

Principal's Guide to PTA

PTA

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“Helping to Bridge the Gap – by Embracing, Engaging and Inspiring”

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A Principal's Guide to PTA

The purpose 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 to strengthen the partnership for the entire school community.

The Principal is the instructional leader within the building. The Principal sets the tone, the climate and expected professionalism for parent leaders and staff. The Principal is a member of the PTA, works with the PTA to address issues, helps to develop parent involvement programs and communicates with parents and the community through various mediums, such as the PTA newsletter.

The Principal, or his/her designee, is a member of the leadership/decision-making body of the local unit's Executive Board which includes officers and committee chairs.

The Principal and the PTA work together toward the mutual benefit of the school. The Principal should encourage the school staff to become PTA members and support the work of the association.

HOW PTAs WORK

- The PTA organization is a separate legal entity having both a Federal tax number (FEIN) and IRS 501(c) (3) tax-exempt status.
- Each local PTA unit elects a separate board and officers. Only the elected officers can contractually bind that unit, and only for their term of office.
- PTA budgets can only be ratified and approved by PTA members.
- PTA funds raised by PTA members belong exclusively to PTA and can only be used for purposes approved by its members through the budgetary and amendment process. Approved uses of funds should be in line with the mission and objectives of the PTA body as a whole.
- **WHAT PTAs ARE NOT** PTAs are not an additional funding resource for goods, services, and payroll for public schools. School funds should be supplied by governmental entities. PTAs advocate for the adequate funding of schools from governmental sources. They do not replace funds not supplied by governments (supplant) but rather should suplicate. PTA funds can NEVER go towards salaries.
- To do so jeopardizes the PTA's non-profit status. PTAs are not employers. PTA funds should not be spent on textbooks, office supplies, maintenance or school renovations or additions.
- PTAs are not to pay bills handed over by the principal of the school. If the school ordered it, the school pays for it.
- Teachers or members of the school system holding office in local units may not officially represent the school system on the PTA's board. Such an arrangement comprises a conflict of interest and will be used to demonstrate that the local unit is acting as a supporting organization.

WHAT IS THE PRINCIPAL'S SUGGESTED ROLE IN PTA?

- Be available. Work to make parents feel welcome and comfortable in school – the first step toward parent involvement.
- Be active in the PTA and encourage teachers to become PTA members and to participate, too.
- Help the PTA keep its primary focus on education rather than fundraising. The Principal and PTA can work together to solve problems and set goals that will benefit students.
- Help the PTA plan activities to accomplish specific goals
- Recognize PTA volunteers' efforts and appreciate the contribution of parents.
- Encourage constructive discussion 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 school climate for parent involvement, he/she can benefit greatly by working collaboratively with the PTA Leadership to “walk the walk”. First and foremost, the Principal should:

- Be a PTA member, an active participant of the PTA Executive Committee and attend the Executive Board meetings.
- Begin with open communication. The PTA President and Principal should meet prior to the end of the school year to establish the shared vision and goals for the next year.
- Be a part of the assessment of the PTA programs and activities of the previous year. Help your PTA to 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 all 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 insure these activities support increased student achievement and align with the PTA goals and objectives as well as the school plan.
- Communicate projects that are not fundraisers that are designed to help parents, advocate for students, or support the school's plan for student achievement.
- Work with PTA to design a plan to educate parents on critical issues, parent advocacy, and to increase parent involvement in the total school program.
- Insure the school calendar of events is shared with the PTA and coordinate dates of the PTA programs and projects with the school and district master calendars prior to communicating to the school community at large.
- Promote the benefits of PTA with the teachers and staff encouraging them to become members.

STRUCTURE OF THE LOCAL UNIT PTA AND MEETINGS

Each local unit PTA consists of three levels: 1) Executive Committee, 2) Board of Directors, and 3) General Membership. The following section provides the background information on each of these levels.

EXECUTIVE COMMITTEE

The Executive Committee consists of:

- Elected officers of the PTA
- Appointed Parliamentarian, if applicable

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 general association meetings;
- Develop a proposed budget;
- Conduct the business of the PTA between Executive Board meetings;
- Develop goals for the association for presentation to the General Membership for approval; and
- 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 appointed Parliamentarian (if applicable). Dates of those meetings should be established at the beginning of the school year. Should there be a need for a called meeting, the PTA Executive Committee, or by majority vote of the Executive Board as outlined in the bylaws, can set a special meeting. The Executive Committee meets to set goals, make decisions and/or recommendations to submit to the Executive Board for approval.

When does the Executive Committee meet?

These meetings are held at the discretion of the Committee and are not addressed in the bylaws of the unit.

Executive Board

The Executive Board consists of:

- Elected officers of the association
- Chairpersons of standing committees (Appointed*)
- Principal of the school or appointed designee
- Appointed Parliamentarian, if applicable

Each Local Unit PTA selects the committees needed at their school. The following committees are suggestions only:

- Reflections
- Budget
- Community Outreach
- Communication
- Programs
- Hospitality
- Legislation
- Membership
- Ways and Means

From time to time, other special committees will be formed for specific functions and a limited time period, such as Audit, nominating or special event committees.

