**Checklist: How does your PTA measure up?**

A "no" means some training is needed; contact your council or district PTA.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Bylaws reviewed this year and are less than three years old</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Operating within PTA or policies</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Always have new officers, people do not switch back and forth between two positions, officers are not the same people every year</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Membership is growing every year, more than 15 members or 100% participation of teachers and staff</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>President/officers regularly attend council/district meetings/trainings</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Unit is in Good Standing, has not had its Charter withdrawn</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Meetings are held as scheduled in the bylaws, not moved or cancelled without required notice</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Treasurer’s reports are provided at every executive board and association meetings.</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Reports given in writing with questions being answered satisfactorily</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Treasurer’s reports list categories with sufficient detail.</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Treasurer attends all meetings</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Bank statements sent to the school, not treasurer’s home address</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Two people always count money, always use cash verification sheets</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Two officers always signing checks and required officers, per bylaws on bank signature card</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Blank checks are never signed</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Receipts always attached to Authorizations for Payment</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Audits performed as scheduled, at least twice a year, forwarded to council/district</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Treasurer/chairman able to report how much money each fundraiser made and each event cost</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Budgets, yearly calendars approved by membership and forwarded to council/district, taxes/RRF-1 filed annually and on time</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Bank statements are reviewed monthly by a non-check signer</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Parents, teachers, or principal are well informed about PTA activities.</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Treasurer is familiar with unit bylaws, authorization procedure</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Treasurer writes all checks after appropriate signatures received on payment authorization form</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Per capita/insurance paid as received, at least monthly by due date</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Minutes for every meeting, contain details especially on financial decisions and use of funds</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Year-end audit is available upon request</td>
</tr>
</tbody>
</table>

**Additional Sticky Situations**

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>No school staff member as treasurer or president.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Principal who wants projects funded goes through the process set up by the PTA</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Principal respects purposes, procedures and mission of the PTA to do what the membership approves, not what the principal wants</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>Fundraising projects never benefit a board member financially</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>PTA does not pay for aides or specialists one year and then expect/obligate next year’s board to do the same</td>
</tr>
</tbody>
</table>
7 Secrets to Drawing HUGE Crowds to Your PTA Meeting

Summary of workshop at 2012 NPTA Convention (permission granted to print)

Presenters:
Amy Lang, Birds and Bees and Kids – amy@BirdsandBeesandKids.com, and Kim Estes, Savvy Parents Safe Kids – kim@savvyparentssafekids.com

Presenters opened with the statement “involvement=money.” Initial planning steps should include a review of the past meeting schedule. Select 3 to 4 options where something fun can be incorporated into the meeting. Surveys play an important role. Collect door prizes, food and fun items before school starts.

1. **Identify barriers**: Know what keeps parents away. These can include childcare, meeting notification, work/traffic issues, sports/meal time, uninteresting topics, language/cultural barriers, parents feel inadequate, parents feel unwelcome or excluded, timing of meeting.

2. **Market**: Know what you are selling. Be attractive to parents, sell involvement in new ways. Parents don’t understand what PTA does – spell it out. What do you do for children? What do you do for parents? **How, where and when do you market?** Identify your audience – if mommies are 98% of your current audience, don’t spend all your resources marketing to dads. Communicate at the sixth grade level. Use email and paper – parents do look in backpacks. Promote where parents gather; promote consistently.

3. **Be friendly**: Know how to get them in the door. Be welcoming to everyone. Use all methods, especially personal invitations, name tags, and introductions at every meeting.

4. **Be fun**: Know how to keep them coming back. Tap into kids’ talent, local agencies, teacher activities with kids. Use drawings for prizes, kids’ art shows, concerts. Keep the PTA meeting short – 15 to 30 minutes maximum. Always provide (healthy) food/drinks, door prizes.

5. **Bring in a speaker**: Know how to make their lives better. Use a survey to identify topics. Questions to ask speakers include: fee, availability, equipment needs, cancellation policy, and availability of promotional posters or marketing materials.

