



section
9

RESOURCE GUIDE

New York State

PTA[®]

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**school and
community**

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school and community

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what is family engagement?

The following definition comes from the Family Involvement section of the [Harvard Family Research Project](#) website. It is a “concise, broad-based statement that supports PTA efforts at systemic change, covering all action team goals” to develop and enhance school practices for family engagement.

First, “family engagement is a **shared responsibility** in which **schools, other community**

agencies and organizations are committed to reaching out to engage families in meaningful ways, and in which families are committed to actively supporting their children’s learning and development.”

Second, “family engagement is **continuous across a child’s life** and entails enduring **commitment** but changing parent roles as children mature into young adulthood.”



Harvard Family Research Project

Third, “effective family engagement cuts across and reinforces **learning in the multiple settings** where children learn – at home, in prekindergarten programs, in school, in after school programs, in faith-based institutions and in the community.”

National PTA’s standards for family-school partnerships

Standard 1: Welcoming all families into the school community –

Families are active participants in the life of the school, and feel welcomed, valued and connected to each other, to school staff and to what students are learning and doing in class.

Standard 2: Communicating effectively –

Families and school staff engage in regular, meaningful communication about student learning.

Standard 3: Supporting student success –

Families and school staff continuously collaborate to

support students’ learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.

Standard 4: Speaking up for every child –

Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

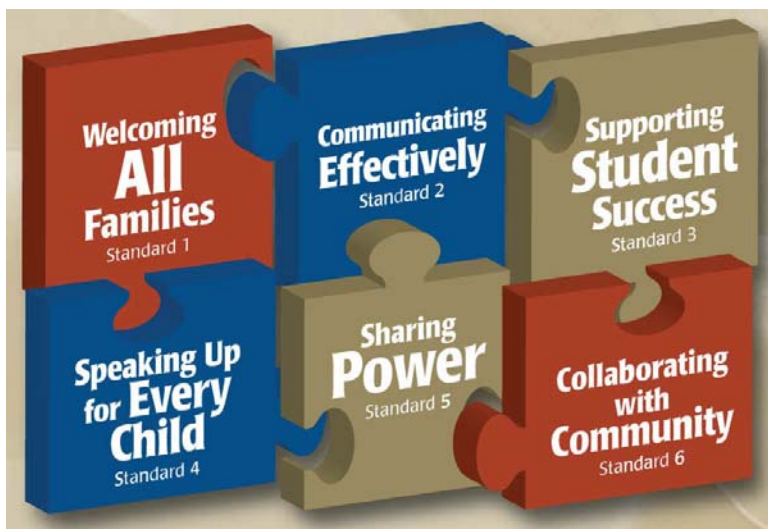
Standard 5: Sharing power –

Families and school staff are equal partners in decisions that affect children and families

and together inform, influence and create policies, practices and programs.

Standard 6: Collaborating with community –

Families and school staff collaborate with community members to connect students, families and staff to expanded learning opportunities, community services and civic participation.



family engagement

a priority of PTA

Affirming the significance of parent and family involvement has been a priority of National and New York State PTA since 1897, the year of our founding. We have consistently shown that effectively involving parents and families in support of children and their education produces meaningful and lasting results.

Children do better when their parents are involved!

family engagement policy

New York State PTA encourages units and councils to work with their school districts on the creation of a family engagement policy in addition to the school district's plan required by Commissioner's Regulation 100.11 (Shared Decision Making). A family engagement policy should be developed by a committee that represents the entire school community.

national standards for family-school partnerships

The New York State PTA has been working with the National Standards for Family-School Partnerships since 1997. These standards were developed after years of research that showed the importance of family involvement and student success. They are voluntary guidelines that can help education leaders, including PTA leaders, move from discussion to action. The standards encourage comprehensive family-school partnerships in programs and policy development at every level. New York State PTA continues to urge the New York State Board of Regents to adopt the National PTA Standards for Family-School Partnerships as a statewide,

systemic approach to family engagement in all schools.

who is a "Parent"?

The term "parent" is interpreted broadly, to include the adults who play an important role in a child's family life. We recognize that many different adults may carry the primary responsibility for a child's education, development and well-being, including grandparents, aunts, uncles, stepparents and guardians.

research findings

- When parents are involved, students achieve more, regardless of socio-economic status, ethnic/racial background or the parents' education level.
- The more extensive the family engagement, the higher the student achievement.
- When parents are involved in their students' education, those students have higher grades and test scores, better attendance and complete homework more consistently.
- When parents are involved, students exhibit more positive attitudes and behavior.
- Different types of parent/family involvement produce different gains. To have long-lasting gains for students, family engagement activities must be well-planned, inclusive and comprehensive.

family involvement is encouraged and supported

The New York State Education Department encourages parent/family involvement through a district's Shared Decision Making (SDM) committee. SDMs require parent participation on many local and statewide planning committees. The ESEA/NCLB Act encourages parent/family involvement and,

in fact, parts of the law actually require it.

building successful partnerships

Building Successful Partnerships is a multi-faceted process that focuses on the importance of family-school partnerships using the National Standards for Family-School Partnerships and is the title of a National PTA program.

More information about National Standards for Family-School Partnerships and the "Power of Partnerships" can be found at: www.nyspta.org/Resources/Resources_FamilySchoolPartnerships.cfm.

Family engagement at the state level

The adopted "Board of Regents Policy Statement on Improving Student Achievement and School Performance through Parent and Family Partnerships" serves as the basis of **family engagement initiatives** in New York State.

The Implementation Plan adopted in June 2007 established programs, projects and timelines that will coordinate parental involvement throughout the State Education Department. These can be found at:

[www.p12.nysed.gov/
accountability/APA/Family
Partnerships/FP_home.html](http://www.p12.nysed.gov/accountability/APA/FamilyPartnerships/FP_home.html)

and

[www.regents.nysed.gov/
Summaries/O207summary.
htm](http://www.regents.nysed.gov/Summaries/O207summary.htm)

PTA and school-based planning

what is school-based planning?

School-based planning is the planning, goal setting, decision-making and program delivery along with accountability that occurs at the school site, allowing for a grassroots approach to education.

Shared Decision Making (SDM)

This is a process for making and communicating decisions. The partners in education affected by these decisions are represented on a team and agree to work together to provide information to solve the issues of the school working to greater success for all students.

school-based planning/ shared decision making

The Board of Regents in Regulation 100.11 mandated that each school district in New York State have a district plan which involves parents, teachers, administrators and members of the community in school-based planning approved by the Board of Education and filed with the Commissioner of Education. National and state PTAs have been in the forefront asking that parents be included in the decision-making process, and now it will be a responsibility of the PTA units and councils to assist parents in fulfilling that commitment.

the role of PTA

The National PTA Bylaws, Article III (d), state, “The association shall work with the schools to provide quality education for all children and youth and shall seek to participate in the decision-making process establishing school policy, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education.”

