

Principals & PTA

Georgia
PTA

everychild. one voice.™

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INTRODUCTION

Often principals work with PTAs without understanding what PTA really is. Sometimes, principals learn the role from other principals, the PTA leadership itself or by guessing their role. The intention of this document is to define the role and mission of PTA, increase the understanding of the partnership which exists between PTA and the principal and, ultimately, strengthen the partnership for the entire school community.

WHAT IS PTA?

National PTA is the largest and oldest volunteer child advocacy organization in the United States. A not-for-profit association of parents, educators, students and other citizens active in their schools and communities, PTA is a leader in family engagement and in reminding our nation and states of their obligations to children.

All officers and board members, whether national, state or local unit, are unpaid volunteers. All members speak with a unified voice on behalf of all children, as highlighted by the PTA tagline: *everychild. onevoice.*

Each school PTA (local unit PTA) is a self-governing unit, chartered by Georgia PTA and part of National PTA. Local unit PTAs are governed by the bylaws of their organization and may not act in any manner inconsistent with Georgia PTA and National PTA. Each local unit elects its officers, controls its local budget and is responsible for updating and amending their bylaws when necessary. National PTA and all of its constituent PTAs exist to fulfill the PTA mission and purposes.

NOTE: PTSA refers to those middle and/or high schools that recognize students as members. For the sake of this document, the governing body shall be referred to as PTA.

THE PTA PURPOSES ARE TO:

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding

PTA Vision - *Every child's potential is a reality.*

PTA Mission - To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA Values

Collaboration: We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.

Commitment: we are dedicated to promote children's health, well-being, and educational success through strong parent, family, and community involvement.

Accountability: We acknowledge our obligations. We deliver on our promises.

Respect: We value our colleagues and ourselves. We expect the same high quality effort and thought from ourselves as we do from others.

Inclusivity: We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.

Integrity: We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

STRUCTURE OF THE LOCAL UNIT PTA AND MEETINGS

Each local unit PTA consists of three levels: **Executive Committee, Board of Directors and General Membership**. The following section provides background information on each of these levels. For more information, refer to Georgia PTA's *Leadership Resource Guide* (LRG) and local unit bylaws.

EXECUTIVE COMMITTEE

The Executive Committee consists of:

- Elected officers of the PTA
- Principal of the school or appointed representative
- Appointed parliamentarian

The Executive Committee appoints the other members of the Board of Directors. The Executive Committee differs from the Board of Directors in that the General Membership elects officers.

What are the duties of the Executive Committee?

- Approve chairpersons and members of the standing committees
- Approve the plans of work of the standing committees
- Schedule board and association meetings
- Approve routine bills within the limits of the budget
- Conduct the business of the PTA between Board of Directors meetings
- Develop goals for the association for presentation to the Board of Directors and General Membership for approval
- Make a report of the Executive Committee action items at each board meeting

Why does the Executive Committee meet?

An Executive Committee meeting is a meeting of the PTA officers and the principal (or his or her appointed representative) and the appointed Parliamentarian. Dates of these meetings should be established at the beginning of the school year and are set by the PTA President, collaborating with fellow officers. Special-called meetings are permissible as set forth in the bylaws. The Executive Committee meets to set goals, make decisions and/or recommendations to submit to the Board of Directors for approval.

When does the Executive Committee meet?

Generally, this group meets monthly and at least before every Board of Directors meeting to discuss any issues which may need to be addressed by the Board of Directors. These meetings are at the discretion of the Committee and are not addressed in the bylaws of the unit.

Principal's role

As outlined in the bylaws, the Executive Committee of the PTA consists of the officers of the PTA and the principal of the school or a representative appointed by the principal to represent him or her. The principal or his/her designee is a member of both the Executive Committee and Board of Directors. These are the leadership decision-making bodies of the local unit.