6. **More marketing**: Know how to keep promoting. Use another catchy name besides PTA MEETING. Plan out the email/print/flier/electronic marquee schedule. Hang posters on school entry doors. Ask a Dad/Mom to build a PTA sandwich board to place in a visible area – before/after school pick-up line.

7. **Engage them**: Know how to keep the momentum going. Use evaluation sheets. Ask others to become involved making jobs “small bites” which lead to larger roles.

Resources
Positive Discipline Association www.positivediscipline.org
Parent Learning Link www.parentlearninglink.com
MamaCon Inspiration and Tools for Modern Moms www.mamcon.net
TYPES OF PTA MEETINGS

For each PTA, various groups are assigned specific functions and each group has particular authority to act and fulfill the assigned obligations.

PTA bylaws specify the frequency of executive board and association meetings, how special meetings may be called, and the quorum requirements.

ASSOCIATION:
The association is the voting body for all action taken, including adopting bylaws, adopting the program and the budget for the year, electing the nominating committee, electing officers and approving all contracts to be signed and all expenditures. PTA members vote at an association meeting.

EXECUTIVE BOARD:
The PTA executive board consists of the elected and appointed officers, the principal, the teacher representative and the committee chairmen. The executive board meets every month to handle the transaction of necessary and detailed business between meetings of the association. The executive board is responsible for accepting and studying recommendations to be presented to the association for approval. The bylaws provide details about the executive board’s responsibilities.

Guests may be invited to attend an executive board meeting as well as a meeting of the membership. A courtesy seat is granted by the president to the guests present. A guest may bring information to be shared with the group. However, guests do not participate in discussion or voting and should leave after their information is relayed.

COMMITTEES:
A committee may be a standing committee with regular, ongoing responsibilities during the PTA year or it may be a committee organized for a short-term activity only. Committees meet to make recommendations to the executive board concerning the assigned activity. A guest may be invited to a committee meeting to present information.

MINUTES:
The meetings of each PTA group should be preserved through the recording of minutes. Each group’s meeting is different and different minutes are required.

The board meeting cannot be combined with the association meeting.
Tips for Effective Board Meetings

It is important to value people's time and make the best use of the time available when the executive board meets. Use these tips to have effective board meetings.

- Stick to the scheduled dates and times stated in the bylaws and which are published in the PTA calendar for the year.

- Always start the meeting on time. Make every effort to respect other people's time by ending the meeting at the agreed upon time.

- Prepare and send out the agenda before the meeting to provide advance notice of pending actions and to remind members of items to be prepared to discuss.

- Create an attendance list for attendees to sign or initial. Illegible writing is avoided and it helps in determining whether there is a quorum present. Think about adding a space for volunteer hours so each member can provide his/her volunteer hours on a regular basis.

- Make your agenda a working document. Try including start times for each item. For example: 6:30 Welcome, 6:35 Minutes of Previous Meeting, 6:40 Treasurer's Report etc. Use the scheduled times to keep things moving along.

- Follow parliamentary procedure when chairing a meeting. It helps prevent people from monopolizing the discussion time and assures that control is maintained.

- Ask committee chairmen to report briefly by presenting committee recommendations to the executive board. Detailed planning is done ahead of time by the committee and the executive board then approves the committee recommendation or refers the issue back to the committee for further work.

- Ensure that the secretary takes minutes at every meeting. Ask the secretary to send a draft set of minutes out no later than one week after the meeting to assure that members have the opportunity to assess accuracy while recollections are fresh and to serve as a reminder of assigned tasks.

- Attach a list of action items to the minutes with expected dates for completion and the person responsible to serve as a reminder to all of the expectations and responsibilities undertaken.
PTA Programs

Build strong family-school partnerships

Research shows that engaged parents make a difference and ensure their child’s overall success. With family engagement, students are more likely to perform better in school, earn higher grades, pass their classes, attend school regularly, have better social skills and go on to postsecondary education.

Create PTA programs to fit your school community needs, encourage family engagement and build strong family-school partnerships.

