



**WORKING EFFECTIVELY
AS A PARENT TEACHER
ASSOCIATION (PTA)
HANDBOOK**



**Working effectively as a Parent Teacher
Association (PTA)**

HANDBOOK

**As Amended and Approved
by Vote of the Members,
June 2015**

Using this handbook

These guidelines have been developed in consultation with members of the Parent Teacher Association (PTA), the Principal and Vice-Principal of the EIS.

In this publication both new and experienced PTA members will find information and guidance to assist with the establishment and smooth running of the EIS Parent Teacher Association. PTA members of the EIS must conduct their business in accordance with these guidelines.

We recommend that PTA members discuss these guidelines, so that they have a shared understanding of the important partnership role the PTA plays in the school.

EIS Parent Teacher Association

First edition 2015

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Chapter 1 PTA Charter

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Chapter 1—PTA Charter

Parent Teacher Association (PTA) Charter

The PTA is a highly valued organization that exists to support ongoing school improvement via fundraising and awareness campaigns. The PTA is led by a President, Vice-President, Secretary and Treasurer. The PTA shall endeavor to:

1. Raise the profile of the school, its students, staff and Board of Trustees via event leadership, internal and external communications, and fundraising;
2. Support the school, its students, faculty, administration and the Board of Trustees in all its endeavours both publicly and during PTA meetings;
3. Strive sincerely to continuously improve relationships and work as a team with one another and the leadership of EIS;
4. Seek agreement with the school leadership in order to initiate and administer all PTA-sponsored events and campaigns;
5. Be available to promote and support the work of the school and its employees;
6. Take a collaborative approach when contributing to school matters;
7. Publicly support decisions of the group after honoring the right of individual members to express opposing viewpoints;
8. Express all concerns of a sensitive nature with people involved face-to-face;
9. Give careful consideration to all issues brought forward by individuals and particular groups of people;
10. Ensure formal meetings follow only the agenda;
11. Record and publish minutes from all formal meetings for all staff and parents at EIS;
12. Ensure that a staff representative is always present at a formal PTA meeting;
13. Initiate promotional events and campaigns in an effort to support the continuous school improvement;
14. Promote and advance the cause of internationalism in education;
15. Make decisions as a PTA only at properly called meetings. PTA members recognize that individual members have no authority to take individual action in policy or in school administrative matters;
16. Attend regularly scheduled PTA meetings unless a situation occurs that makes attendance impossible;
17. Listen carefully, with courtesy, to others and give others equal opportunity to speak during meetings;
18. Cast a vote on all matters except when a conflict of interest arises;
19. Review, revise the PTA charter on a yearly basis, as appropriate, for submission and final approval of the administration of EIS;
20. Participate in annual, formal self-assessment of the PTA's performance.



Chapter 2

Support for Parents



Chapter 2 – Support for Parents

The Parent Teacher Association (PTA) should be a structure that actively supports parents and teachers to ensure the best interests of the children. Parents value opportunities to meet other parents and share experiences about bringing up children and helping them to learn.

The PTA will be stronger and will help networking if it fully represents all parents. Therefore efforts should be made to:

- Produce materials using straightforward and simple language, that is, avoid abbreviations and the use of jargon and make all communication respectful, unambiguous and clear
- Choose times for meetings that will suit contributing parents and teachers
- Ensure, where possible that PTA meetings are always held in accessible locations

The PTA can actively support the involvement of parents by:

- Arranging opportunities for parents to meet informally;
- Running a social event (such as a coffee morning) for parents of a particular school class;
- Having a parents' page on the school website;
- Welcoming new parents and making sure to include parents from different cultural and ethnic backgrounds;
- Providing a PTA notice board in the school.
- Finding out what information parents would like or need
- Contributing to the preparation of a school handbook in cooperation with staff.

Advising parents in dealing with an issue relating to their child

It is important to note that a PTA is not a forum for complaint against an individual teacher, parent or child, nor does it have a punitive nor supervisory role.