The principal's ideas and actions can play a significant role in setting the tone and shaping the culture for the entire school. It is partly through the principal's support, motivation and leadership that a school community can promote strong family-school-community partnerships. The principal and PTA work together toward a mutual benefit for the school, with communication being the key to the unit's success.

school. As such, the principal is the direct liaison between the PTA membership and the school's staff. The principal should give a brief report at each Executive Committee and Board meeting about events, activities, status, etc., that are critical for stakeholder understanding.

GENERAL MEMBERSHIP OF THE LOCAL UNIT PTA

Who can be a member?

Members should include parents, the entire school staff (including administrators), businesses, neighbors and anyone who believes in the PTA mission and purposes. The general membership is all individuals who have paid dues to the local unit for the current membership year. Georgia PTA membership year is typically defined as July 1-June 30.

Do individuals have to volunteer in order to be a member?

Participation in PTA will vary greatly from member to member. Volunteers are welcome and can be a tremendous asset to a school community. However, being able to volunteer is not a condition for membership.

What are the privileges of membership?

All PTA members:

- Can participate in all PTA/PTSA meetings
- Have a voice and vote at local, state and National PTA meetings
- Are eligible to serve as an officer of a PTA
- Maintain membership in Georgia PTA and National PTA
- Are privy to informed and trained leadership
- Have a unified voice to influence legislation affecting children and youth
- Have the opportunity to work for the education, health, safety and welfare of children and youth at a local, state and national level

What are membership benefits?

PTA membership provides many benefits - some intangible and others tangible - to card-carrying PTA members. National PTA, Georgia PTA, many councils and local units offer a variety of "Member Benefits" to PTA members from businesses and organizations. Many of these benefits are seasonal or event-related, while others last for an entire membership year. It is important that all members regularly receive information about this expanding list of "Member Benefits," Visit Georgia and National PTA's websites for more information.

How does the local unit receive membership cards each year?

Every PTA unit can pick up membership cards for the upcoming school/membership year at Convention Leadership Training (CLT) during the summer, another important reason to be sure your PTA attends this important event.

If your PTA unit is not represented, the PTA president will receive information about procedures to obtain membership cards from the state office or district director. The number of membership cards given to each PTA at the beginning of the year will be a function of the number of members from the previous year.

What should the unit do with the membership cards?

Membership cards should be distributed to members as soon as they join a local unit PTA. PTA members should carry membership cards at all times. These cards verify that they are voting PTA members and can also be used to redeem PTA membership benefits at various cultural locations, events and businesses.

PTA BYLAWS

All PTAs are governed by the bylaws of the unit. All board members, including the principal, should be given a copy of the bylaws and be knowledgeable about them.

The bylaws:

- Are approved by the general membership and can only be amended by the membership at a general meeting, after proper notice of thirty (30) days has been given
- Outline the basic policies and practices of the unit
- Define the number of meetings and meeting months for the unit
- Outline the election of officers and their duties
- According to the bylaws, the principal is a member of the Executive Committee and therefore also a member of the Board of Directors
- Specify the dues of the local unit, (as well as the portions belonging to State and National PTA); any dues increase for the local unit requires a bylaws change

PTAs are governed by IRS code for 501c3s, the Georgia Code for nonprofits, their own bylaws, (which cannot conflict with Georgia PTA or National PTA bylaws), and then Roberts Rule of Order, policies and procedures contained in the Leadership Resource Guide and finally, any locally-established policies and procedures.

THE LOCAL UNIT PTA IN GOOD STANDING

A PTA UNIT IN GOOD STANDING:

- Adheres to the purposes and policies of the PTA
- Remits the national and state portion of dues monthly to the state office
- Maintains a current copy of approved bylaws on file with the state PTA
- Submits an annual audit report to the state office by the last business day of September
- Files the applicable 990 form with the IRS
- Pays council dues (if applicable)

If a PTA is *not* in good standing, neither the local unit nor students attending the school are eligible to receive awards and recognition given by Georgia PTA (e.g., membership awards, postsecondary scholarships, etc.), participate in business at the council, district or state level, or participate in Reflections.