Six National Standards for Family-School Partnerships

An easy way to keep this big picture in mind is to rely on the National Standards for Family-School Partnerships. When planning a program, ask yourself, how will our program reflect our commitment to:

- **Standard 1: Welcoming All Families:** To make families feel welcomed, valued and connected to each other and the school

- **Standard 2: Communicating Effectively:** To offer effective communication between parents, schools and parent groups

- **Standard 3: Supporting Student Success:** To encourage parent involvement to heighten student achievement

- **Standard 4: Speaking Up for Every Child:** To become an effective advocate for children and their education

- **Standard 5: Sharing Power:** To share power between families, students, teachers, school staff and the community

- **Standard 6: Collaborating With Community:** To connect the school with the community

As a framework for how families, schools and communities work together to support student success, these standards offer useful benchmarks to plan your programs.

For more information and resources, download *The National Standards for Family-School Partnerships Implementation Guide* at [www.pta.org](http://www.pta.org)
10 quick tips – planning PTA programs

PTA programs and activities are an excellent way to share information and experiences that build community engagement. Here are a few tips to maximize your success in planning dynamic PTA programs.

- **Survey** – Identify the needs and priorities of your school community by conducting surveys of students, parents, teachers and administrators.

- **Brainstorm** – Get together and brainstorm ideas on what programs and activities might work best for your community. Talk about what you want to accomplish: for instance, do you want to increase parent engagement, promote healthy lifestyles or showcase student talent?

- **Set S.M.A.R.T. Goals** – Identify the main goal of your program. Check to see if it’s Specific, Measurable, Attainable and Agreeable, Relevant and Timely.

- **Create a Timeline** – Plan far enough in advance to be on the school calendar. Make sure there are no conflicts with other school or community events or holidays.

- **Follow Guidelines** – Check with the principal, superintendent and community center to ensure that the event/program is allowed. Don’t forget to submit a facilities use agreement. Check the Insurance Loss & Prevention Guide for red/yellow/green activities.

- **Budget** – Consider all costs of your program or activity – speakers, food, supplies – before setting the budget.

- **Research All Funding Sources** – Stipulate a particular fundraiser for the event or program. Seek out business sponsors, either for funding or in-kind donations.

- **Promote** – Publicize your program or activity using all media available including flyers, backpack express, news releases, PTA newsletter, website, email blasts and social networking.

- **Participate** – Recruit lots of volunteers to work the program or event in short shifts so that everyone has a chance to actively engage in the planned activities.

- **Evaluate** – Take time to talk about what worked well and what might be tweaked to work better next time. Was there enough participation? How well did your outreach efforts work? Did you reach your goal?
Programs and activities to grow student success

Initiate and run a variety of programs, activities and events to boost academic achievement, health/safety and family engagement

**Academic Achievement**

- Breakfast Book Club
- Drama Festival
- History Detectives Night
- Spelling Bee
- Math-a-Thon
- Robotics Team
- Book Swap
- Talent Show
- Homework Help Night
- Multicultural Festival
- Science Fair
- Poetry Slam
- Campus Chalk Drawing
- Summer Jobs Fair

**Health/ Safety**

- Field Day
- Safe Routes to School
- Internet Safety
- School Garden
- Recycling - 3Rs
- Lunch Time Walking Club
- Bicycle Rodeo
- Red Ribbon Week
- Fun Run
- Student Panel on Teen Depression
- Walk to School Day
- Health and Safety Fair
- Nutrition and Cooking Assembly
- Drug and Alcohol Awareness
- Driving and Cell Phone Safety
- Anti-bullying Awareness Program
- 40 Developmental Assets Program

**Family Engagement**

- Teen panel on campus safety
- Turn off TV Week
- Pal-O-Grams and Merry Messages
- Random Acts of Kindness Awards
- Student of the Week

- Back to School BBQ
- Family Sock Hop
- College Readiness Forum
- Family Fun Night Dinner
- Flea Market Giveaway
- Family Bingo Night
- Neighborhood BBQ
- Family Fitness Night
- Movie Night
- Coffee Mornings
- Family Math Night
- Sports Equipment Exchange
- Family Potluck
- Take Your Family to School Week
- Family Science Mystery Night
- Family Art Night
- Donuts for Dads
- Muffins for Moms
- Grand-pals Tea
- Ice Cream Social
- Story Telling Night

The Communicator - 2012
PARTNERING IDEAS FOR PTAs

A great way to experience growth in membership and in stature is to hold events with local businesses and organizations.