However, it may be appropriate for a PTA to advise parents with a concern in two ways:

- 1) When it is related to a school policy

For example, a parent may have a concern about a child's experience of conflict with another student. The parent should be advised to bring their concern through the proper channels (see below). However, the PTA executive might also propose specific policy amendments with the Principal.

2) In supporting parents

In the situation of a parental concern regarding a specific issue the PTA can:

- Help a parent to find good ways of approaching a staff member about a problem with a view to having the problem sorted out
- Let a parent know that there is a complaint procedure available through the school and encourage the parent to use the procedure.

The PTA needs to be non-discriminatory in the way it deals with issues of concern from parents and treat all concerns objectively and equally. The PTA must treat all parents with respect and dignity and provide all parents with the same guidelines and advice.



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Chapter 3

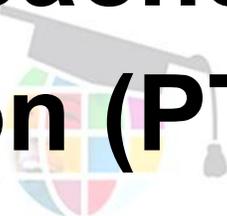
Establishing a Parent Teacher Association (PTA)



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Chapter 3—Establishing a PTA

Step 1: Establishing a PTA executive-

While all parents are members of the PTA, not all can, or need to, be involved in the day-to-day business of organizing the work. It is for this reason that parents in a school elect a PTA committee.

The PTA committee consists of a:

- President
- Vice President
- Secretary
- Treasurer

The committee is the team of people who manage the tasks of the PTA on behalf of the parents. The PTA committee needs to work as a team in order to be effective. In establishing or electing the PTA committee it is vital that all members of the PTA understand the role and work of the committee.

The role of the PTA committee

The committee manages the business of the PTA in accordance with the rules (By-Laws) of the PTA from one Annual General Meeting (see chapter 7) to the next.

The PTA committee must:

- Communicate with the entire parent body;
- Represent the entire parent body.

The work of the committee/team

The team has shared responsibility for:

- Planning for the future and developing a vision for the PTA;
- Planning and managing the annual program of activities for the PTA;
- Communicating, consulting with and involving as many parents as possible in the activities of the PTA;
- Planning agendas and keeping records of meetings;
- Managing the PTA finances;
- Drawing up the By-Laws by which the PTA operates in collaboration with the entire parent body (see PTA By-Laws, Chapter 6);
- Valuing diversity and interculturalism and making sure parents who might find it hard to get involved are encouraged and supported to do so.

Remember - there may be many parents who do not want to be on a committee but who may want to help with particular activities. It is important to gather this information; this can be done at the Annual General Meeting or by sending out a questionnaire to parents.

Subcommittees can be created for specific activities or events. It is important to note, however, that subcommittees may not make decisions; they remain at all times accountable to the main committee.

Step 2: Electing the PTA committee

It is the PTA's responsibility to conduct annual elections each year at the Annual General Meeting in the Fall. It is the responsibility of the PTA Committee to ensure that the elections are run efficiently and in line with the provisions in the By-Laws.

Soliciting Candidates

The PTA will send notices to all members informing them of the need to hold annual elections. The notices should include:

1. A list of all available executive board positions;
2. An acknowledgement that the only qualification for all offices is that the candidate be a teacher or a parent of a child in the school;
3. Term limits, if they are included in the By-Laws;
4. The mechanism(s) by which candidates should notify the nominating committee of their interest in running;
5. The date that nominations will be officially closed.

Anyone who is a teacher or a parent of a child in the school can be nominated to be on the PTA committee as long as this is with their knowledge and consent. The PTA must ensure that all parents understand what it means to be a committee member.

