



section  
4

# RESOURCE GUIDE

**New York State**  
**PTA**<sup>®</sup>  
*everychild.one voice.*<sup>®</sup>

**council guide**

New York State Congress of Parents and Teachers, Inc.

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# council guide

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## introduction



This guide addresses the council’s organization, scope, membership and relationship with the local PTA units. While local units focus their efforts on local needs and individual schools and understandably are less concerned with overall community, state and national issues, the council can draw from these units to address issues and problems larger in scope.

The purpose of the council is to bring together all the partners in education. The council is at the center of the communications network consisting of the National

PTA, New York State PTA, the Region PTA, local PTA units, school board, school district superintendent, administration, parents, teachers, business and non-parent community and children. Through council programs, meetings and publications, a council can instruct, challenge and influence its key audiences to action by promoting welfare of children and youth.

**A successful council will keep in mind what is best for the welfare of all children and youth.**

## the council

Founded in 1897, the National PTA is the **first link** in a chain to local units. It sets direction through its national board of directors.

The **second link** is the fifty state PTA branches, plus the District of Columbia PTA, the European Congresses of American Parents, Teachers and Students, the U.S. Virgin Islands Congress of Parents, Teachers and Students, Inc. and the Puerto Rico Congress of Parents and Teachers.

As the **third link**, region PTA boards carry out the work of New York State PTA and the National PTA.

The **fourth link**, the PTA council, is the closest help to local PTAs. Finally, there are nearly 1,400 local unit PTAs addressing the needs of children and youth within New York State. They disburse information from the region PTA, New York State PTA and National PTA to board members and to the general PTA membership. They are the foundation of all PTA work.

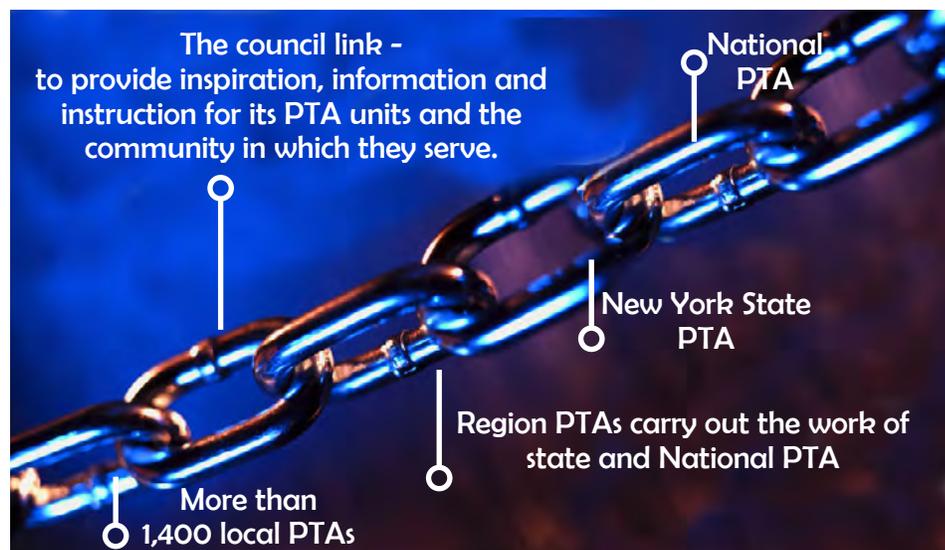
Units and councils are chartered by the state congress (New York State PTA). They are organized under state and national bylaws and are members of their respective region PTA, New York State PTA and National PTA.

While local PTAs and councils have great latitude in responding to their local needs, they are bound through several articles in their own bylaws required by the state and national associations.

The line of responsibility is, however, different from the links of this PTA chain if a unit problem arises. Because each unit and council are self-governing, unit leaders should contact their region PTA assistant director, associate director or region director for advice on internal PTA matters.

### links of the PTA chain

In PTA, units, councils, region PTAs, state PTA and National PTA are linked to form a strong chain of advocacy.



## the council, con't.

### council organization

A council of parent-teacher associations is a defined number of local PTA units organized under the authority of the New York State PTA and operates under bylaws approved by the state bylaws coordinator. New York State PTA requires a minimum number of three (3) units to form a council.

### scope and purpose

The scope of PTA council work is outlined in the Purposes of the National PTA, and New York State PTA Beliefs and Mission. Any council project should further the purpose and goals set forth in these statements.

The council's main purpose is to promote the welfare of children and youth. Its role is to inform, advise, guide, instruct and encourage the leaders of local units and to be responsive to their needs for conferences, leadership training and coordination of efforts of the member PTAs.