As an **independent, nonpartisan child advocacy group**, the PTA needs to play a key role in school-based planning in a school or school district. School-based planning should build a true partnership among the principal, teachers and parents in the school. The PTA should work to assure that parents and members of the community are represented on the team. The PTA should continually serve as a resource, gathering and sharing information to keep parents and the community involved and well-informed.

Parents and community members need to be aware of their right and responsibility to participate in school-based planning, and be reminded of how important they are to the successful education of all the children in the school.

PTAs should promote:

- **Education of parents** about the Shared Decision Making plan for the school district:
 - the selection process for parent representatives
 - membership of the team (administrator, teachers, parents and others)
 - length of terms
 - educational issues
 - authority
 - responsibilities of members
- **Good communication:** An oral or written report from the parent representatives on the Shared Decision Making teams should be on every PTA agenda. Two-way, meaningful communication is an important part of the process.
- **Training for parent members:** Training should be available on school policies, the New York State Common Core Learning Standards, curriculum,

assessments and other topics. Parents should be trained with the team in consensus building, group dynamics, team building and facilitator techniques. Parents should request training, as needed.

- **Public forums:** It is important for the large group, the stakeholders of a community, to help set the goals. The SDM team can utilize forums to get more input. The PTA can host a forum.
- **Surveys of the parents:** PTA can assist in surveying parents.

thoughts to remember:

patience.

School-based planning needs to be a systematic process, not a “quick fix.”

teamwork.

School-based planning is not simply a transfer of “power” from one group to another. The goal should be to have the school community be a team that sees problems and finds solutions together.

the well-being of children.

The important question for PTAs to consider on all activities is whether the proposed action will improve education for all students in the classroom.

resources.

It is important that team members new to participation on a school-based planning team (this may be called the “shared decision making team,” “site-based team,” “compact for learning team,” etc.) be trained. Contact your school administrator for information.

Shared Decision Making information is also available from the New York State Education Department website: www.p12.nysed.gov/part100/pages/10011.html.

Shared Decision Making (SDM)

SDM is a building-level process involving several group representatives who use their expertise and perspective to develop recommendations for improving student achievement.

Building-level teams need to focus on student achievement:

- Advocate for decisions based on student needs.
- Collect and analyze student achievement data.
- Base recommendations on expected changes in student achievement.

Site-based team (SBT) is a team of school partners – teachers, parents, administrators, students and other community members – who work together as a team to help the school address the educational needs of the students by helping to set the direction for the school.

Using a strategic planning model is an important and necessary step for effective teams to develop a strategic plan, which may be for a single year or a longer (three to five years) timeframe.

Planning is not a difficult task, but there are key components

of a successful strategic plan that must be developed.

goals:

(Where are we going?) Clear goals are necessary or the team will not have direction. The SDM team may develop the goals or the team may review already existing goals. School districts and buildings have many different types of plans with goals already developed. (Title 1, Professional Development Plans, Academic Intervention Services, etc.) The SDM team should coordinate the development of its goals with existing plans.

needs:

(Where are we now?) The distinct needs of the students in the school building or district must be identified. There are many different types of data available for teams to identify the current state of student achievement in their school and to evaluate their needs.

action plans:

(How will we get there?) Plans must be developed to create a blueprint for improving student

achievement. The team should develop some long and short range action plans as part of a three-to-five-year strategic plan.

steps to developing a strategic plan

After developing the goals, data collection begins to identify the needs of your school. Some points to consider in identifying the needs are:

- Student characteristics
- Community expectations
- Data analysis
- Root causes
- Present vs. future goals
- Expected needs vs. actual needs

Once the needs of your schools have been identified, the creation of action plans begins.

Points to consider are:

- Innovation
- Research
- Best practices
- Strengths of your school

The action plans are then developed, and methods of evaluating the action plans and the strategic plan must be identified.



“Comprehensive planning and shared decision making in schools are critical elements of New York’s educational reform effort in building the capacity of schools to help students and schools improve their performance. As schools continue to align curriculum with the learning standards and new State assessments, the central role and focus of the shared decision-making teams is clear: to engage in comprehensive district-wide and building-level planning, and to make data-driven decisions that focus on the improvement of teaching and learning.”

James Butterworth
Assistant Commissioner, New York
State Education Department
September 1999

a summary of regulation 100.11:

school-based planning/shared decision making
 approved by the New York State board of regents in 1992
 current through December 21, 2009

specifics:

Every school district must have a Shared Decision Making (SDM) Plan, adopted by its board of education, that involves parents, teachers and administrators in school-based planning (meaning at each school building in the district) and shared decision making. The original SDM Plan had to be adopted by February 1994. A biennial review of the plan is required every two years.

The original SDM Plan was developed in collaboration with a district committee, which had to include the superintendent, administrators, teachers and parents.

The SDM Plan for participation in school-based planning and shared decision making shall specify:

1. The educational issues that will be subject to cooperative

planning and shared decision making.

2. The manner and extent of the expected involvement of all parties.
3. The means and standards by which all parties shall evaluate improvement in student achievement.
4. The means by which all parties will be held accountable for the decision that they share in making.
5. The process whereby disputes presented by the participating parties about the educational issues being decided upon will be resolved at the local level.
6. The manner in which all state and federal requirements for the involvement of parents in the planning and decision making will be coordinated with and met by the overall plan.

