

**VIRGINIA PTA
LEADERSHIP TRAINING CONFERENCE**

What Every Officer Should Know

**Official Training Document of Virginia PTA
July 2008**

Purposes of PTA

- To promote the welfare of children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

Mission of PTA

- To support and speak on behalf of children and youth in the schools, in the community and before governmental bodies and other organizations that make decisions affecting children;
- To assist parents in developing the skills they need to raise and protect their children; and
- To encourage parent and public involvement in the public schools of this nation.



To customize the PTA logo above, type the name of your unit, council or district in place of “Virginia”, using either Arial Black or Helvetica Black font, plain or bolded, in whatever size you think looks best, depending on the length of the name. If you need help, email the Virginia PTA Technology chairman, technology@vapta.org

PTA STRUCTURE

LOCAL UNIT

- Grassroots of PTA!
- Operates as a self-governing body, adhering to ALL non-profit law and regulations.
- Linked through its membership to Virginia PTA and National PTA.
- Works at the school site, home, and community for all children.
- Bylaws are based on Local Unit Bylaws of the Virginia PTA.

COUNCIL

- Must have at least three local units in membership to be a chartered council.
- Provides conference (programs and leadership training) and cooperation of efforts for local units within the council.
- Provides **advisory** assistance to local units and assists school educators and PTA presidents in understanding their partnership roles as leaders in education.
- Assists in organization of new local units.
- Serves as a communication link between local units and district by relaying news, information, and instruction from school officials, District PTA, Virginia PTA, and National PTA.
- Bylaws are based on Council Bylaws of the Virginia PTA.

DISTRICT

- Geographical division of the Virginia PTA.
- Includes all PTA members within the district.
- Promotes the work of the Virginia PTA and National PTA.
- Organizes local units and councils.
- Provides leadership training.
- Conducts legislative meetings and workshops.
- Liaison between Virginia PTA and councils and local units in the district.
- District Director represents constituent associations on the Virginia PTA Board of Managers.

STATE

- A branch of the National PTA and includes all PTA members within the state. President represents Virginia PTA on the National Council of States.
- Adopts bylaws not in conflict with National PTA Bylaws.
- Provides leadership training to local units, councils, and districts.
- Holds annual meeting (convention) to conduct business.
- Provides publications and informative materials.
- Develops projects and programs that are statewide in scope.
- Promotes National PTA projects and programs.
- Publishes and distributes the Virginia PTA *Bulletin* and publishes electronic newsletters—*Virginia PTA Voice*, *Capitol News*, and Legislative Action Alerts. Maintains the Virginia PTA website.
- Takes action to support/oppose legislation dealing with children's health, education, and welfare through Virginia PTA Legislation Program.

NATIONAL

- Includes all that join local unit PTAs.
- Establishes policies.
- Advocates nationally and internationally for children and youth.
- Develops and funds projects which are national in scope.
- Holds an annual convention.
- Holds a national legislative conference.
- Adopts bylaws which establish purposes, policies, and structure of National PTA.
- Develops programs and leadership materials.

PTA Noncommercial Policy

All PTA bylaws, whether national, state, district, council or local, require the association to be noncommercial.

1. PTAs are prohibited under federal law from engaging in substantial business activities that are unrelated to their tax-exempt purposes, which are legally defined as educational and charitable.
2. PTAs should not endorse products, companies, or foundations.
3. PTAs may accept and acknowledge contributions of sponsors of PTA programs.
4. PTAs may accept advertising as long as it stays within postal regulations (no more than 10 percent of the total document including any self-advertising such as conventions and other events) and does not jeopardize the Purposes and non-profit status of the PTA.
5. PTAs should familiarize themselves with local, state, and federal regulations and requirements regarding licensing and liability before sponsoring or conducting public events.

PTA Nonsectarian Policy

All PTA bylaws, whether national, state, district, council or local, require the association to be nonsectarian.

PTA welcomes into membership people representing a diversity of cultures, ethnic backgrounds, and political and religious beliefs. The Purposes of the PTA acknowledge the importance of a spiritual life in the development of children and youth. As an association, PTA has the right to offer inspirational messages to open or close its meetings, but such messages by PTA leaders or invited religious leaders should be inspirational rather than sectarian, recognizing that in this pluralistic nation not all members share the same beliefs. Poetry, quotations from great men and women, uplifting anecdotes, and moments of quiet meditation can be used.

PTA Nonpartisan Policy

All PTA bylaws, whether national, state, district, council, or local, require the association to be nonpartisan in that it cannot support or oppose a political candidate.

These bylaws provisions address the prohibitions and limitations regarding political and legislative activity engaged in by entities that are tax exempt under IRS Section 501(c)(3). Failure to comply with these restrictions could result in a PTA losing its federal tax-exempt status. PTAs may propose, support, or oppose legislation needed to achieve the Purposes.