Conducting an Election Meeting:

1. Before the Election Date:

- **Principal Notification:** The PTA Committee must inform the Principal of the proposed date and time of the election meeting 15 days in advance.
- **Review of PTA By-Laws:** The PTA Committee should review the PTA By-Laws to ensure compliance. Remember, any PTA member may present a motion at a general membership meeting to amend a provision of the By-Laws that is not in compliance. Amendments that bring the By-Laws into compliance must be voted on immediately after the motion is presented.
- **Written Notice:** The PTA Committee must send written notice to all PTA members informing them of the date and time of the election meeting. The notice must be dated and distributed at least 10 school days before the election meeting.

- **Online Voting:** All PTA members will be able to vote by completing an online ballot and sending in to the PTA official email address. Online voting will be available 3 days prior to the election meeting and closed at 12pm on the Election Day allowing enough time to print the ballots and have them at the election meeting to be counted.

2. Election Night

- **Materials:** The nominating committee should have the following items prepared:
 - ⇒ Ballots (see Appendix A) – be sure to have enough blank ballots for the assembled members.
 - ⇒ Attendance sheets.
 - ⇒ Pens – for the voters.
 - ⇒ Ballot box – if the school is unable to provide one.
 - ⇒ Tally Sheets (see Appendix A) – you will need at least one per elected office.
 - ⇒ PTA Election Certification Form (see Appendix A).

3. After the Election

- Ensure that the principal is provided with a copy of the PTA Election Certification Form. The original must be maintained by the PTA Committee along with the ballots, tally sheets, attendance sheets, and minutes of the election meeting.

Voting system

The PTA will use a simple voting system, based on who gets the highest number of votes. When a class representative is being elected, only the parents of children in that class vote.

Participation and the right of all parent voices to be heard are fundamental to the running of a democratic structure like a PTA. All parents must have access to and be given the opportunity to vote. By establishing a tradition of transparency and democratic process it is more likely then that parents will expect similar consultation in other aspects of PTA life.

Counting the Votes

Two impartial people at the meeting should be nominated as tellers to count the votes. Votes should always be counted in public. It is good practice for the committee to retain the votes until the next election.

Term of office of the committee

Usually, the committee serves for 2 years or a minimum of 1 year. In order to make sure that there are new as well as experienced members on the committee the By-Laws should provide for a number of places for new members each year. It is good practice to have a combination of experienced and new members.

At the AGM all committee members that have served in the same position for 2 years, step down, but they can be re-elected as long as they continue to be a teacher or a parent of a child in the school. It is advised

that members of the PTA committee should not hold the same officer position for more than four consecutive years in the same position; this is to ensure that parents are represented by an evolving and developing committee. Members that have served for 4 years in one position are allowed to run for a different position within the PTA Committee.

Step 3: Electing the Officers of the PTA committee

Before parents are elected as officers of the committee the roles of the officers should be clarified.

The committee at its first meeting should elect from its members the officers of the committee.

The President

The role of the President of the PTA Committee is to:

- Lead and guide the committee in planning and delivering on their activities. This should involve:
 - Chairing meetings
 - Helping the committee to have a clear vision and clear goals
 - Keeping the work of the PTA to agreed targets
 - Ensuring all members are respected, listened to and are encouraged to have their say
 - Facilitating people to work well together ensuring that the work of the committee is shared
- Reviewing the work of the committee
- Ensure that everyone has a clear understanding of their roles within the committee
- Delegate the work of the committee to ensure all work is not the responsibility of one or two people
- Work closely with the Vice-President, the Secretary and staff representatives to plan the agendas and meetings
- Work in regular collaboration and dialogue with the Principal on a monthly basis in due time before each PTA meeting
- Ensure that the minutes are signed, dated and kept safely
- Encourage the committee members to be prepared for the meetings
- Ensure meetings start and finish at the agreed times
- Make sure that, as each item is finished, the group is clear about what has been decided
- Ensure that all decisions are taken democratically and with respect for everyone's opinions
- Check on responsibilities taken on by members of the committee and make sure they have been clearly understood and allocated
- Summarize all decisions at the end of the meeting
- Ensure that at the end of term of office all relevant documentation is passed on to the incoming President.