### membership

In a council, there is unit membership only. Each local unit is represented by delegates who participate in council activities as representatives of their unit. The local unit bylaws define who the delegates are. Council bylaws define how many delegates are allowed from each local unit. Typically, the local unit president or designee is a delegate, along with other members. The more successful councils engage local PTA board members, in addition to the local presidents in meetings and other council activities.

In New York, individual PTA units may or may not choose to become member units of the PTA council representing their area. However, it is advisable that all PTA units in

the council area become council members and participate in its decision-making.

Guests may not vote or make motions at any council meeting. They may speak only with permission of the voting body.

### relationship with the state PTA

Councils are chartered by the state PTA and function according to the provisions set forth by state PTA bylaws and standing rules.

#### New York State PTA determines:

- The number of local PTA units required to form a council (3).
- The boundaries of council territory.
- Council responsibilities and limitations.
- The official representation of councils at the state convention.

### relationship with the region PTA

- As an arm of the state, region PTAs provide schools of instruction; i.e. help with leadership development programs such as workshops, conferences, etc.
- Region PTAs determine whether councils will be represented on the region board. If so, council presidents are required to attend region board meetings. Verify with your region director if this requirement applies to your council.
- Region PTAs distribute New York State and National PTA information.

Consult your region PTA for information about how your council works with the region PTA.

### council bylaws

Councils must follow the provisions in their bylaws, as any PTA does.

The bylaws list the elected officers of the council, the number of delegates to the council each unit may send, the dues each unit is required to pay to the council, the number of meetings that should be held, duties of officers and terms of office. Bylaws should be brought to all meetings.

Council bylaws, just as the individual unit bylaws, must be reviewed at least every three years. Even if there are no changes, the council's member units must be given notice that the bylaws are updated without changes. All updates or amendments must be approved by the member units (**refer to page 5**).

### council procedures and procedure books

Council procedures, or standing rules, should define the operating details of the council. They are used in addition to, not in place of, the bylaws.

More informal procedure books include information on council activities, committees, chairmen responsibilities, etc. Files and procedure books are PTA property, not personal property.

#### Refer to Section 3, The PTA Board, and Section 7, Bylaws

### representing the PTA

When speaking for the council, take care to see that answers are accurate and reflect the PTA position, not the individual's opinion.

A council representative may express their own opinion, being clear that it is a personal opinion and not the council's. Being an officer does not take away the right of free speech.

## the function of a council

### council services

A council provides services to local units and addresses needs which are larger than can be met by a local unit. Councils generally do not engage in all the tasks listed; local unit interests and problems determine the work the council undertakes.

### the council:

- Helps build stronger, more effective units.
- Provides leadership training and leadership opportunities for local unit members. Encourages local unit members to attend region PTA conferences and workshops and state and national conferences and conventions.
- Acts as a coordinating body to promote communication and cooperation among its member units.
- Engages in community-wide projects.
- Is a link through which local PTAs can work on projects

beyond the scope of a single unit.

- Is a channel of communication between parents, teachers, school administrators, school boards, children and the public.
- May not interfere with its local units on internal PTA matters.

### the council can provide:

- An opportunity for local units to exchange ideas and plans and to solve shared problems through meetings and workshops.
- An opportunity for study groups to work on areas of interest.
- Strength to unify planning efforts to solve community-wide problems affecting children and youth.
- The incentive and assistance for local unit participation in such activities as health/welfare programs, the Reflections program, legislation and advocacy, cultural diversity, cultural arts, newsletters and publicity.

### the council helps each local unit to:

- Learn and apply good PTA practices and national and state policies and resolutions.
- Increase its capacity for service to home, school and community.
- Keep informed on education and health-related developments, research and legislation affecting children.



## council structure

### council voting body

The voting body of the council is defined in its bylaws and may consist of:

- Council elected officers (council executive committee)
- Presidents of member units, or their alternates
- Accredited delegates from member units as specified by each PTA's bylaws
- Standing committee chairmen
- Teacher representatives
- Principals from member units
- Superintendent of schools or a designated representative

### officers and committee chairmen

To be eligible to act as an officer or committee chair, a candidate must belong to a local PTA unit. Officers and committee chairmen should establish regular contact with their local unit counterparts. It is especially important for the council president to meet regularly with local unit presidents.

### council delegates

Council delegates are the connecting link between the member unit and the council. The specific number of delegates from each unit is determined by council bylaws.

Unit bylaws must conform to their council bylaws.

The unit decides the method of selecting delegates and their term of office. Delegates:

- Are chosen according to unit and council bylaws.
- May be unit presidents, unit vice presidents, principals, immediate past president, or other members of the local unit as stipulated by unit and council bylaws.
- Must be members of their local unit.