Listed below are a few events hosted by PTAs to boost recruitment efforts.

<table>
<thead>
<tr>
<th>EVENT</th>
<th>BUSINESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bike safety rodeo</td>
<td>Insurance companies</td>
</tr>
<tr>
<td>Community development</td>
<td>City council</td>
</tr>
<tr>
<td>Read-a-thon</td>
<td>Local libraries</td>
</tr>
<tr>
<td>Safety: traffic, home, school, playground</td>
<td>Local police and fire departments</td>
</tr>
<tr>
<td>Educational fair</td>
<td>Community groups with expertise in dance, crafts, storytelling, and science</td>
</tr>
<tr>
<td>Info share</td>
<td>Any local organizations and businesses</td>
</tr>
<tr>
<td>Literacy program</td>
<td>Senior citizen groups and local libraries</td>
</tr>
<tr>
<td>Public service announcements</td>
<td>Local radio or television stations</td>
</tr>
<tr>
<td>Work fair/career day</td>
<td>Area businesses</td>
</tr>
<tr>
<td>Discount incentives for members</td>
<td>Area businesses</td>
</tr>
<tr>
<td>Health and safety fair</td>
<td>Area health groups</td>
</tr>
<tr>
<td>Forum on special needs children</td>
<td>Assistance groups for people with disabilities</td>
</tr>
<tr>
<td>Adopt-a-grandparent program</td>
<td>Retirement homes, senior citizen groups</td>
</tr>
<tr>
<td>Mentoring programs</td>
<td>Business leader groups, other service organizations</td>
</tr>
<tr>
<td>Storytelling</td>
<td>Retirement homes, senior citizen groups</td>
</tr>
<tr>
<td>Tutoring program</td>
<td>University/college student organizations</td>
</tr>
</tbody>
</table>

Taken from National PTA’s Membership Recruitment and Retention Manual (on their Membership Marketing Templates and Tools CD)
The Communicator - July 2008
SAMPLE INTEREST SURVEY

To: Parents, Students, Staff, and Friends of ABC PTA
From: The PTA Program Committee

We need your help to plan next year's programs. Please complete this form and return to ABC PTA by ___________ (Date).

I am interested in:

☐ What is taught in school
☐ School testing
☐ School and community activities for children
☐ Family health and safety
☐ Financing public education
☐ Influences of mass media
☐ New teaching methods
☐ Parent Education courses
☐ Other: _________________________________

Please call me about the possibility of volunteering at ABC School:
☐ Serving on a committee
☐ Assisting with hospitality
☐ Giving specialized help with:
  ☐ Clerical work     ☐ Telephoning
  ☐ Youth Activities ☐ Fundraising
☐ Other: _________________________________

We thank you, and may we have your

Name________________________
Address _______________________
Telephone______________________
Helping Our Kids - Helping Our School

Won’t You Join Us? The PTA/PTSA requests your assistance so we can work together in support of our students and school.

We know that our children learn from adults who care about them. Giving of your time, your talent and ability will not only help our school but will enhance our children’s learning. Please join us in volunteering where your time allows.

Return volunteer form to:

☐ I would like to be a Room Representative for my child’s room:
   Student’s name ___________________________ Teacher ___________________________

☐ I would like to work with the PTA/PTSA. Please call me.