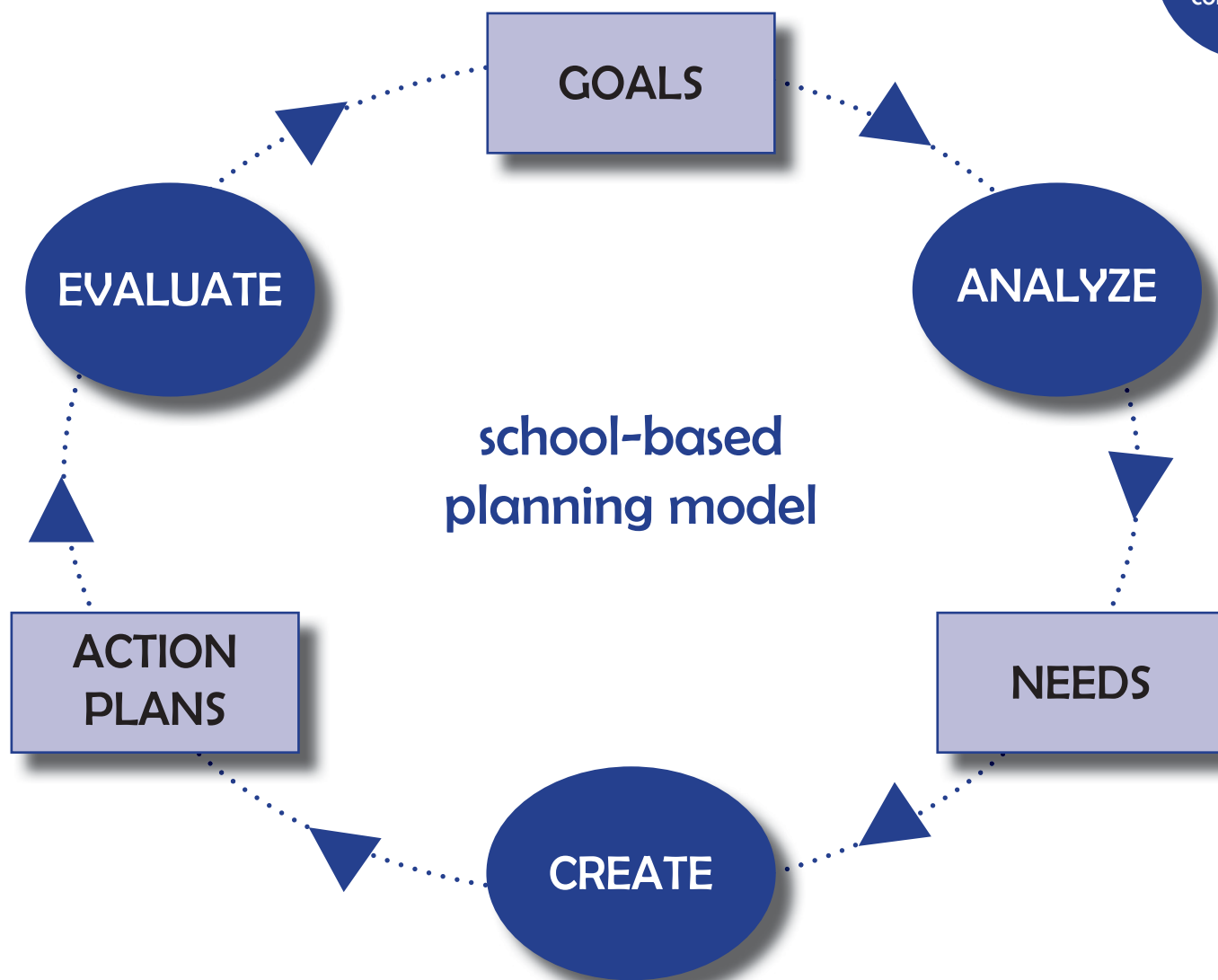
biennial review:

The school district's SDM Plan for school-based planning and shared decision making shall be reviewed biennially by the board of education. Any amendment or recertification of the plan shall be developed with full participation of the designated representatives of the administrators, teachers and parents.

Many school districts convene a committee of the designated representatives of administrators, teachers and parents every two years to do the biennial review. Other districts have specified in their plan a permanent district committee and then assign the responsibility of the biennial review to this existing committee.

NOTE: Refer to the **Appendix** for the complete regulation.





a dynamic team

clearly states its missions and goals:

A team requires a clearly stated purpose and goal: not just an understanding of what needs to be done at the moment, but an understanding of the overall focus of the team. Shared goals and objectives lead to commitment. Team members involved in the goal setting process will feel ownership and be better involved in carrying out what is needed to be done.

operates creatively:

Experimentation and creativity are vital signs of a dynamic team. Such teams take calculated risks by trying different ways of doing things. They don't let a fear of failure stop them from trying new

processes or techniques. They are flexible and creative when dealing with problems and making decisions.

focuses on results:

The ability to produce what is required, when it is required, is the true test. A dynamic team is capable of achieving results beyond the sum of its individual members. Team members continually meet time, budget and quality commitments. "Optimum productivity" is a shared goal.

clarifies roles and responsibilities:

A dynamic team clarifies the roles and responsibilities for its members. Each member knows what is expected of him or her and

knows the roles of fellow team members. A dynamic team updates its roles and responsibilities to keep up with changing demands, objectives and technology.

is well organized:

A dynamic team defines protocol, procedures and policies from the very beginning. Structure allows a team to meet the demands of any task it must handle.

builds upon individual strengths:

Coaches of sports teams constantly inventory their player's skills. Likewise, leaders of dynamic business teams regularly catalog their team's knowledge, skills and talents. Team leaders are

continued on page 8

a dynamic team, con't.

aware of their members' strengths and weaknesses, so they can effectively draw upon individual competencies.

supports leadership & each other:

Dynamic teams share leadership roles among members. Such teams give every member the opportunity to "shine" as a leader. The team members also appreciate formal supervisory roles because formal leaders of a dynamic team support team efforts and respect individual uniqueness.

develops team climate:

A high performance team has members who enthusiastically work well together with high degrees of involvement and group energy. Collectively, individual members feel more productive and find that team activities renew their interest and spirit. Such a team develops a distinct character of its own.

resolves disagreement:

Disagreements occur in all teams. It's not necessarily bad or destructive. A dynamic team deals openly with conflict when it occurs. The team members recognize conflict and try to resolve it through honest discussions tempered by mutual trust.

communicates openly:

Members of a dynamic team talk to each other directly and honestly. Each person solicits suggestions from other members, fully considers what they say, and builds on their ideas.

makes objective decisions:

Dynamic teams have well-established, proactive approaches to solving problems and making

dynamic team assessment

Rating your team: 5=exceptional 1=deficient

1.	Clearly states its mission and goals	1	2	3	4	5
2.	Operates creatively	1	2	3	4	5
3.	Focuses on results	1	2	3	4	5
4.	Clarifies roles and responsibilities	1	2	3	4	5
5.	Is well organized	1	2	3	4	5
6.	Builds upon individual strengths	1	2	3	4	5
7.	Supports leadership and each other	1	2	3	4	5
8.	Develops team climate	1	2	3	4	5
9.	Resolves disagreements	1	2	3	4	5
10.	Communicates openly	1	2	3	4	5
11.	Makes objective decisions	1	2	3	4	5
12.	Evaluates its own effectiveness	1	2	3	4	5

TOTAL SCORE _____

interpreting your score

- 54-60:** Congratulations! Your team is at or near optimum performance. Maintaining your team at this level should be your goal.
- 46-53:** Not bad! Your team's in pretty good shape, although there is room for improvement.
- 38-45:** Your team has problems, some of which may be serious. To rectify them, your team needs to focus on improving its lowest-scoring characteristics.
- Below 38:** Your members are not functioning as a team. Your team needs to work on the basics of team building.

a dynamic team, con't.

decisions. Decisions are reached through consensus; everybody must be able to “live with” and willingly support the decisions. Members feel free to express their feelings about any decision. The team members clearly understand and accept all decisions, and they come up with contingency plans.

evaluates its own effectiveness:

A team needs to routinely evaluate itself to see how it is doing. “Continuous improvement” and “proactive management” are operating philosophies of dynamic teams. If performance problems arise, they can be resolved before they become serious.

that is quite a list!