Additional information about our 501(c)(3) association can be found in “*Money Matters*” *Quick Reference Guide* from National PTA

I AM A PTA BOARD MEMBER

As an incorporated organization, board members or directors of a non-profit association owe important duties to the organization they serve. These duties are imposed by the courts and by state and federal statutes.

Directors of non-profit corporations or associations owe three basic common-law duties to the organization:

- Duty of Obedience
- Duty of Care
- Duty of Loyalty

Collectively, these are known as fiduciary duties or fiduciary responsibilities. A break of these duties may lead to personal liability, loss of tax-exempt status, or both.

Duties of Obedience

Board members or directors owe a duty of obedience to the non-profit organization stated Purposes and to applicable law. This duty requires directors to carry out the association's Purposes as set forth in its Articles of Incorporation or Bylaws. It is to ensure that the organization conducts its activities in a lawful manner. This duty is an overriding one and contains as its components the duties of care and loyalty.

RATIONALE: The duty of obedience arises because donors, members and the general public rely on the organization to use gifts, funds, image and influence for the organization's stated Mission. Tax-exempt status is an important benefit and carries with it the responsibility of always acting for the public good. Thus to maintain that status and retain the confidence of donors, members and the general public, non-profit organizations must fulfill their Purposes as set forth in their organizing documents and in applicable law.

BREACH: A breach of the duty of obedience may arise from any of the following:

- ❖ Failure to monitor legal changes and requirements
- ❖ Failure to monitor activities
- ❖ Failure to monitor use of the organization's funds
- ❖ Unauthorized change or expansion of activities

COMPLIANCE STRATEGIES: Board members and directors should honor the duty of obedience by doing the following:

- ❖ Regularly review the organization's Articles of Incorporation or Bylaws and applicable laws (Filing appropriate incorporation forms, filing required financial reporting documents, keeping informed of IRS regulations).
- ❖ Adhere to state bylaws revision requirements (every 5 years) in order to ensure the organization's compliance with all legal requirements and ensure inclusion of changed or new requirements within association bylaws.

Duty of Care

An important component of the duty of care is the ability and duty of managing carefully and responsibly the financial affairs of the association. This involves ensuring that the books and records of the organization are accurate and complete, even if this duty is delegated to others. In addition, board members have the duty to pay attention to tax deadlines and other reporting requirements. Non-profit directors or organization board members also owe a duty of care to the organization and have a duty to set in good faith, in a prudent manner, that which furthers the best interests of the organization.

Three components define the duty of care:

- ❖ Good Faith: Board members and directors must exhibit fair dealing, openness and honesty of intention.
- ❖ Prudent Person: The board member or director must act as a hypothetical “average” director would, applying sound practical judgment, without special skills and without excessive caution.
- ❖ Attentiveness: The director/board member must be attentive to the operations of the organization and must be alert to potential problems.

BREACH: A breach of the duty of care may arise from any of the following:

- ❖ Neglect of duties
- ❖ Neglect of the organization’s legal and financial affairs
- ❖ Careless, frivolous decisions based on the lack of information

COMPLIANCE STRATEGIES: Board members should do the following to ensure that they meet appropriate standard of care:

- ❖ Take the position seriously (i.e.attend all training opportunities; adhere to deadlines)
- ❖ Attend all meetings of the PTA (general membership and board meetings)
- ❖ Avoid hasty action and rash decisions
- ❖ Spend time keeping informed and be familiar with organizational matters (i.e. review materials such as financial reports, minutes and make special inquiry if information is lacking)
- ❖ Carefully select and monitor those to whom responsibilities have been delegated
- ❖ Manage institutional funds wisely and prudently
- ❖ Understand the relevant statutory provision regarding non-profit corporations and associations and ensure the organization’s compliance with them
- ❖ Ensure that financial books and records and other necessary reports are accurate and complete
- ❖ Know the state and federal reporting requirements and ensure that the organization completes them on time
- ❖ Know the requirements of maintaining tax-exempt status and ensure that those demands are met
- ❖ Seek expert advice for matters beyond individual expertise

Duty of Loyalty

Board members and directors have a duty to give their undivided loyalty to the mission of the organization they serve. This duty of loyalty includes the duty to further the organization's goals and not the director's own best interests. Directors must not take advantage of corporate opportunities for their own gain. They also must not use "inside information" obtained as a result of their status as directors for their own private benefit.

The duty does not mean that a director can never benefit from an activity of the non-profit corporation. There may be situations in which furthering the corporation's best interest has the effect of benefiting a director. To avoid breaching the duty of loyalty, however, the interested director must fully disclose his interest to the board and must not participate in board's discussion or voting on issue.