The Vice-President

The Vice-president has the responsibility to assist the President with all the duties of the President. In addition, the Vice-President will be responsible for the following duties:

- Preside at any PTA Board and Annual General Meeting where the President is absent
- Preside at any PTA event where the President is absent.
- Aid the President in his/her duties as required.
- Is responsible for organizing staff Appreciation events

The Secretary

The role of the Secretary of the PTA committee is to:

- Take minutes at each meeting
- File all correspondence and minutes safely
 - Minutes should be brief and should be a record of decisions made and actions to be taken; they may also record a brief outline of issues discussed
- Agree the agenda for committee meetings with the President. It is important that all committee members have a right to have items included on the agenda, therefore they must be given adequate time to pass these items on to the Secretary
- Make sure all committee members have the agenda prior to the meetings so they can be adequately prepared
- Make sure all parents and staff receive a copy of the minutes of meetings, including committee members who had been unable to attend
- Appropriately administer incoming and outgoing correspondence
- Ensure the minutes are approved at each meeting. It is important at committee meetings that the minutes are agreed by those that attended to be a true and accurate record of what happened. Once this has been agreed by the committee the President and Vice-President should sign the minutes for the committee's records. This process is especially useful if there is any confusion in the future regarding any decisions made.
- Assist the President with clarification of decisions made at meetings
- Ensure that at the end of term of office all relevant documentation is passed on to the incoming Secretary

The Treasurer

The role of the Treasurer of the PTA committee is to:

- Lodge and record all financial transactions
- Manage and maintain books/record of income and expenditure
- Give monthly reports on the PTA finances to the PTA committee
- Issue receipts for all financial transactions
- Ensure that the committee has the necessary information to understand the PTA's financial needs
- Advise on how the resources can best be used to fulfil the aims and work plan of the committee
- Liaise with a bank or other financial institutions on behalf of the PTA
- Present a full account of the year's income and expenditure at the PTA Annual General Meeting.
- Ensure that at the end of term of office all relevant documentation is passed on to the incoming

Treasurer

The Treasurer must complete and submit a form to the bank to validate the names of those who are entitled to access the account; customarily, this must be done each year when there is a change of personnel on the committee.

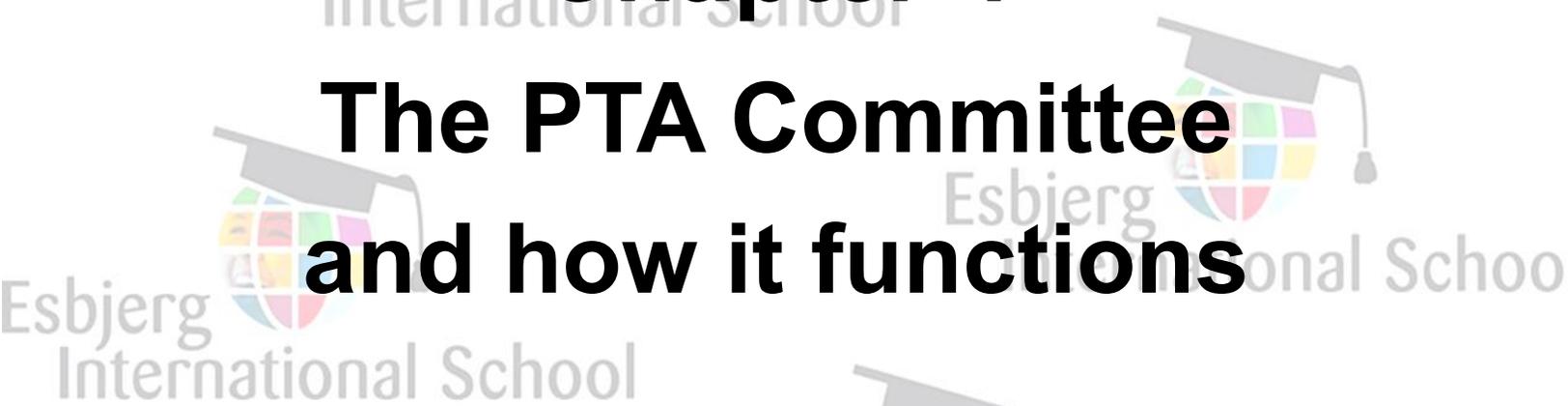
It recommended that additional roles, like the listed below, are fulfilled to ensure the whole school population is being represented within the PTA:

- Early Years PTA representative
- Primary PTA representative
- Secondary PTA representative
- Web coordinator
- Class Representatives
- Student Council Representative
- Volunteers Coordinator



Chapter 4

The PTA Committee and how it functions



Chapter 4—The PTA Committee and how it functions

The committee and communication

The PTA committee needs to make their communication respectful, unambiguous and clear. It is important to choose times for meetings that will suit the participating parents and staff.

The Parent Teacher Association (PTA) Committee can communicate with the parents in a number of different ways for example by means of:

- A formal meeting e.g. an AGM
- An informal social gathering to welcome and involve new parents
- A newsletter
- A notice Board
- The school website or the PTA page on the school website
- Through the PTA email

Running committee meetings

Agenda

The agenda is the list of items that will be discussed at a meeting. A focused agenda is essential to having a productive meeting.

The President, Vice-President and Secretary set the agenda together. At the end of each meeting the President should ask the committee if they have any item they would like on the next agenda. It is a good idea to specify the time allocated for each item on the agenda.

The agenda should be sent out to all members of the committee a week in advance of the meeting where possible. This gives all members of the committee an opportunity to prepare for the meeting and to inform the President or the Secretary of any items they would like added to the agenda.

Pre Agenda

A Pre Agenda meeting with the school Principal, Vice-Principal and PTA President and Vice-President

should be organized to discuss and approve items on the agenda for the next PTA meeting. This is an opportunity for the school Principal to provide an update on items and clarify on specific points.

Minutes

Minutes should list those who attended the meeting and any apologies received. Minutes cover the topics discussed, decisions taken and who will do what and when. Minutes should not include comments made by individuals.

Minutes should be sent within a week of the meeting and published on the PTA website.

Remember – minutes of the committee meetings should be sent to all Class Representatives and Student Council Representative. At the next meeting these minutes are signed and dated by the President and Vice-President after the committee agrees that they are a true and accurate record of the meeting and decisions taken.

Communication and confidentiality

The committee should communicate openly with parents in the school. Occasionally matters may arise that should be kept confidential, it is very important that this confidentiality is explicitly stated to committee members and is respected.

When and where meetings should be held

Meetings are usually held once a month during staff working hours in the school. Giving committee members advance notice of meetings will ensure better attendance.

PTA meetings should be preset by the President before the school year starts and aligned with school events and official holidays throughout the year in order to avoid calling extra meetings. The PTA calendar can be discussed at the first meeting of the school year with the rest of the PTA members.

Length of committee meetings

Knowing the length of the meeting helps people stay focused and encourages a good use of time.

In addition to an accountability person for the meeting, the meeting leader (i.e. President), it is helpful to have the additional support role of a Timekeeper. A Timekeeper is one who is responsible for monitoring the time of the entire meeting as well as each agenda item. He or she gives the participants awareness of time frames in order for them to pace themselves appropriately.

If during the meeting it is identified that further discussions are required for a specific item in the agenda, a different meeting should take place at another time with those involved on the matter.

Often a meeting leader believes he or she can do the role of the Timekeeper. It is better to assign others in the meeting the responsibility of this role as it allows the meeting leader to stay focused on the meeting process, content and dynamics.

Evaluating

It is a good idea for the committee to develop the practice of reviewing their work. This enables the group to be effective and to value the work they do. A brief informal evaluation can take place at the end of a meeting; however, an overall review of the work of the committee should be done at the end of each school year.