While it’s a rare team that receives top scores on every item, teams that work toward becoming dynamic often achieve high overall marks. The road to being dynamic will be rough in spots but ultimately rewarding.

developing the team process for Shared Decision Making (SDM)

Successful Shared Decision Making teams have developed a strong team process with good meeting management skills and clearly defined procedures.

Some key elements are:

- Ground rules or operational procedures
- A carefully planned agenda
- Minutes recorded and distributed
- Defined roles and responsibilities
- An understanding and use of consensus
- Ongoing training on team building and educational issues

Successful teams:

- Have clear goals
- Know one another
- Are balanced
- Communicate clearly
- Support one another

Avoid the pitfalls of Shared Decision Making:

- Lack of clear procedures
- Lack of group skills
- Focusing on short term problems
- Trying to fix everything
- Reacting to requests
- Becoming independent

Teams can go through several stages in their development:

stage I

Forming (Testing)

- transitions from individual to group member
- attempts to identify tasks and how to accomplish them
- questions time and resource commitment
- hesitates to participate
- intellectualizes (meaning?)
- may feel suspicion, fear or anxiety
- accomplishes minimal work

stage II

Storming (Infighting)

- infighting, defensiveness and competition
- disunity, increased tension and jealousy
- struggle for leadership
- struggle for authority
- concern over excessive work
- minimal work accomplishment

During this stage go back to forming if (a) you add a person or (b) a person leaves.

stage III

Norming (Getting Organized)

- members accept the team
- moderate work accomplishment
- attempt to achieve maximum harmony by avoiding conflict

- ability to express emotions constructively
- a lot of time spent on bylaws and standing rules
- manipulation of standing rules to control someone or to slip back into “storming”

stage IV

Performing (Mature/Closeness)

- capable of diagnosing and solving problems
- capable of making decisions
- is inclusive
- a great deal of work is accomplished

developing a dynamic team takes time and effort

As individuals we go through stages: youth, experience, maturity, etc. A group’s stages depend on leadership and difficulty of the tasks, as well as maturity as a group.

To attempt to rush through the stages to be more productive will not be successful.

The stages are inevitable; therefore, the group works to build an atmosphere of trust, deals with issues and moves on to perform.

guidelines for selection of parents on Shared Decision Making teams

“A culture of partnership grows best when the community is engaged in the process of planning and setting goals for family involvement in its district’s schools.”

– “Beyond the Bake Sale: How Districts Can Promote Family Involvement,”
[Harvard Family Research Project](#)



expectations for parent members serving on School-Based Planning teams:

Parent members should:

- Be willing to make the extensive time commitment.
- Be flexible and work well with people.
- Become familiar with district plan for school-based planning and shared decision making.
- Participate in team training on school policies, curriculum, educational issues, consensus building, group dynamics, team building facilitator techniques, etc.
- Bring issues and concerns of all parents to the team.
- Communicate effectively:
 - Attend PTA or other parent group meetings to share information and gather input.
 - Write reports on the shared decision making team’s activities for the school newsletter, local paper, bulletin boards, etc., to ensure that all parents are aware and informed.
- Focus on making the best decisions for all children.
- Be aware that sensitive issues must be handled appropriately.

- Understand that SDM team meetings are subject to the New York State Open Meetings law and are therefore public meetings.

selection of parent team members:

The group responsible for facilitating the selection of parent representatives to the School-Based Planning Teams should be outlined in the SDM plan. The procedure that is used for parent selection may not be outlined in the plan but a procedure should be established.

In many school districts, the PTA has been chosen to facilitate the process of parent selection.

There are several key points to remember:

- Establish a clearly defined and democratic process for the selection of parent representatives and publicize it.
- Parent representatives should reflect the school’s diversity.
- All parents/guardians with children in the building are eligible to be parent representatives on the team.
- Information such as the job description, expectations and deadlines for applications as per your school district’s plan should be distributed.
- Publicize the need for parent representatives on the team

and the importance of their membership on the team.

- Consider holding a candidates’ forum (or a meet the candidates’ night) for interested parents and/or advertise the candidates’ biographies through the school’s newsletter, fliers or bulletin boards.

suggested methods of selection:

- Election by all parents/guardians with children in the building, during a school event (open house, parent-teacher conferences, parent education program, ice cream social, etc.), or at a specific, well-advertised date, place and time.
- Lottery of names of interested parents.
- Appointment by parent group or selection committee after public announcement of opening to all parents and a request for a letter of interest (or completion of an interest form).

NOTE: If your district or building plan allows for alternates, they should be selected at the same time using the same method. Alternates could attend all meetings and be trained but vote only when substituting for an absent team member.

consensus

Consensus Decision Making is a process used to ensure that every individual has involvement in a decision. It requires everyone’s participation. **Listening, sharing, trust and respect are values inherent in the process.**

Description Definition: “Well, even though it may not be exactly what I want, at least I can live with the idea and support it.”

the consensus contract

Consensus is based on the term “to consent” as in “to grant permission.” To arrive at consensus is “to give permission” to go along with the total group (perhaps the majority). The implication of consensus is that an individual can negotiate the terms by which he or she will grant his or her permission. Each individual has the right and obligation to make his or her terms known.

consensus means...

- All group members contribute.
- Everyone’s opinions are heard and encouraged.
- Differences are viewed as helpful.
- Everyone can paraphrase the issue.
- Those who disagree indicate a willingness to experiment for a certain period of time.
- Everyone has a chance to express feelings about the issue.
- All members share the final decision.
- All members agree to take responsibility for implementing the final decision.

consensus does NOT mean that...

- The vote is unanimous.
- The result is everyone’s first choice.
- Everyone agrees.
- Conflict or resistance will be overcome immediately.

why use consensus decision-making?

- Develops the commitment and ownership necessary in collaborative decision-making.
- Finds the highest level of agreement without creating factions.
- Assists in maximizing the creativity of the collaborative group.

ground rules for reaching consensus when consensus is elusive

A group functioning in a consensus mode can agree to make certain decisions by vote (50%, 75%, 90%, etc.) or can agree to let one person make decisions (autocratically). As long as everyone agrees to the process and agrees to support the decisions reached through this process, then decisions still have their foundation in consensus.

For example: We can all agree to vote on which two films to view.

OR

We can all agree to debate an issue for half an hour and then to vote if no consensus is reached.

OR

Large faculties or PTAs often reach consensus that proposals can be approved by 75% or 80%, etc., of the membership whenever an issue impacts the entire group.