☐ I am willing to tutor children who need extra help in:
   ☐ reading (grade level ________)
   ☐ math (grade level ________)  ☐ other (__________)

I am interested in helping with:
   ☐ Career Day
   ☐ Multicultural Week/Day
   ☐ Red Ribbon Week
   ☐ Science Fair
   ☐ Holiday Fair
   ☐ Other
   ☐ Book Fair
   ☐ Field Trips

I would like to help with:
   ☐ science
   ☐ filing
   ☐ phoning
   ☐ cutting projects
   ☐ computers
   ☐ typing
   ☐ stapling
   ☐ classroom book orders
   ☐ library
   ☐ coping
   ☐ homework

Special talent or interest ___________________________________________

The best time to reach me is ________________________________________

Name ___________________________ Phone (home) ______________________
Address ___________________________ Phone (work) ______________________
City ___________________________ Zip Code __________ E-mail ____________

Other samples of surveys may be found in the California State PTA Parents Empowering Parents (PEP) Manual.
It is important for every PTA/PTSA to regularly evaluate their efforts. Surveys can be an excellent tool. Below are ideas that your PTA/PTSA may want to consider for a membership survey/assessment.

<table>
<thead>
<tr>
<th>How many PTA events have you participated in during the last 12 months?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ None</td>
</tr>
<tr>
<td>☐ One to three</td>
</tr>
<tr>
<td>☐ Four to six</td>
</tr>
<tr>
<td>☐ Seven to nine</td>
</tr>
<tr>
<td>☐ 10 or more</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How well did the events meet your expectations?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Very well</td>
</tr>
<tr>
<td>☐ Well</td>
</tr>
<tr>
<td>☐ Satisfactory</td>
</tr>
<tr>
<td>☐ Not well</td>
</tr>
<tr>
<td>☐ Not at all well</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Why did you participate in the events?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Volunteered at event</td>
</tr>
<tr>
<td>☐ Wanted to bring my family</td>
</tr>
<tr>
<td>☐ Wanted to learn about topic</td>
</tr>
<tr>
<td>☐ Brought by friends /other parent</td>
</tr>
<tr>
<td>☐ Appreciated the topic</td>
</tr>
<tr>
<td>☐ Other_________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What prevented you from participating (more):</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Time</td>
</tr>
<tr>
<td>☐ Money</td>
</tr>
<tr>
<td>☐ Unaware of events</td>
</tr>
<tr>
<td>☐ Not interested in offering</td>
</tr>
<tr>
<td>☐ Other_________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How would you rate the quality of the events/programs of this PTA?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Excellent</td>
</tr>
<tr>
<td>☐ Very good</td>
</tr>
<tr>
<td>☐ Good</td>
</tr>
<tr>
<td>☐ Fair</td>
</tr>
<tr>
<td>☐ Poor</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What programs are we not doing, that our PTA should host?</th>
</tr>
</thead>
<tbody>
<tr>
<td>________________________________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What is the number one reason you join/remain a PTA member:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Community/school pride</td>
</tr>
<tr>
<td>☐ Help my child/children</td>
</tr>
<tr>
<td>☐ Positive volunteer role model</td>
</tr>
<tr>
<td>☐ Access to programs from PTA</td>
</tr>
<tr>
<td>☐ Leadership opportunities</td>
</tr>
<tr>
<td>☐ Friendships</td>
</tr>
<tr>
<td>☐ Place where I can make a difference</td>
</tr>
<tr>
<td>☐ Helps all children</td>
</tr>
<tr>
<td>☐ Recognition for efforts</td>
</tr>
<tr>
<td>☐ State and National PTA materials</td>
</tr>
<tr>
<td>☐ Price</td>
</tr>
<tr>
<td>☐ Pressure from other parents</td>
</tr>
<tr>
<td>☐ Other____________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What would make your membership more valuable?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ More programs</td>
</tr>
<tr>
<td>☐ More support (equipment, scholarships)</td>
</tr>
<tr>
<td>☐ for students</td>
</tr>
<tr>
<td>☐ Membership discounts</td>
</tr>
<tr>
<td>☐ Other ____________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How likely are you to renew your membership next year?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Very likely</td>
</tr>
<tr>
<td>☐ Likely</td>
</tr>
<tr>
<td>☐ Somewhat likely</td>
</tr>
<tr>
<td>☐ Not likely</td>
</tr>
<tr>
<td>☐ Not at all likely</td>
</tr>
</tbody>
</table>
It is important for every PTA/PTSA to regularly evaluate their efforts. Surveys can be an excellent tool. Below are ideas that your PTA/PTSA may want to consider for a membership survey/assessment.