RATIONALE: The duty of loyalty has special significance because of the federal prohibition on personal inurement from the activities of a tax-exempt organization (#Article IV, Basic Policies, section f). One of the key prerequisites to the attainment of tax-exempt status is that no part of the earning of the tax-exempt organization can "inure to the benefit of . . . members, directors, trustees, officers or other private persons". A breach could place the organization in jeopardy of losing its tax-exempt status.

BREACH: A breach of duty of loyalty may arise from any of the following:

- ❖ Use of position or information to gain a personal advantage
- ❖ Use of position or information to further the interests of third persons
- ❖ Excessive compensation or benefits

COMPLIANCE STRATEGIES: Board members/directors should do the following to ensure that they meet the appropriate duty of loyalty:

- ❖ Act only in the best interest of the organization
- ❖ Support board action
- ❖ Fully disclose any conflict of interest
- ❖ Obtain approval by disinterested directors or board members
- ❖ Recuse themselves from any discussion of or vote on any potential board action in which they have a conflict of interest

HIERARCHY OF LAWS

Laws of the Land

- ❖ Federal Regulations - Internal Revenue Service (IRS)
- ❖ State Laws/Regulations
- ❖ Non-profit Regulations
- ❖ Corporation Codes/Regulations
- ❖ State's Attorney Office
- ❖ State Gaming Commission
- ❖ Department of Taxation (sales tax exemption and use)

Laws of the Organization

- ❖ Articles of Incorporation
- ❖ Bylaws
- ❖ Standing Rules
- ❖ Parliamentary Authority (Robert's Rules of Order Newly Revised, 10th Edition)
- ❖ Approved Motions
- ❖ Written Procedures
- ❖ Tradition/Historical

PROTECTING THE "PUBLIC TRUST"

THE VIRGINIA CONGRESS OF PARENTS AND TEACHERS (VIRGINIA PTA) AND ALL LOCAL UNITS AND COUNCILS IN THE VIRGINIA PTA/PTSA ARE 501 (C) (3) ORGANIZATIONS (NON-PROFITS) UNDER THE INTERNAL REVENUE CODE AS PRESCRIBED IN OUR BYLAWS, **ARTICLE III: PURPOSES, SECTION 3 WHICH STATES,

"Section 3. The organization is organized exclusively for the charitable, scientific, literary or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding Section of any future Federal tax code (hereinafter "Internal Revenue Code")."

All officers, board members and members of the association should be aware of the fact that we are a 501 (c) (3) association defined by IRS Code and enjoy the many benefits that come with this privilege. PTA is no different than the many non-profit, charitable organizations that we often donate funds to as private citizens over the year. We have responsibilities as a non-profit because of the public trust that goes hand in hand with a charitable association. Every PTA officer and board member needs to be aware of the benefits we receive from this privilege and just as importantly, the responsibilities this public trust brings to each association.

BENEFITS OF BEING A NON-PROFIT

- ◆ We do not pay taxes to the federal government on our gross receipts.
- ◆ Individuals, organizations and businesses may donate money to our organization. These donations are tax-exempt to the donors.
- ◆ In Virginia, local units organized under the Virginia PTA are eligible for Virginia sales tax exemption. In order for constituent associations to receive Sales and Use Tax Certificate of Exemption letter, local units and councils MUST complete the process required by the Department of Taxation and Office of Consumer Affairs (effective July 2004). Similar records must also be filed with the Virginia PTA (See “Responsibilities of Being a Non-Profit”).
- ◆ Non-Profit status by the IRS is automatically granted to all local units and councils formed under the Virginia PTA/PTSA without any other requirement of the non-profit application, including non-profit application fees.

RESPONSIBILITIES OF BEING A NON-PROFIT

- ◆ We must adhere to our Purposes as defined under Article III in our Bylaws and follow IRS guidelines as noted under Article IV: Basic Policies.
- ◆ We are required to keep correct and orderly financial records as prescribed in our bylaws under Article V: Relationship with National PTA and Virginia PTA/PTSA, Section 4 and pursuant to Virginia Code 57-49.5 and 57-49.B.
- ◆ Each local unit and council is required by the IRS to conduct a fiscal year-end audit. (Virginia Code also requires audit when gross exceeds a specific amount. Details for audit requirements are found under Article VI: Auditing Procedures).
- ◆ Local units and councils must file an e-postcard with the IRS. If a unit grosses over \$25,000 in a fiscal year they must file a form 990EZ. If they gross \$100,000 or more in a fiscal year they must file a form 990.
- ◆ Due to the process **required** by the Virginia Department of Taxation and Consumer Affairs for all non-profits, local units and councils must complete the 501(c)(3) Determination Letter Request Form (available at vapta.org or on the LURG CD) and follow all instructions for obtaining Virginia Sales Tax Exemption.
- ◆ Constituent associations must maintain their “unit in good standing” status. This means their first payment of dues for fiscal year must be paid or postmarked no later than December 1 and the bylaws of the unit must be current.