The key is that there must be consensus to vote or consensus to authorize one person or a few people to be empowered.

guidelines

Here are a few suggestions for when it may be appropriate to reach consensus on a voting process or on empowerment of someone to act autocratically.

- **Limit the time:** Place a time limit on the empowerment. Do not establish voting or

autocratic authority on a long-time basis.

- **Anticipate:** Ask the group to set the ground rules BEFORE you begin to discuss the issue. If you wait until a stalemate is reached on an issue, you’ll find it difficult at that time to agree on a process for resolution.
- **Avoid controversial issues:** The more controversial the issue, the less likely you will get consensus on a voting process. Even if a consensus is reached, the “losers” in the vote may not support the decision notwithstanding the fact that they were part of the consensus vote.

If an issue is highly controversial, it is better to let the consensus process run its course even if this means delaying a decision or not reaching one.

The reason a lot of good ideas for educational change have failed in the past is NOT because the ideas lacked merit but because they lacked support from one or more stakeholder groups. The more important (and controversial) a proposal for change, the more difficult it will be to reach consensus. But you will not have success bringing about major change without consensus of all members and each stakeholder group. When the issue is important, there is no adequate substitute for consensus.

There is a distinction between committees that should operate by consensus and entire stakeholder groups. All stakeholder groups, as a group, should be in consensus on issues, but it may be unrealistic to expect consensus from everyone within a stakeholder group, particularly if that group is large; some groups may vote in order to reach a decision.

guidelines for partnering with other organizations

- New York State PTA staff and volunteers will attend meetings and participate in advocacy on the basis of the resolutions approved at its annual Convention and the priorities determined by the Board of Directors, and to the extent that staff and volunteer time permit.
- Also based on the above-mentioned priorities and time limits, New York State PTA can provide support in the form of:
 - Letters and other communications to elected officials and policy-making agencies
 - Co-signing of coalition letters and press releases
 - Collaboration on position papers, joint studies or informational publications
 - Participation in press conferences, projects or other events
 - Notices in New York State PTA publications encouraging PTA members to support and participate in partners' activities
- Cooperation with other organizations does not include participating in fundraising or membership enrollment activities for other organizations, or contributing funds to finance the work of another organization (although New York State PTA may bear its share of the cost of a cooperative project).

New York State PTA will make financial contributions only to coalitions and projects in which it has a significant role in governance (e.g., at present, Educational Conference Board),

and then only on the basis of the resolutions and priorities described in the first bullet. Expenditures must be specifically approved by its executive committee and authorized by its Board of Directors.

- New York State PTA assumes no obligation (expressly or otherwise), responsibility or liability for the competence, actions or omissions of any person or persons who may have been or become active as a leader, participant or otherwise in any organization or group sponsored by or working in partnership with PTA.
- No New York State PTA representative, as an individual, may commit the PTA to join any other group or agree to abide by any other groups' bylaws or policies.
- At the community level, PTA cooperation is easier when there is an overall organization such as a coalition. PTA should retain its own identity, and

should not be committed to courses of action outside its own field of operation.

- When a PTA participates, it makes sure that the rules of procedure or bylaws of the coalition or council do not conflict with its own bylaws and the bylaws of New York State PTA and National PTA. PTAs should withdraw from participation in the event of such conflicts. PTAs may, however, collaborate in areas of agreement with organizations with which they are not in complete accord on other positions and priorities.

Refer to the list of cooperating partners of New York State PTA on our website at www.nyspta.org/AboutPTA/AboutPTACooperatingPartners.cfm.



how to organize and run an effective study and advisory group

determine need for study

- Set goals.
- Set date when report of study is to be submitted.

form study or advisory group

- Include cross section of school community.

first meeting

- Plan agenda.
 - State reasons for setting up group.
 - Analyze goals.
 - Formulate budget if funds are required to operate.
 - Set preliminary timetable for obtaining data.
- Set tasks for committee members.
 - Gather information.
 - Contact resource persons.
- Elect permanent chair.

gather information

- Tighter timetable might be necessary and agreed upon.
- Ask resource people to meet with committee or to join committee on a permanent basis.
- Members of committee gather information.
- Obtain data from own school district.
- Compare with other similar school districts.
- Interim reports may be asked for.
 - There should be no “leaks” of information as this might prejudice the implementation of recommendations.
 - Reports should be written; contents should be agreed upon by committee.
- Evaluate data obtained.
 - Alternatives offered by committee should be

practical in terms of funds and personnel.

reach a decision

To give a set of options or one clear set of recommendations to executive committee.

- If committee is sharply divided in opinions or recommendations, majority and minority reports can be given.
- Report should include such data as is felt necessary to support recommendations; e.g., tables, comparisons, copies of materials, etc.

present recommendations

- Executive board should thoroughly review committee’s recommendations. If a council study, an open meeting to which all PTA members in the district are invited, should be held:
 - Present findings and recommendations of the committee.
 - Vote on action they feel is necessary.
- If decision is made to submit findings formally to school board, arrangements should be made for copies of the report to be sent to school board and administration in advance of the presentation.
 - Chair of the committee might be chosen to present the report.

TIP:

Always evaluate implementation of goals to make sure they are met.

- Committee members and/or members of the executive committee may accompany chair, according to what has been decided. School board, as legally designated body of the school district, has the final decision as to the disposition of committee recommendations.

follow up

- Evaluate implementation of goals.
- Institute ongoing evaluation of the implementation of changes if adopted by the school board.

the committee should:

- Be responsive and responsible to the PTA board that created it.
- Work in a positive fashion to cooperate with other members of the school family.
- See that recommendations receive serious consideration and stand a good chance of being implemented.

summary

- Determine need for study; set goals.
- Form study group.
- Develop plan to implement goals.
- Gather information.
- Reach a decision.
- Present recommendations to administration, school board, community.
- Follow up; evaluate.

school and community relations

PTA believes that the public schools provide the common experience that helps ensure a democratic society, are essential and must be strengthened and supported. It also believes that **parents and other adults have the right to join together to affect the education of all children** through membership in groups such as PTA.

All PTAs have certain organizational rights, which are to function as an independent, nonpartisan child advocacy group; seek enactment of policies and practices that protect children and youth; participate in making decisions affecting policies, rules and regulations; and meet with appropriate school officials to discuss matters of mutual concern affecting children.

PTA members have the responsibility to do the following:

- Seek information on policies, curriculum and laws that affect children.
- Share accurate information.
- Know, help and interact with teachers and administrators.
- Work both within the PTA and the school in a constructive manner, maintaining respect for democratic procedures and a tolerance for the diversity of opinions.
- Work in partnership with school professionals to determine appropriate levels of programs and services.
- Participate in making decisions affecting policies, rules and regulations.