After each PTA event, a “lessons learned” document should be produced and kept as a record for future events.

How to be a good committee member

It is important as a committee member to act effectively as an individual but it is also essential to work collectively as part of the committee team. Take time at the start of the year to help newcomers to feel welcome and get actively involved. Remember it is hard for new people to join an already established group.

If you are a newcomer don't be afraid to ask, you won't be expected to know everything.

Prepare well

Read the minutes and any other information sent out before the meeting. Be clear about the purpose of the meeting. Prepare any points that you are going to raise.

Participate fully

Listen carefully and think about what is being said. Feel free to speak when you have something to contribute. Make your point at the appropriate time.

Be mindful of others

It is important to be aware of other points of views, cultural backgrounds and people's feelings, this will help everyone hear and understand better.

Listen to other views

Be reasonable and open to changing your mind – one of the purposes of the meeting is to exchange information and ideas, to learn from each other and to listen to other views on issues.

Communicate honestly and openly

It is important that people should give their opinions at the meeting and that these are appropriate and relate to the agenda items. This can be difficult at times, but it is more constructive than making comments outside the meeting, which can sometimes happen if views are not properly aired.

Support the President

Be supportive of the President. Give constructive feedback. Give ideas on ways to proceed. Remember it is important that the committee works as a team.

Be reliable

If you agree to take on a task be sure to carry it out. Then be ready to report back at the next meeting.



Chapter 5

PTA Finances



Chapter 5 - PTA Finances

The legal background

The PTA is entitled to raise funds for the administration and activities of the association and is entitled to open an account in the name of the PTA.

To safeguard all members of the PTA, it is recommended that two members of the PTA committee should be responsible for signing any authorizations on the bank account i.e. there should be two signatures required on each transaction. The signatories are normally the Treasurer with either the President or Vice-President.

The PTA must complete and submit a form to the bank to validate the names of those who are entitled to perform movements in the account; normally, this is done each year when there is a change of personnel on the committee.

All transactions (income and expenditure) must be accounted for and a report given at each committee meeting by the Treasurer using the Financial Balance Sheet in Appendix A.

Full accounts must be maintained and presented at the PTA Annual General Meeting, in accordance with the rules (constitution) of the association.

Fundraising

At the beginning of the school year, the PTA committee should meet with the Principal and together decide what will be of most benefit to the school. The Principal may draw up a wish list from which the PTA committee can choose.

Receipts should be kept by the PTA for all items/services purchased with funds used from the PTA. The PTA Expenses Form should be used for this purpose (see Appendix A).



Chapter 6

PTA By-Laws



Chapter 6 - PTA By-Laws

What are the PTA By-Laws?

Every PTA should have ground rules to guide its work and define how it operates. These rules are usually brought together in the By-Laws. The By-Laws should be reviewed yearly at the AGM to ensure the PTA is operating effectively.