## council structure, con't.

### council meetings

Council meetings should be held often enough to accomplish council work, but not so often as to interfere with unit meetings or overburden council and unit leaders.

Typically, a council executive board or executive committee meets monthly. A council planning meeting is a good time to set meeting times, goals and the year's overall plan.

General membership meetings of the council should be scheduled at a time that least conflicts with local unit meeting times. Experience shows that council meetings can be well-attended if they fulfill a need and capture interest. The number of general membership meetings may vary from monthly to three or four a year.

### committees

Every council creates standing committees and special committees necessary to carry out its work. Your bylaws define which committee chairmen (if any) are

also on the council board. For example, newsletter editor, health/welfare, publicity, legislation, special education, cultural arts committee chairmen might be designated as council board members.

Committee plans of work should be approved by the executive board according to council bylaws.

### council president's responsibilities

The council president is in a unique position to build leadership at every council meeting by setting examples of correct procedure for planning, conducting and following up on every council meeting and by following bylaws and policies in all PTA work. The example set can help local unit delegates learn.

#### Generally, the president should:

- Encourage the attendance of all delegates.
- Urge the unit to send representation to council committee meetings when necessary.
- Represent the council, and thereby the member units, at

conventions, state and regional meetings and at other times when called on to do so.

- Represent the council to the media (radio, television and press) when invited to do so.
- Instruct the council bylaws committee to review bylaws and submit them to the PTA region bylaws chair for approval, as required, every three years by New York State PTA.

#### Refer to Section 2, The PTA President

### responsibilities of the council delegates

- Attend council and member unit meetings.
- Represent their unit in the council voting body.
- Make motions, discuss motions and vote.
- Report to the council the result of the unit membership's vote for any requested or required instructed vote.
- Keep a procedure book of their activities as a guide for future delegates.
- Take accurate and complete notes for reporting to the unit's executive board and general membership.
- Encourage unit members to attend council programs, publicize council activities, and notify PTA members of upcoming council meetings.
- Keep lines of communication open between council and the unit.
- Publicize council activities in the unit newsletter.
- Be familiar with unit, council, state and National PTA bylaws, policies and procedures.

*continued on page 6*



## council structure, con't.

### council board member responsibilities

Serving as a council 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 council.

As a council board member, you (especially the council president) 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.

Decisions made by a board are upheld by all members. 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.

### Refer to Section 3, The PTA Board

### a council must be in good standing!

New York State PTA requires that all councils:

- Review and update bylaws at least every three years. Council bylaws must be adopted by the member units before they are sent to the region PTA for the approval process.
- Have at least three (3) member units in good standing. (Once the member units have paid their insurance payments, the council will receive an insurance certificate in the



name of the council. A separate payment from the council is not required.)

- Adhere to the Purposes and Basic Policies of PTA.

### council voting procedures

In conducting the business of the council, depending upon the action to be taken, the decision may be made by an instructed or an uninstructed vote.

#### an instructed vote

An instructed vote requires the general membership of each member unit to vote on the question, notice having been given according to each unit's bylaws.

One vote per member unit is required when:

- A position is to be taken on a district-wide basis. An instructed vote may be requested or required if the issue is felt to be a sensitive one (e.g., school closings, school district budgets).
- Council bylaws are being reviewed, revised or amended.

A 2/3 vote of member units is required – one vote per unit. Units must revise their bylaws in accordance with the approved change if it affects the unit (i.e., number of delegates per unit).

- Units are requested to supply money or manpower for a council project. A majority of units must vote in favor of the project; however, dissenting units are not required to participate.

The vote shall be taken by unit roll call. Only those units who have presented the question to their general membership may vote.

The council should set a realistic deadline date for all units to report back. If necessary, a unit should call a special meeting according to its bylaws.

#### an uninstructed vote

One vote per voting member of council as specified in council

## council structure, con't.

bylaws. No member has more than one vote.

- All routine business of council not committing units to manpower or money can be decided by an uninstructed vote. Keep in mind that delegates vote according to the thinking of the general membership of their units.
- Council budgets, election of council officers, and programs for council meetings are included in this category.

### taking a position

In reporting positions taken by council, be sure to include which body of the council has voted on the matter. For example:

Instructed vote – “The (Name) Council of PTAs is in favor of (or opposed to)...”

Uninstructed vote – “As supported by (or as opposed by) the voting body of the (Name) Council.”

or

“The Executive Board (or the Executive Committee) of the (Name) Council is in favor of (or opposed to)...”