PTAs should ensure that the process for establishing school policy is clear and provides an opportunity for the public to express its concerns.

PTAs should maintain contact with school board members as



well as school administrators and other school professionals; establish and maintain lines of communication between and among its members, the school staff and school board; attend school board meetings regularly and report on the proceedings to the PTA membership and make statements representing the PTA to a school board only after official authorization by that PTA.

PTA is a partner in education that helps bring the community into the schools. The more the community is involved, the more support is generated for education. PTA should not provide for the needs of the school district or individual school. Monetary gifts cannot substitute for public policy.

Refer to New York State PTA position papers entitled “[Fund-Raising and the PTA](#)” and “[School District Requests for Financial Assistance](#).”

use of school facilities

PTAs frequently use school facilities for meetings, programs, projects and fundraising activities. Most school districts require a PTA or other community group to sign a facility-use permit as a condition for using a school building or grounds. It should be filed well in advance of the event.

A certificate of insurance, which may be required by the school district, is available from the state office upon receipt of the unit’s payment of its share of the insurance premium.

school and community relations, con't.

The school district may require a specific certificate of insurance, which lists the school district as the certificate holder and as an additional insured. The PTA unit president should directly contact Rose & Kiernan, the New York State PTA insurance broker, to request a specific certificate for their school district. Be sure to have available proof of insurance payment, or a copy of the unit's general insurance certificate, before calling. Contact Rose & Kiernan, Inc. at 1-800-242-4433.

PTA and other school groups

PTAs, school support groups, advisory committees, advisory councils, school-based management teams and citizen task forces are all an integral part of the educational system. These groups vary in their purpose, organization, composition and relationship to the school or school district.

PTA may be the coordinating organization at a school for a number of advisory or special interest groups or councils. PTA can take the initiative to call all groups together and have a meeting in which all areas of mutual concern are discussed. The various groups then meet separately to take care of their specific business. Each group will be kept informed of the programs and projects in the school and everyone will have an opportunity to work for the good of all children. In this way, efforts can be consolidated.

PTA may select a liaison who attends other school committee meetings. This person reports to the PTA, involves the PTA in studies and, in turn, reports to the school committee about the PTA.

PTA may work with a school committee by attending meetings, conferring with the leaders, inviting them to join PTA and attend PTA

meetings, acquainting them with the broad scope of PTA projects and programs, and keeping administrators and school staff aware of the PTA's knowledge, expertise and availability.

PTA may have its members – parents, teachers, students and others – as members of an advisory group, committee or council. PTAs should be involved in how members are selected, publicize when and where selections will be made.

PTA has a responsibility to be the independent link between the schools and the community. It should continue to be interested in and concerned about any, and all, work being done by mandated school groups and continue to maintain awareness of community concerns.

conditions governing sponsorship of youth groups

PTAs may sponsor youth groups under the following conditions:

- Reinforcement of the work of youth groups through moral support and encouragement and providing opportunities for youth service. The PTA shall assume no obligation for, nor shall the PTA be responsible or liable for, the actions of any individual acting as a leader, a participant in or in some other capacity for a sponsored group.
- The PTA assumes no obligation to give financial support to groups that it sponsors. The PTA may give publicity to their projects and recognition to their achievements. Because youth groups represent only a part of the work of PTA units, gifts from the PTA treasury shall not be made.
- No PTA may join any other group nor agree to abide by

any other group's bylaws or policies.

- To avoid misunderstandings and to facilitate harmonious relationships between the PTA sponsor and the youth group, a copy of the conditions governing sponsorship should be permanently attached to or be a part of every sponsorship agreement.

PTA and Boy Scouts of America

Boy Scouts requires their troops or packs to have sponsor groups who become their "chartered organizations". The "chartered organization" agrees to many specific duties, which include becoming voting members at the Scout Council, providing facilities for meetings, and approving all leader applications.

Many PTAs are unaware of the full scope of responsibility that is now required of Boy Scouts chartered organizations. Charter renewal by a PTA should not be an automatic action. If your unit now sponsors Boy Scouts, it is strongly suggested that you contact the District Scout executive to find out the responsibilities of a chartered organization. Then, we suggest that you contact your region director.

New York State PTA does not have a policy supporting or opposing PTAs being the chartering organization. However, based on the responsibilities now required of the chartered organization, we do not recommend that PTAs fulfill this role. Your region director can assist you with any questions.

cooperating with community organizations

When a PTA becomes involved in exploring issues such as health needs, recreation resources, substance abuse, suicide or

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school and community relations, con't.

parenting programs, it may become appropriate to form a coalition with other community nonprofit and service groups in order to initiate and carry on a project. Keep in mind that a representative to such a coalition cannot commit the PTA to a program without bringing the proposal to the PTA board or general membership for a vote.

PTA should never give gifts to, nor raise funds for, other organizations. “Disregard of this prohibition could result in loss of tax-exempt status.” (National PTA)

PTAs in urban and rural areas have unique problems – problems complicated by economic and social conditions of the cities or rural areas. PTAs in large and small communities are encouraged to form a network between units, councils, school personnel and boards of education. Programs

and projects based on meaningful issues may also be an outreach to uninvolved parents in need of leadership, as they recognize the part that they and the community should play in the education of all students.

teachers on PTA boards

A teacher, as any other member, may serve in any capacity on a unit or council board. He or she may serve in an elected position, as chair or member of a committee. In order to serve on the board the teacher must be a member of the unit.

Many PTAs include a teacher representative on the executive board. This provides input from teachers in the school during discussions of interest to the teachers. Whether the teacher representative has a vote is determined by the bylaws.

Educational Conference Board

The ECB reviews areas of concern in the field of education and issues statements from time to time. It focuses primarily on state aid to public schools. The New York State PTA is the only lay educational association that is a member of the Educational Conference Board (ECB).

The Educational Conference Board of the State of New York is composed of the following organizations:

- Conference of Big 5 School Districts
- New York State Association of School Business Officials
- New York State Congress of Parents and Teachers (PTA)
- New York State Council of School Superintendents
- New York State School Boards Association
- New York State United Teachers
- School Administrators Association of New York State



PTA works with its school partners

Partnership, teamwork and cooperation – these are the building blocks of education leadership. Parents, teachers, principals, superintendents and school boards have a common goal – quality education – that cannot be achieved by anyone acting alone. Developing a working partnership – communicating with each other, sharing in the decision-making, and mobilizing the community to action – can lead the way to success for all students.

As with most partnerships, success depends on the degree of consistency and fairness with which the rules are applied. Partnership means that each understands his or her responsibilities as well as the other's. It means setting goals and working cooperatively to achieve them. It means respecting each other's opinion – not expecting automatic approval from the other and not withdrawing support if

opinions differ. It means reaching out to all parents and school staff to help our children and youth reach their potential.

