use audiovisual equipment, overhead projectors or a blackboard? Make arrangements before the meeting and arrive early to check the items before using them.
- Dress appropriately for the time of day and the kind of meeting. If the meeting is televised, the color you wear is important. Avoid jangling jewelry. Help the audience to focus on “what you have to say” rather than on you personally.
- Know how long you are expected to speak and stay

within the time allotted. Keep your watch on the lectern in order to check it unobtrusively.

- During the question-and-answer period, allow the audience time to shift gears. Be comfortable with pauses while the audience thinks of questions. It may be helpful to ask a friend to be prepared with the first question.
- Everyone who speaks before a group experiences “butterflies” at times. Tension can lead to a better performance and make your presentation more exciting.
- **Before you know it, what you think of as nerves will be perceived by your audience as enthusiasm and excitement!**

notes