Dear Member of the [School name] Community,

The PTA/PTSA needs your help. In order to meet the needs of the staff, our students, and their families, we must periodically evaluate our programs and services. Please take a moment to complete this survey and return it to the PTA/PTSA in [School name]'s front office. We value your opinion.

Thank you.

[School name] PTA/PTSA

Do you believe the PTA/PTSA communicates effectively with the students, families, and faculty at [School name]? _______Yes _______No
If you answered "no", please tell us how we could communicate with you better.

Did you join the PTA/PTSA at [School name] this year? _______Yes ________No
If you answered "no", please indicate why.

Did you join the PTA/PTSA last year? _______Yes ________No
If you answered "yes", please indicate why you did not re-join this year.

The PTA/PTSA sponsors or assists with many programs and events, including (the following are examples): School Pictures, the yearbook, PTA/PTSA dances, the school candy sale, Fall Festival, Transition Nights, Kids Day, Red Ribbon Week, PTA Clothes Closet, the Book Fair, Student Recognition, 6th Grade Science Camp, 8th Grade Special Events, and Reflections.
Were you aware of all or most of these programs? _____Yes _____No

Using a scale of 1-10 where 1 = poor, 5 = fair, and 10 = excellent, how would you rate the overall programs and services the PTA/PTSA provides:

1  2  3  4  5  6  7  8  9  10

In your opinion, what is the best program or service the PTA/PTSA provides and why?

Can you suggest ways in which the PTSA can improve or enhance our programs and services?

Are there any programs or services you would like to see the PTSA add? Please describe them.

Please use the space below to provide any additional comments or suggestions. If you would like to be contacted by a PTA/PTSA Board member, please include your name and phone number.
GOAL SETTING

WHY?  Goals set direction, provide purpose & accountability, outline roadmap/destination. Goals provide direction and focus for the individuals as well as for the team buy-in. Allows group & individuals to be more efficient and more effective.

WHO?  Widest possible population = ownership, the whole team (not one individual) With input from those who will do the work and those who will be affected.

WHAT? A goal is a destination. Defines the role of your PTA. It should answer the question of who we are and what we want to accomplish. It is a written, relevant, attainable, observable, broad statement of a desired end. Goals reflect the mission of the group and give common focus to group's efforts.

Goals ➔ Objectives ➔ Action Plans/Activities ➔ Evaluate

How to get started:
Use Brainstorming for Goals
- Use facilitator from outside group
- Everyone participates, one at a time
- One item proposed each turn, can pass
- Recorder records each statement
- No wrong answers, no debate
- Work till all members pass or time is up
- Each person can advocate for or against an item
- Facilitator helps find common threads to combine
- Group can rank items with value of 1-3
- Highest ranking item is group's consensus

Goal Setting Process

1. Determine the PTA's role
   What do we want to do?

2. Evaluate current services/resources

3. Assess needs
   What do our membership and communities see as ways we can fill the role we have identified? (needs assessments/surveys)

4. Set goals and objectives in priority order
   Where will we go? What will we do?

5. Develop action plan/activities
   Includes the steps and resources needed

6. Monitor and evaluate
Goals ➔ Objectives ➔ Action Plans/Activities ➔ Evaluate

GOALS should include:

- Who are you? (define your role)
- What will you provide? (what have we done, what should we do)
- What do you want as a result? (where do we want to go/want to see happen?)
- How will you get that result?

Example: *The ___ PTA will*

______________________ (#1-one or two action words about what you will do)
______________________ (#2- what/or for whom)
______________________ (#3- action word and achieve what result)
______________________ #(4- what will you do to ensure that you get #3)

*The California State PTA will empower (#1) districts (#2) to develop effective leaders (#3) by providing the essential resources, training and support in a pro-active manner (#4).*

OBJECTIVES are needed for each goal.

- These are specific actions to reach your goal.
- They should be explicit, measurable, concise and clear.