At a time when proposed legislation and restricted funding threaten the democratic system of a free, public education for boys and girls, the partners in education must strengthen their alliance.

school partners: the student

If a PTA is to include all the partners in education, the student must not be left out. It is important to listen to students and respect their opinions.

Students in a PTSA should be encouraged to serve as committee chairs or members. They can also be representatives at school board meetings. Students can serve in some elected offices. However, New York State law requires that the office of president, recording secretary (or secretary) and treasurer be filled by a person 18 years of age. Any vice president under the age of 18 may aid the president, but may not perform any of the duties of the president.

Students can hold a student conference and speak on the opportunities in PTSA schools. The presenters and coordinators of the conference should be students. Consider holding this conference at a setting other than the school, and on a weekend. Students can organize art fairs, talent shows, spelling bees, career days, college days, financial aid workshops and health fairs that involve the participation of students in their schools.

NOTE: The art fair could be tied in with the Reflections project. A frequent request has been a workshop for students on writing resumes.



school partners: the school staff

A good relationship is important with other staff members as well. For example, the school transportation professionals can work with a PTA/school safety committee and provide information and presentations for PTA programs. School cafeteria employees can work with PTAs wishing to provide programs and information on nutrition, diet, etc.

The entire school community, working together, can achieve a successful education experience for all.

The PTA fosters community support of education by . . .

- Working to maintain a strong public school system with quality education for all children and youth.
- Supporting training for teachers, principals, parents, administrators and community members in their roles as shared decision-makers at local schools.
- Working for school budgets.
- Urging communities to support teachers' continuing professional education and helping explain the importance of such programs.
- Encouraging parents and community members to be informed about education issues.
- Helping schools connect with the home, providing family and community information and networking with other local organizations.



school partners: the teacher

Teachers are an essential part of PTA. It is important to include teachers and administrators as equal partners in your unit. PTA leaders should be familiar with current organized teacher concerns, know the professional stand on the issues, and be sensitive to the thoughts of local teachers individually.

the partnership: the teacher's role

- Set a friendly tone with parents in notes, phone calls and newsletters. This encourages parents to see themselves as equal partners in the job of educating their children.
- Establish a regular means of two-way communication with parents throughout the school year – weekly classroom newsletters or webpages, teacher-parent journals, good news phone calls or Friday folders.
- Set a clear policy on homework – its purpose, how much time it should take, how parents can help.
- Make sure parents understand classroom programs and policies and the importance of parent support.
- Support parent and community volunteers in the school.
- Attend PTA meetings, serving on committees and in leadership positions, and joining in PTA programs and projects.
- Discuss PTA programs at teachers' meetings, and gather tips about successful programs at other schools to share with the PTA.
- Encourage your school to participate in the Reflections Program.
- Alert the PTA to parents' needs (parents who do not speak

English, parents who work and cannot attend daytime meetings, etc.). Work with the PTA to provide family engagement opportunities in school and at home.

- Share with the PTA issues of concern to teachers, current topics in education, and the need for changes to meet future goals.

the partnership: the PTA's role

- Make parents and other members of the community aware of school policies and programs.
- Help parents understand the importance of their support of school rules and procedures.
- Educate parents in parenting skills and ways to support children's learning at home.
- Strengthen parent-teacher communication and understanding through newsletters, workshops, events and activities.
- Provide informal occasions for teachers and parents to get to know one another as individuals and as partners in education.
- Provide insight into family and community structures, attitudes and influences that affect the children you teach.
- Assist parents through outreach programs and referrals to community resources.
- Conduct volunteer programs in schools.
- Help to integrate in-school and out-of-school activities.
- Educate its members through programs that improve the lives of children and youth – i.e., to prevent alcohol and drug abuse, encourage reading, develop self-discipline and enhance

children's television viewing skills.

- Encourage parents and community members to unite to improve the lives of children and youth through programs that address social problems.
- Educate and encourage participation of parents and community members in the creation and support of responsible school district spending plans. **Refer to Section 8, Advocacy, page 15.**

school partners: the principal

A working partnership between the PTA and the principal is essential if we are to secure the best possible education for our young people. The local PTA president and the principal must operate as a team, both understanding their own unique responsibilities and appreciating the other's; both developing rapport within the special constituencies of parents and staff; both committing themselves to intelligent cooperation in the education of children and youth.

A working partnership between the principal and the PTA, dedicated to the welfare of children and youth, can strengthen family life and improve the schools. Here are some suggestions for nurturing this important partnership:

- Meet consistently at an agreed upon time. Discuss issues. Review plans for events. Keep each other informed.
- Work out problems or misunderstandings in a direct, honest way. Keep an open mind. Listen to each other.
- When working with parents and community, be positive and enthusiastic about your school.

school partners: the superintendent

The superintendent's primary role is one of leadership – leadership that helps the school board identify clear goals for the schools, leadership that interprets policy guidelines to building principals and staff, and leadership that helps the community understand what the schools are and can become.

The superintendent's leadership and support are instrumental in creating a coalition of parents, students, adults who have no children in school, building and district administrators, teachers, support staff and the school board. The PTA is a critical element in this coalition since it represents a broad base of parents and others willing to work actively for and with the schools in order to produce quality education.

The school board is the policy-making body of the school district and employs the superintendent. The superintendent receives general directions and outlines of goals and policies from the school board and is charged by the board with organizing the staff to meet these goals. With the superintendent's recommendation, the board determines the annual budget, sets education goals and approves the guidelines for relationships with all employee groups.

the partnership: the superintendent's role

- Support the development of district-wide policies on family engagement.
- Listen to parents.
- Prepare copies of district parent/community involvement policies and procedures to share with the community.

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the partnership: the principal's role

- Be available to the community on a planned, regular basis. Schedule meetings open to the public at different times – days, evenings and weekends. Invite parents to set up private appointments to discuss concerns.
- Work to make parents feel welcome and comfortable in school – the first step toward family engagement.
- Plan for and encourage parent-teacher conferences. Show parents and teachers how to use conferences to build parent-teacher-student teamwork. Make sure conferences are held at times when parents can come.
- Be sensitive to how a family's home life may affect how parents feel toward school. For example, a parent who is struggling to keep a family housed and fed may have difficulty concentrating on a child's academic problems.
- Be active in the PTA and encourage teachers to participate.
- 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 parents be informed on current issues in education.