PRINCIPAL'S ROLE

Communicate with the PTA Executive Committee regarding status of the local unit. The principal should support the PTA Executive Committee to ensure all deadlines are met. The principal may be included on communication from the council, district or Georgia PTA about missing items. When that occurs, the principal should communicate with the PTA leadership as to the current status of the issue and offer assistance as appropriate.

- Help parents stay informed on current issues in education and student achievement; refer parents to helpful books, magazine articles, radio or TV programs; and suggest materials to include if there is a parent resource center in the school or local library or school counseling office.
- Recognize PTA volunteers' efforts and appreciate the contributions of parents.
- Encourage constructive discussions with parents that build confidence in the school's leadership and strengthen parent partnerships.

HOW DOES THIS PARTNERSHIP BEGIN?

While the principal sets the tone or climate for family engagement, s/he can benefit greatly by working collaboratively with the PTA leadership to "walk the talk."

- First, the principal should be a PTA member, an active participant of the PTA Executive Committee and attend the Board of Directors meetings.
- Begin with open communication. The PTA president and principal should meet prior to the end of the school year to establish the "climate," "goals" and "shared vision" for the next year.
- Be a part of the assessment of the PTA programs and activities of the previous year. Help your PTA identify strengths and weaknesses before developing a plan for the upcoming year.
- Assist the PTA in setting its goals and objectives for the upcoming year, aligning programs and activities to support the school plan.
- Work with PTA leaders to establish the criteria for programs, events and/or fundraising activities. Help to ensure these activities support increased student achievement and align with the PTA goals and objectives as well as the school plan.
- Work with PTA to design a plan to educate parents on critical issues and to increase family engagement in the total school program.
- Ensure the school calendar of events is shared with the PTA and coordinate dates of the PTA programs and projects with the master calendar prior to communicating to the school community at large.
- Promote the benefits of PTA with the teachers and staff; encourage them to become members.

MAINTAINING A POSITIVE WORKING RELATIONSHIP

When educators, administrators and parents work together, they create a win-win situation for students. The PTA and principal must work collaboratively and be committed to support the education of all children in order to be described as successful. To maintain a positive working relationship, the principal and PTA should:

- Keep the primary goal of PTA on education and advocating for students rather than fundraising. The goal is to benefit **ALL** students.
- Collaboratively plan activities with PTA to accomplish specific goals.
- Develop programming that trains parents in the policies and procedures of the school and school district, informs them of current issues that influence delivery of instructional materials, federal/state laws that affect instructional programs and other topics as needed.
- Use regularly scheduled meeting times to discuss issues and concerns, review plans for events, keep each other informed, and continually assess the year.
- Maintain open, honest communication and work out any misunderstandings in a direct, honest way. Keep an open mind and as Stephen Covey says, "Seek first to understand, then be understood."
- Be positive and enthusiastic about the school.
- Develop a win-win attitude and celebrate each other's accomplishments.
- Keep things seen or heard in conferences or at school confidential. Encourage all volunteers to be sensitive to the ethical responsibilities regarding students and their privacy.
- Share available resources published by local unit, council, Georgia PTA and National PTA. Principals also have the opportunity to write articles for these publications that pertain to student achievement, family engagement and the vital role PTA plays in the overall success of the school.