### budget and finance

#### dues

Dues provide the funds required for the council’s regular activities. Member PTA units usually pay annual dues to the council. The amount of dues, the basis on which they are collected, and the method of payment are determined by the council and stated in its bylaws. Council dues are a flat amount per PTA.

If additional funds are required for special projects, money may be raised by special contribution by the member units or fundraising projects or events.

No member unit may be compelled to contribute to a special project or participate in a fundraising event.

The fundraising project or event should be council-wide and not duplicate events held by local units nor interfere with their budgeted fundraising events or projects.

#### budget

The council budget is presented to the executive board or committee for review and to the voting body of the council for adoption. Any expenditure not provided for in the adopted budget must be submitted to the voting body of the council before money is spent.

The council should budget funds to send delegates to legislative and leadership conferences, region PTA meetings, and New York State PTA and National PTA conventions.

The standing rules or bylaws direct payment of bills for budgeted items. If procedures are not specified in these documents, the voting body of the council must approve all expenditures. The voting body must approve all unbudgeted expenditures by amending the budget to cover the expenditure.

The treasurer’s books must be audited annually according to the bylaws.

A council must have its own tax-exempt number.

Contracts should not be signed until approved by the council voting body, and only the council president is authorized to sign contracts.



## council activities

**A mission statement for councils: “Provide inspiration, information and instruction for its PTA units and the community in which they serve.”**

### working with local units

Councils shall not legislate for local units. This means that the council may neither set up rules for the local unit nor take action involving local units without the consent of the units. However, with due authorization by the individual local units, a council may carry out their wishes in matters of common interest within council boundaries. The delegates of member PTA units may give such authorization only after they have been empowered to act for the membership of their unit.

Wise council leaders undertake projects that have the enthusiastic support of most of the local units. If sentiment for a project is not wholehearted, the council may decide to drop it. If a council undertakes a project on a majority vote, the dissenting PTA units may decide to go along with the majority, or they may simply refrain from participation. Member units may not be compelled to enter into council projects, nor may they be assessed for funds without consent.

Other examples of action that should be referred to the PTA units are proposed changes in council dues and any amendment to council bylaws.

### PTA a self-governing association

It is necessary to remember that the PTA is separate from the school district; it is an independent

association. The PTA is a voluntary group of citizens that acts in an advisory capacity to school boards, superintendents and principals (New York State Education Law). PTA may meet in a school, use school district facilities at no cost, have meetings noted on a school district calendar, and use school district communication media. But school district officers are out of line if they insist on what may or may not be printed in a PTA council or local unit newsletter, on what may or may not be addressed during a PTA meeting, or the use of PTA funds.

Only if the PTA self-governing status is clearly understood by both the unit and school district members will relations between the two be most productive.

### relationship with the school administration and the school board

*“The association shall work to engage and empower children, families, and educators within schools and communities to provide quality education for all children and youth, and shall seek to participate in the decision-making process by influencing school policy and advocating for children’s issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.”*

—National PTA Bylaws, Article III, b.

In bringing together local PTA delegates, teachers, school principals, the superintendent, school board members and council committee members at planned times, school district issues that are beyond the scope of a single PTA working alone may be solved.

This provides the opportunity to work together, network and form coalitions.

### cooperation with school administrators

Cooperation means working together for real benefit to children and youth. It does not mean being a rubber stamp. Legitimate cooperation may be fostered by:

- Monthly meetings between council executive board and the superintendent.
- Reports from administration at each council meeting.
- Offering to help with publicity and support for district projects that have been voted on by the membership.
- Researching the issue prior to taking a position.
- Being a barometer of community feeling and giving feedback to administration in an accurate, objective way.
- Drawing attention to, and being an advocate for, necessary changes.

These questions may help you assess your council’s work with school administrators and school boards:

- What efforts are you making to work cooperatively with school administrators? How are they included in council planning?
- What has your council done in the past year to cooperate with the school board to improve the school system? What can be done this year?
- Has your council served as a means of communication among the school board, the administration and the public? If it has not, how can this be initiated? If it has, can the relationship be strengthened?
- Do you have a representative attending and reporting on school board meetings?

## council activities, con't.

- Do you make or otherwise take advantage of opportunities to participate in policy-making groups?
  - Do you invite the superintendent or school board members to your council meetings?
  - In what ways has your council been an agent for changes in your school district?
- and community on behalf of children and youth. In short, there are guidelines for what a PTA or council may or may not do with respect to other organizations. The activity should:
- Promote PTA Purposes.
  - Support PTA policy.
  - Not be in conflict with state or national resolutions.
  - Not duplicate the work of local units.

### council's role in educational decision making

A council is a potentially effective agent of change in district education. Composed as it is of local units, it can represent a large number of people. How can it influence district educational decisions?