- Help the PTA plan activities to accomplish specific goals. For example, encourage the PTA board to plan events that promote children's well-being, home-school cooperation and community betterment.
- Work with the PTA to develop a program for training and using parent and community volunteers.
- Don't encourage a "rubber stamp" PTA or withdraw support when there is reasonable difference of opinion. Seek constructive discussions with parents that will develop a framework of confidence in the school and in the leadership of the principal.

the partnership: The PTA's role

- Encourage the principal to speak openly of his or her goals and concerns.
- Present PTA concerns and issues to the principal. Develop a forum that allows for frank and open discussion.
- Focus on education and how to benefit students.
- Be alert to staff and community talents and resources, and draw on them for the benefit of the entire school.
- Help the principal promote fair discipline for all children.
- Plan PTA programs that inform parents on important school issues.

school partners: the superintendent, con't.

- Strongly encourage all schools to have a PTA. Provide meeting places and support services.
- Requiring PTA and community participation in school-wide or district-wide advisory groups and committees and in communication processes.
- Share the decision making process with parents and teachers.
- Provide school board agendas, administrative agendas and action items to the PTA.
- Assist principals and PTA officers in developing a working relationship.
- Meet and confer with the PTA and other community groups at their meetings.
- Assign key administrators to represent the superintendent and to meet regularly with the PTA and community groups.
- Make it a priority to involve the community in addressing school district issues.
- Help the community identify areas of interest, concern and need.
- Give recognition for community involvement.
- Realize that the PTA is not a force to command but rather a partner working for better schools.
- Set priorities and goals and discuss them with the superintendent.
- Address issues that will benefit all students.
- Expect to be heard as key community leaders and, if necessary, insist on equal access to the superintendent.
- Involve people who will participate actively on committees and task forces.
- Mobilize coalitions, when necessary, to achieve education goals or to support school issues.
- Be willing to openly discuss issues and options for the school district.
- Be sure to recognize the educational accomplishments of the school system, students and teachers, as well as address problems.

the partnership: the PTA's role

- Become familiar with school policies and procedures.
- Understand and use administrative channels.
- Know the difference between the responsibilities and roles of the board, superintendent and principals.

school partners: the school board

Only by understanding what a school board is, how it works and how a parent can contribute to its deliberations, can parents – as a group – hope to influence the significant decisions that the school board makes in their community.

The school board serves the community to which it must answer for its decisions. While the board must depend on professional staff for information and advice, this relationship should never be a substitute for a strong, working partnership with parents.

the partnership: the school board's role

- Appoint a PTA member to all advisory committees.
- Send notices of all school board meetings to local PTA units.
- Attend PTA council, region and local unit meetings, whenever possible.

- Ask for PTA input on issues of importance to the school district (e.g., decisions on school boundaries, budgetary matters, etc.).
- Between the introduction of a policy item and the vote on it, allow sufficient time for the public to express its views.
- Develop a board procedure for when citizens can address the board. The board should set aside time at each meeting for interested citizens to address the board.
- Develop a plan for regularly disseminating information on the action taken at meetings.
- Establish a two-way communication with the school board.
- Appoint a PTA liaison to attend school board meetings and collect copies of agendas and reports.
- Keep the PTA membership informed of school board actions and policies through reports in newsletters, meetings and special programs.
- Present PTA positions on educational and community issues. Remember to always voice the position or consensus of the PTA, not personal views or opinions.
- Review with the school board the state mandated family engagement policy (*Commissioner's Regulation 100.11*) and plans for implementation.

the partnership: the PTA's role

- Learn the difference between administration (superintendent and staff) and policy-making (school board).

school partners: the school board, con't.

- Make sure PTA representatives sit on special school board advisory committees and task forces.
- Invite school board members to attend all PTA programs.
- Encourage parents to attend school board meetings. Let them know the scheduled date, time, place and agenda.
- Call public attention to important school issues being decided by the school board.
- Use PTA newsletters to develop parental understanding of important school issues.
- Don't ask for information and detail at a board meeting.
- Make such requests in a letter or telephone call to the person closest to the problem. Only if the "chain of command" doesn't seem to be working properly should parents exercise the right of appeal to the school board.
- Be sure you know your facts and double-check for accuracy. Don't accept a rumor without checking it out. The PTA can be a "fact-finder," but it should never be the pipeline for destructive rumors.
- If you speak on behalf of anyone other than yourself, e.g., the PTA, be sure your statement is authorized as a presentation of the association's views. Make clear for whom you speak.
- Don't try to work "around" the board. The board is a legal body, and a single board member, no matter how friendly or promising, cannot act on behalf of or commit the entire board. Only the board as a whole, acting within its legal responsibility, can take binding action.
- When speaking to the full board, stay on the subject and within the time limit. Be courteous and firm, but never abusive. Be prepared to be challenged or questioned; know your facts.
- School trustees are volunteers, just as we are in PTA.
- Mutual respect of this commitment builds a strong working relationship.
- Keep in mind that a good PTA-school board relationship is a continuing one. Don't get involved only in a crisis; stay on top of school board actions all during the year. And remember, even a school board likes to know when it has done something right!

common sense and courtesy make a joint effort work.

As in most partnerships, success depends on the degree of civility with which the rules are applied, and the motivations of the partners. These reminders may help PTA units maintain good relations with the school board.

guidelines for PTA curriculum committees

develop a charge

- Communicate with superintendent and board of education as to purpose, reason for review.

makeup of committee

- Administrators, parents, students, teachers and school board members.
- Council curriculum committees should include the above with a broad representation of parents representing all the schools in a district.

committee should

- Have a written mission statement.
- Be a standing committee or exist for at least a year.
- Review existing programs.

- Set goals, procedures and timetable.
- Define the scope of its work.
- Be familiar with state mandates re: curriculum.

suggested criteria – curriculum should

- Provide for individual development.
- Lend itself to a variety of instructional approaches and materials.
- Respond to the school district's mission statement and policies
- Fulfill mandated requirements.
- Have flexibility to make changes when necessary.
- Make optimum use of available personnel and resources.
- Be aligned with assessment procedures.

committee might (after research, observation and decision)

- Develop recommendations to be submitted to administration and school board.
- Suggest in-service training for teachers.
- Help create better understanding through parent education.
- Work on handbooks for parents for improved communication.
- Disseminate information on any changes that may come from these recommendations.
- Request presentations of new or ongoing programs.
- Become familiar with programs for children with special needs.

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notes

guidelines for PTA curriculum committees, con't.

(this might be a separate committee)

resource materials

- “School Law: A Handbook for School Board Members,” NYS School Boards Association, 24 Century Hill Drive, Suite 200, Latham, NY, 12110- 2125
- Curriculum manuals
- Standardized and other related test results; textbooks and other instructional material
- School district’s mission statement and related policies
- School budget
- New York State Standards/ Assessments
- Curriculum frameworks or guides
- State (and local) report cards

summary

- Clarify issues
- Establish goals
- Gather facts
- Propose action, if necessary
- Decide on a plan
- Carry out the plan