FAMILY ENGAGEMENT

LEADERSHIP DEVELOPMENT OPPORTUNITIES OFFERED BY GEORGIA PTA

- **State Convention and Leadership Training (CLT):** Georgia PTA encourages members to attend the annual state CLT. Delegates participate in workshops and general sessions, elect officers for Georgia PTA in odd-numbered years, network and celebrate the accomplishments of PTAs from around Georgia. This is the most important training offered by Georgia PTA. A wide variety of workshops are offered for both new and veteran PTA leaders. We hope you encourage your PTA's leadership team to attend the yearly conferences. Training and associated costs are legitimate PTA expenses to budget and reimburse leaders for.
- **Advocacy Conference (Autumn):** It is important for PTA leaders and members to build a yearlong working relationship with state and local legislators and to understand both the issues impacting children and how education is funded in Georgia. At the annual Advocacy Conference, members learn to be effective advocates for children while participating in establishing the Georgia PTA legislative platform.
- **PTA Day at the Capitol (Winter):** This is an annual event when the state legislature is in session. PTA Day at the Capitol provides PTA leaders, members and supporters an opportunity to become more familiar with the legislative process and to speak with legislators about education and children's issues.
- **PTA Universities:** These are in-person training seminars on various timely subjects, from financial management to Reflections to family engagement. PTA Universities are offered at no cost and are held at the state office.
- **On-Demand Video Trainings:** Available through the Georgia PTA [website](#), these videos cover a wide variety of topics including basic duties of elected officers, filling vacancies, etc. Learn from your home. Additional courses are added regularly.

LEADERSHIP DEVELOPMENT OPPORTUNITIES OFFERED BY NATIONAL PTA

National Convention: The National PTA Convention is held annually in late June in a different region of the country. Workshops, nationally known leaders and speakers, an extensive exhibit hall and delegates from every level of PTA come together to conduct the business of PTA and to celebrate and network

Legislative Conference (held in Washington, D.C.): This conference affords PTA leaders an opportunity to hone and utilize their advocacy skills at the federal level.

E-Learning: All PTA leaders can grow in their personal leadership skills from the comfort of home by taking advantage of the e-learning courses. Log onto the National PTA Website at www.pta.org and participate in an e-learning course about team building, conflict management, grant writing, parliamentary procedures, etc. Additional courses are added regularly.

PRINCIPAL'S ROLE

The principal should be aware of the training being offered, encourage PTA leaders to attend training and participate when possible. The principal should also make recommendations to the PTA president regarding workshops that promote student achievement, advocacy, promote parent education and family engagement and encourage other staff members to attend or participate.

From time to time, a principal may feel that additional training might be helpful for the unit's leadership beyond the regular offerings. In that case, s/he should contact the council, district director or state office for assistance. Principals can also request a PTA officer at any level speak to faculty members about the work of PTA, current initiatives or programming, opportunities, or to offer special recognition and appreciation.

- Additional expenses, differences in revenues or a change in an approved expense require the budget to be amended. The budget may be amended by a vote of the general membership at any regular meeting or a special meeting called for that purpose. Refer to the *LRG* for more information.

Selecting Appropriate Fundraising Activities

The following questions should be used as a guideline for selecting and planning fundraising events. Usually one well-planned and orchestrated event will raise funds needed to support the goals and objectives set by the PTA for the year.

- Does the activity adhere to the PTA mission and purposes of PTA?
- Does the activity conform to the noncommercial, nonsectarian and nonpartisan policies set forth in the PTA bylaws?
- Does the activity not use or exploit children?
- Will the activity create and promote goodwill for the PTA?
- Is the type of activity one that can serve as a positive example for children and youth?
- Will the activity provide revenue to meet the goals?
- Did the Fundraising Committee provide a budget of expenditures, as required by the PTA's bylaws? (Cost of materials, advertising for the event, etc.)
- Do state and local governments require PTA to collect and remit sales tax?
- Are special permits needed such as special licenses or health permits?
- Is the liability of the PTA and its members protected through sufficient insurance or otherwise?
- Are contracts required and, if so, is the president willing to sign the contract for vendors and/or manufacturers? If using products, does the contract cover who is responsible for spoiled or damaged goods or unclaimed goods?
- Is the PTA using volunteers or does it pay or contract with workers?
- Have procedures been established to safeguard the handling of products and the money?
- What requirements, if any, are involved in using a specific facility? Is the facility accessible to people with disabilities and are the fire and safety precautions strictly enforced?
- Are there local, state or federal laws that apply to the activity and, if so, what care has been taken to ensure no law is violated?