- Take the offensive, not the defensive; act, don't just react.
- Present good programs to units and community, keeping them apprised of educational issues.
- Take the superintendent up on his or her "my door is always open" invitation.
- See that a council representative attends school board meetings and reports to the council.
- Invite administrators to attend council meetings, as both presenters and audience.
- Encourage the school board to assign one of its members to attend council meetings.
- Meet regularly with unit presidents and the superintendent to discuss needs, present new ideas and keep an open line of communication.
- Seek positions on school planning committees, advisory boards and curriculum committees.

### relationship with other organizations and agencies

A council has a responsibility to unite the forces of home, school

#### Cooperation cannot include:

- Helping to raise money for other organizations.
- Helping with membership enrollment of other organizations.
- Contributing funds to finance the work of another organization (although a PTA may bear its share of the costs of a cooperative project).

The PTA may work with youth-serving organizations and character-building groups under the following guidelines:

- The PTA assumes no obligation (expressly or otherwise), responsibility or liability for the competence, actions or omissions of any person or persons who may have been or may become active as a leader, participant or otherwise in any organization or group sponsored by the PTA.
- No PTA representative may commit the PTA to join any other group or agree to abide by any other group's bylaws policies.

What is your council planning for community service projects?

Questions that may help direct your council leadership include:

- What can your council plan that will meet community needs?
- How can your council stimulate

local units toward community-wide activity?

- How can you help discover and develop leadership for community service?
- Are community projects part of your council program?
- Have you adequately assessed the needs of the community and how they relate to appropriate PTA activity?

### reporting back to the local unit

Meaningful communication between unit and council involves the firm commitment of both sides to share the responsibility for informing the PTA membership of council activities. Only in this way can the delegates be assured that the decision-making process adequately reflects the mutual needs and intentions of both groups.

For example, an article outlining the actions of the council should be included in every unit newsletter. The council delegates should make a report at every PTA meeting. A verbal report can be a short review of the plans, actions and achievements of the council. A written report can also be brief and should provide the information necessary to keep the executive board of the unit adequately attuned to the plans, actions and activities of the council.

Councils should have reports of the major activities of each member unit presented at each council meeting. PTA, as a grassroots association, relies heavily upon the communication of accurate information for good decision-making and teamwork.

# council programs and projects

## programs

The term program has two meanings for the PTA:

- 1) The total planned activity of the council.
- 2) The presentation for each meeting or special events scheduled throughout the year.

Not every council engages in all of these tasks. Council work is determined by the local situation and by the needs and interests of its member units. The activity should be in keeping with the PTA Purposes and support a state or national resolution.

## suggested programs

You might wish to get involved in the following:

- **Study Groups:** Curriculum, gifted and talented programs, juvenile justice, lunch programs, school closing or consolidation, school financing, special education, vandalism, violence and gangs.
- **School and Community Relations:** Candidates' forum and school budget.
- **Workshops:** Career and college education, family engagement and training for unit and council officers and chairmen.
- **Projects:** Cultural arts exhibits, directory of local agencies, recreation, scholarship and showcase of films.
- **Health:** AIDS, alcohol and other substance abuse education, health fairs, immunization, nutrition, school nurse and smoking.
- **Safety:** Bicycle, bus safety, crossing guards, playground, school building and traffic control.
- **Education:** New standards, testing, pre-K education, Special Education and school report cards.

## projects

In the past, various councils have undertaken successful projects. Here are some examples:

- A conference for parents to offer specific help to enhance their children's lives.
- Programs on specific topics such as child abuse, sexual harassment, bullying, use of social media, substance abuse, teen pregnancy, latchkey children, gifted and talented children, at-risk children, school absenteeism, vandalism, gangs, working mothers and Special Education.
- Information booth in a shopping mall to hand out PTA information.
- County-wide spelling bee and cultural arts day.
- Scholarship fund for graduating seniors, children with disabilities.
- Learning fair to heighten community and teacher awareness of some developing educational trends.
- Critical issues forum dealing with local needs.
- Parent awareness project to encourage parents and PTA to become involved with the decision-making process as it relates to children and education.
- Workshop on school discipline vs. student rights and responsibilities.
- School board candidates' night. Make sure all candidates are invited. Invite them early. Provide a practiced, disinterested and neutral facilitator.
- A project to encourage the improvement of reading.
- National PTA's programs (visit [www.pta.org](http://www.pta.org)).

## a note...

If your council has sponsored a great program, event, activity or speaker, please share the information with your region PTA.

Our network for information-gathering and sharing is immeasurably enhanced by new ideas!