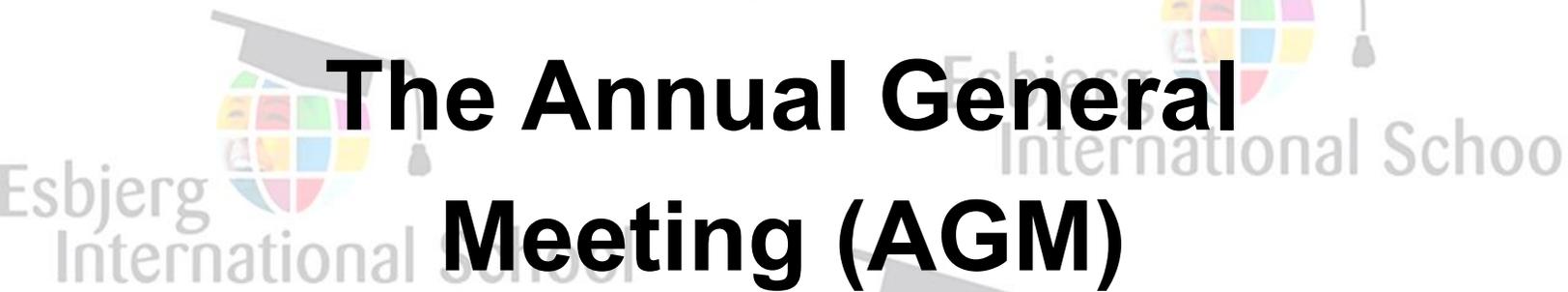
PTA By-Laws

1. The President, Vice-President, Secretary and Treasurer must each be elected by secret ballot.
2. Elections must take place after a new school year has started and before the start of September.
3. Elections must be organized and announced in writing by the staff representative of the administration to all parents, and staff with children, with reasonably notice. The PTA President and the staff representative of the administration must agree on the date and place of PTA meetings.
4. The PTA President, the staff representative of the administration and a member of the school administration will meet in person in the days prior to all PTA meetings to discuss written agenda.
5. Decisions shall be made when quorum is present at a formal PTA meeting.
6. Quorum exists when a majority of the PTA Committee members plus the President (or his/her self-appointed replacement) are present for a meeting.
7. The President will decide if any matters need to be voted on.
8. The school will make appropriate levels of funding available for the PTA to organize non-fund raising events that are of benefit to students.
9. The PTA will use its own funds to prepare for fundraising events and activities.
10. The PTA will provide the school administration with a draft calendar of its preferred events and activities in the next school year no later than the end of April.



Chapter 7

The Annual General Meeting (AGM)



Chapter 7 - The Annual General Meeting (AGM)

The Annual General Meeting is important as it ensures openness and accountability and it is essential that all parents of children in the school are invited and welcomed. Invitations should be extended to the Principal and Board of Trustees.

At the AGM the PTA committee, to ensure openness and transparency, as a minimum must:

- Account for the work of the past year
- Account for money received and spent
- Hold elections for the PTA committee

Planning the AGM

The AGM can be held at any time during the school year, the EIS PTA has chosen to hold their AGM after the school has started but before the start of September. At least 15 working days written notice of the AGM should be given to all parents of children in the school; this notice should include the agenda.

Accounting for the work

This is done through the following:

- Minutes of previous AGM.
- President's report on the work of the PTA.
- Report from subcommittees e.g. International Festival committee, Fundraising committee, Christmas Fair committee, etc.

Accounting for the money

The Treasurer must make a financial report of the PTA's financial activity at the AGM. This will include a

report of the income and expenditure of the PTA for the year.

Holding the Parent Teacher Association (PTA) Elections

Election of new committee members is done at the AGM. It is important to acknowledge and thank outgoing committee members. The procedure for electing committee members can be found in Chapter 3, step 3.

Other business which may take place at the AGM includes:

- Having an opportunity at the AGM for parents to meet each other.
- Getting feedback on events planned for the year.
- Asking parents what activities would be useful to them.
- Offering opportunities to parents to discuss and ask questions about the work of the PTA.
- Encouraging parents to become active members of the PTA.
- Celebrating the work of the past year.
- Inviting the Principal to speak to the members of the association.

It is important to keep the agenda precise and to the point so that people don't get bored. Start the meeting on time and don't let it go on for too long.

Sample agenda for an AGM

(This is a sample agenda therefore please note times given here are suggested times only)

7pm – 8.30pm

Agenda item	Time
1. Welcome	5 minutes
2. Minutes of the last AGM	10 minutes
3. Chairperson's report	10 minutes
4. Financial report	10 minutes

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|---|------------|
| 5. Report from the subcommittees | 20 minutes |
| 6. Principal/Board of Trustees address | 10 minutes |
| 7. Election of new Parent Association committee | 15 minutes |
| 8. Close | 5 minutes |

Tea & Coffee



Appendix

A