Financial Requests Made by the School to PTAs

- When purchasing items for the school, the funds must be spent according to an approved budget, and the school must provide a purchase order or receipt to the PTA.
- It is the fiscal responsibility of the school system or district to provide for the curriculum and infrastructure needs of the students. PTA funds should never be used to provide curriculum materials, only support or enrichment items.
- All PTAs should use a formal process of allocating funds. Georgia PTA recommends two methods to decide how funds are spent. The Appropriations model and the Grants model are outlined in the Georgia PTA LRG.

CONTRACTS

The only person who may sign a contract, which legally obligates and binds the PTA, is the PTA president. This is true for all PTA business, such as fundraisers, book fairs, etc. Only the PTA president may sign and execute contracts, agreements, or other obligations in the name of the PTA. The principal may make recommendations to the Executive Committee regarding fundraising contracts and appropriateness with regard to school system regulations, but s/he cannot sign the contract or appoint/approve another designee to sign for PTA.

COMMON AREAS OF INTEREST

COMMUNICATION

The PTA president and principal (or her/his representative) should establish a communication line from Principal to President and vice versa. This line of communication is beneficial for many reasons. It will:

- Ensure principal is aware of all requests made to the PTA;
- Ensure PTA president is aware of all requests made to administration;
- Redirects conversation pertaining to PTA support to the executive committee and board of directors where requests should be brought forth and discussed.

USE OF SCHOOL FACILITIES

School property is government property. The use of school property is governed by policies established by the local school board. The general rule of thumb is that the school board must provide equal access to all outside agencies or no access to any group.

PTA INVOLVEMENT DURING THE SCHOOL DAY

The presence of PTA volunteers must follow local school policy with the approval and supervision of the principal, who has the legal duty to oversee the care and protection of the students. We suggest the PTA and principal develop a volunteer training process to ensure that PTA volunteers understand their roles, responsibilities and limitations.

PTA ACTIVITIES AND SCHOOL ACTIVITIES

It is important to understand the distinction between PTA activity and school activity, particularly in terms of liability or in order to determine whether a violation of state and/or federal law has occurred. Because PTAs are subject to lawsuits, PTA should take particular care when planning field trips, sponsoring intramurals, offering child care, etc. PTAs should determine whether the school system's liability insurance covers volunteers (and other third parties) who are on the school's premises. PTA volunteers sometimes are performing the same tasks as school employees and may be covered, and at other times are performing PTA functions and will not be covered. PTAs should carry general liability insurance to cover injuries that might occur at PTA sponsored events, as well as other types of insurance (bonding, directors and officers, property) to protect the assets of the organization.

ADVOCACY AND LEGISLATION

PTA, by definition, is an advocacy association and may support or oppose legislation that affects children. School personnel, as governmental employees, are subject to the Ethics in Government Act and may not support or oppose ballot issues (such as bond referenda and SPLOSTS) on school time. In these instances, PTA must ensure that its advocacy efforts are not attributable to school employees. The school/PTA newsletter is a common problem area. If school resources, including personnel time, are used to produce or distribute the newsletter, then care must be taken not to advocate on a ballot issue. PTAs should maintain membership lists so that members can be contacted directly by the PTA. Remember the Ethics in Government Act only applies to governmental employees and applies to influencing voters about an upcoming ballot issue. It has no relevance to encouraging the membership to write to an elected official about his/her position about an issue or about a piece of legislation.

VOLUNTEERS

The PTA consists of parents and community members who have volunteered time, energy and expertise to be advocates for and improve the lives of children. Generally, people who have been asked to volunteer are much more likely to do so than those who haven't been asked. The majority of volunteers are willing to do so for the right reasons. PTA officers and the principal should focus on asking school community stakeholders to volunteer and to be able to explain the benefits of volunteering. PTA officers and the principal should also be able to articulate volunteer opportunities that may not require a stakeholder to be physically present in to the building. Many parents and community members are unable to volunteer in the building, but these stakeholders are untapped resources and need to be included.