Example: *Provide leadership training statewide for 100% of our Districts.*

ACTION PLANS/ACTIVITIES should be developed for each objective.

- These explain the steps and resources needed to meet the objective(s). Activities must relate to an objective,
  - include the action that will take place,
  - who is assigned to do the tasks,
  - what materials and resources are needed,
  - when actions are to occur (any due dates?)
  - how reports of progress are to be made

Example: *PTA U, Field Services* (each would have steps and resources needed)

EVALUATE at mid term and end of term.

- Set a specific method for evaluation. Determine who will take responsibility.
- Anything need to be changed? Was goal met?
- Questions that can help evaluate the effectiveness of a goal or a project:
  - Did it implement at least one of the purposes of PTA? or relate to PTA's mission?
  - Did it meet the needs of the community?
  - Did it involve members/Was it interesting or helpful to them?
  - Did it give us some useful information?

Goals need to be smart.

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**elevant
- **T**ime bound

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2014 California State PTA Convention 14 F5 - Remodel Your PTA
Strategies of a Successful Team Leader

The holding of a leadership position does not always mean that the leader will be involved in all activities. Instead, leadership often requires the surrender of one’s own wishes and letting the group decide as well as great amounts of patience.

Consider the following suggestions:

• Always remember that whatever authority you have comes from the job and not from the person. You are the temporary holder of your position of responsibility.

• Remember that there probably isn’t any single best way to do anything. The thought may jolt you a bit; progress will come only because, one day, a better way to do something than yours will be found.

• Surround yourself with people who are knowledgeable about the organization. The more everyone knows, the better your organization will function – and the less likely big mistakes will happen.

• Listen. Make it easy for people to talk to you. Don’t assume you know what the problem is. Ask them to tell you.

• Find out what your team members do best. Delegating authority is an extremely important aspect of leadership. Effective delegation can save time and energy, provide diversity in approaches and promote efficient use of human resources.

• Load your team members with challenges and responsibilities. Do it as soon as possible.

• Give them ample credit for accomplishments. Let them have no doubt their work is appreciated.

• Expect that their competence will be discovered.

• Do whatever you can to support the efforts of other volunteers, wherever they may be in your organization. If you want people to help you, you must help them.

• Effective leaders must recognize that no one-leadership role will be appropriate at all times. Leadership roles must suit the situation as well as the needs and preferences of the team as well as the leader. Remember to remain flexible enough to switch roles if necessary.

Summer 2013 Communicator
REMODEL your PTA

Identify the Issues

- “We’ve always done it this way”
- Same people do everything
- Poor attendance
- Stagnant membership
- No new leaders

Does your PTA do the basics?

- Follows bylaws
- Required officers
- Membership
- Financial obligations
Basics continued...

- Meetings
- Plans to meet goals
- Works as team
- Communicates

Is your PTA relevant?

Customize it by understanding and addressing the interest, needs and values of your community.

Meeting “needs” increases involvement

- Programs
- Partnering
- Information
- Connecting
**Why do people get involved?**

- Worth their time
- Value from involvement
- Positive impact results

**What messages are sent?**

- School environment
- Communication
- Special events
- Cultural practices
- Community perception

**What hinders involvement?**

- Cultural Differences/Language
- Time
- Not understanding system/jargon
- Not Knowing How
Feeling Unwelcome
Not Feeling Valued
Not Being Part of the Clique

**Why do people stay or leave?**

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**Increasing involvement**

Retain current volunteers
Find new ones & potential leaders

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**Get Input and Feedback**

- Surveys
- Evaluations
Review, set, plan

- Review input
- Resources
- Set Goals
- Create a plan

Evaluate and adjust

- Promote
- Evaluate
- Adjust

Change is healthy

- Communicate using multiple methods
- Hype your meetings and events
- Ask for help and delegate
- Need to understand community’s needs
- Goals should be set to keep the focus
- Educate about PTA
What is something you learned today that you are taking back to change?

Thanks for all you do... and for joining us today!

It's QUESTION TIME!!