What are the duties of the Executive Board?

- Transact necessary business in the intervals between association meetings and such other business as may be referred to it by the Association.
- Create or dissolve standing or special committees.
- Present a report at the regular meetings of the association.
- Select an auditor or an auditing committee to audit the treasury. Prepare and submit a budget for the fiscal year to the association of adoption.
- Approve routine bills within the limits of the budget.
- Fill all vacancies in office according to the by-laws

Please note that the Executive Board does **not** have the authority to make or authorize expenditures that are **not** in the budget.

Why does the Executive Board meet?

It meets to make decisions and set goals that will then be brought to the membership for their approval.

When does the Executive Board meet?

This group generally meets monthly, according to their by-laws. Committee reports and issues are addressed at these meetings. Individual local unit by-laws state provisions for additional meetings.

What is the Principal's Role on the Executive Board?

Attendance by the Principal at the Executive Board and General Membership meetings is critical to understanding the activities of the PTA and how these activities weave into the general school climate. The Principal works to insure that the PTA's mission and goals are working and aligned to the strategic plan of the 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

What is a General Membership meeting and who should attend?

A General Membership meeting is a meeting of all PTA members who come together to conduct PTA business. All PTA members are encouraged to attend these meetings.

Why do members meet periodically?

The General Membership meets to hear recommendations from the unit's PTA leadership and then to give approval or disapproval of the purposed recommendations. The PTA budget must be approved by the membership before any money can be spent. (See Dollars and Sense Section of the Florida PTA Kit of Materials for summer contingency information) To improve membership attendance, it is recommended that the PTA sponsor an event or evening held in conjunction with the school. Only those who are PTA members have voting privileges at the General Meeting. The unit should have membership cards on hand at General Membership meetings to promote membership.

When does the General Membership meet?

The number of meetings and months of the General Meetings are outlined in the by-laws of the local unit.

Where do PTA meetings take place?

General Meetings are normally conducted at the school. Most PTAs have their Executive Committee and Executive Board meetings at school as well, but occasionally some do conduct meetings off the school campus.

What does a typical meeting agenda include?

- Call to order
- Opening ceremonies (Pledge of Allegiance, flag ceremony, poem, song, or inspirational message)
- Reading and approval of minutes
- Report of the treasurer
- Letters or communications
- Report of the Executive Board
- Reports of standing committees
- Reports of special committees
- Unfinished business
- New business
- Program (a program is not required at every meeting)
- Announcements
- Adjournment

During appropriate times of the year, the following items should be included on the agenda and approved by the General Membership **NOT** by the Executive Board:

- Budget
- Budget amendments
- Election of the Nominating Committee
- Election of officers

What is the Principal's Role in the General Meeting?

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 parent-school-community partnerships.

The Principal should be an active participant at the General PTA meetings. By modeling the expectations, by being actively engaged in this vital partnership, parents, staff, and community will come to expect total participation in the school to promote student achievement and a healthy, positive school climate.

COMMON AREAS OF INTEREST

COMMUNICATION

The PTA President and Principal (or his/her representative) should establish the best method for two-way communication. (i.e., regular meetings, email, etc.). These communications are beneficial for many reasons. It will:

- Insure the Principal is aware of all requests made to the PTA;
- Insure the PTA President is aware of all requests made to Administration; and
- Redirects conversation pertaining to PTA support to the Executive Committee and Board meetings where requests should normally be made.

MONEY

PTA money belongs to the association and all decisions relating to PTA money must be approved by the General Membership. **PTA money *may not* be co-mingled with the money of individuals, the school or other organizations. The PTA *may not* allow school or other funds to "flow through" its checking account.** All money deposited in the PTA checking account belongs to the PTA and must be reported as income to the IRS.

FEDERAL AND STATE FILING REQUIREMENTS

ALL local unit PTAs MUST file a version of the 990 depending upon annual gross income and the state of Florida annual Solicitation of Donation form.

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 that the PTA and Principal develop a volunteer training process to ensure that PTA volunteers and Board members 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.

PTAs are subject to lawsuits. A PTA may never write a check for any school activity that will take place off of school grounds. Examples are buses for field trips, admission for students to field trip locations, payments to outside venues for events. The PTA may not put their local unit, county council, state or national organization of PTA in a position of liability for a child. The PTA *may* write a check to the school as a designated donation for any of the same services or events, for the school to make the payments on behalf of their students. A donation letter will accompany that check.

PTA INSURANCE

PTAs must carry general liability insurance to cover injuries that might occur at PTA sponsored events, and have options for other types of insurance to further protect the assets of the organization if they so choose. (i.e., bonding, property, officer protection coverage). District-mandated \$1M Liability Coverage is included in annual County Council dues.

SAYING THANK YOU

It is important to thank people for their hard work, participation, and commitment. Throughout the year, many PTAs provide treats, breakfasts, lunches, notes or small gifts of appreciation to remind school staff they are invaluable. Similarly, the school should show appreciation to its PTA volunteers. The gesture need not be large. It is truly the thought that counts. A simple thank you note to the PTA will help to reinforce their efforts.

How to Contact Miami Dade County Council PTAs/PTSAs:

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