What Do Some of Georgia's Superintendents and Principals Say about PTA?

Dr. Frank R. Petruzielo, Retired Superintendent, Cherokee County School District

PTA provides the means for the most effective involvement by parents in their children's education. Through PTA, parents and community stakeholders can assist in ensuring that adequate resources, both financial and educational support (such as tutoring/mentoring at-risk students) is taking place at all schools and at all grade levels to benefit every student.

Every school in Cherokee County has a PTA. The Cherokee County Council of PTA plays a vital role with its assistance in dissemination of information relative to the local school district and legislation that directly affects Cherokee County. For example, PTA utilizes its resources to communicate, accurately and effectively, the outcomes of the many state/federal unfunded/underfunded mandates.

PTA also actively supports teaching and learning in suggesting that all parents supplement their children's education by taking part in at-home educational activities. If every parent spent just one hour daily directly participating in this aspect of their children's lives, it would quickly level the academic playing field for all students. Additionally, PTA helps us to identify those members of the community who do not have school-aged children so that they can volunteer their time and resources to tutor and mentor at-risk students.

Dr. Thomas B. Lockamy, Jr., Superintendent, Savannah-Chatham County Public School System

Support for PTA is a must for any school organization. Without district and school leadership that models support for PTA, the district fails to acknowledge the importance of parents and teachers working together for the betterment of students.

Dr. Carole Brink, Principal, Dickerson Middle School, Cobb County School System

As I reflect upon the incredible value of the PTSA, I can only conclude that this group of dedicated parents is simply paramount to the sound educational system at Dickerson Middle School. Parents involved in the PTSA are more responsive to the unique social, emotional and academic needs of each middle school student. PTSA parents also have a better understanding of the school curriculum, and are more likely to have a strong commitment to all of the school's needs and participate actively in discussions regarding political issues, school policies, academic content and appropriate student developmental milestones. The most important benefit of PTA involvement is to our star students. Students whose parents are actively involved in the Dickerson PTSA tend to display the highest aspirations, maintain strong academic achievement and display continuous self-discipline.

Mr. Cliff Cole, Superintendent, Paulding County School District

PTA's and PTSA's are integral to the success of individual schools and school districts. The mission of PTA is to make every child's potential a reality by engaging and empowering families and communities. While there are many groups supporting students inside our schools, no other group focuses their energy and efforts on the children, the families, and teachers of our schools. The inclusive nature of PTA allows an opportunity for any and all stakeholders in the education process to engage and advocate for our students. In my experience, supporting and engaging in PTA can positively impact the climate and culture of our schools.

Kathleen Chandler, Principal, Bascomb Elementary School, Cherokee County School District

As an experienced principal new to Bascomb, the PTA was responsible for making the transition to the school and community seamless! With their knowledge, hospitality, and generosity I felt such a sense of confidence in my new community. The PTA has provided educational and engaging opportunities throughout the entire year for our students, teachers, and all stakeholders! They serve all of our families with a giving heart. PTA is a vital component of school improvement!

Mr. John King, Principal, Bloomingdale Elementary School, Savannah-Chatham County School District

The power of the PTA is their lobbying and political strength. Schools, who work individually without the benefit of a parent organization that is associated with the PTA, are literally on their own if there are any concerns that need to be addressed by the school board or school system. The PTA is a strong voice for children in local communities and state houses. They can make things happen and force legislators to take notice of particular issues. In an era of low confidence in public education, teachers and educators need a voice that helps schools and students to be successful. The PTA is more than bake sales and fall festivals. It is more than parent volunteers and fundraisers. It is a nationally recognized organization that helps teachers, principals and, more importantly, students be the best they can be.