ONE OF THE MOST IMPORTANT RESPONSIBILITIES OF PTA OFFICERS IS THE PROTECTION OF THE UNIT’S ASSETS AND THEIR MEMBERSHIP. INSURANCE IS A **MUST!**

WHY PTA INSURANCE?

General Liability

PTA fundraising activities can expose third parties to potential injury during PTA sponsored events. In addition, any time parents, teachers or children attend a meeting or function, the location or actual site where the meeting or function is being held (such as the school) may waive liability for injured parties while on their property. Further, if school property is damaged during an event, the school may hold the PTA liable for repairs. This coverage is called Premises Liability and is included in the Liability Plus Portion of the PTA Insurance Program. Prior to any PTA event it is important to check with your insurance carrier to be sure that the event and all activities planned for the event will be covered under your policy. Having sufficient coverage for the event is required and while the type of event you are planning may not be excluded from your liability coverage, sufficient coverage for the event is mandatory. Without sufficient coverage, the PTA may be placing the personal assets of the officers and other members of the association at risk. Your insurance carrier is the only entity that can provide the PTA with sufficient liability coverage information.

Another coverage within the General Liability policy, which the PTA may find valuable, is the coverage for libel and slander. Should a PTA official render an opinion concerning an individual either publicly during a meeting, or in private, which improperly defames that person's character and a defamation claim is brought against the PTA, then the libel and slander coverage would apply.

Fidelity Bond

Now that you have safely raised funds on behalf of your PTA, you have a responsibility to protect those funds. This should be done through using standard, acceptable accounting practices, keeping accurate and clear financial records and the purchase of fidelity bond insurance. Several members of your board may be involved in the handling of these funds. Whether it is cash, checks, or other securities, these funds could easily be stolen or improperly deposited into their own personal account. Typically, this type of situation occurs when a trusted member of the PTA simply "borrows" the money for "just a little while" until they get their personal finances squared away and then "will just pay it right back". Unfortunately, the money is never seen again. A fidelity bond is also called Employee Dishonesty Coverage. It does just as the name implies; it provides the insurance needed to protect the monies the PTA members have worked so hard to earn from well meaning but dishonest volunteers.

Directors and Officers

Individual directors and officers serving as PTA board members and those acting upon their directives are prime candidates for directors and officers coverage. Some of the basic coverage includes Legal Actions & Allegations of Mismanagement, Misappropriation of Funds, Misrepresentation, Dissemination of False or Misleading Information and Wrongful Acts. These professional liability exposures are covered when a notice of claim is filed or received. D&O coverage provides the extra piece of protection to insure the safe management and smooth direction of your PTA.

A PTA will sometimes have a tendency to rely upon school district liability insurance for protection. This generally proves to be untrue. If a PTA is covered by school district insurance, they should obtain a "Certificate of Insurance" as documentation for PTA files.

When using vendors at activities that provide rides and similar activities, ALWAYS OBTAIN A "CERTIFICATE OF INSURANCE" FROM THE VENDOR VERIFYING THEIR

INSURANCE COVERAGE. This “Certificate of Insurance” covers the vendor—IT DOES NOT COVER THE PTA.

Having insurance does not mean that every activity the unit undertakes will be covered. There may be exclusions within your policy that prohibits or restricts certain types of activities. There may be what the insurance industry would consider “non-traditional PTA activities” which are not excluded from policy but for which the \$1,000,000 general liability policy is not sufficient to provide adequate coverage for the particular event.

DO NOT ASSUME YOUR UNIT IS COVERED FOR ALL ACTIVITIES. Contact your insurance carrier and obtain an “Insurance Program Summary and Loss Control Guide”.

THE TIME TO ASK QUESTIONS IS BEFORE THE EVENT OR ACTIVITY.

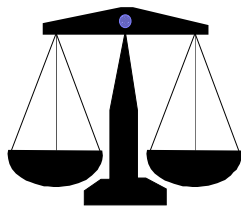
VIRGINIA PTA POSITION ON FUNDRAISING

The PTA can be the means through which community standards are established. Therefore, its own standards must be consistently held high. This can be done through unfaltering allegiance to National PTA policies and principals. They are an expression of a desire to respect the rights of others and to act for the common good. When programs are being formed, or fundraising projects being chosen, commercialism, sectarianism, or other policy violations should be avoided. The greatest service PTA can perform is to promote support for quality public education.

- A PTA is NOT a money making or money raising organization.
 - The purpose of a PTA is to promote the welfare of children and should be primarily carried out through educational means.
 - Educating members to better perform their duties in connection with children.
 - Educating parents and teachers to have a better understanding of each other's goals and viewpoints so they can cooperate more closely.
 - Educating the community to the needs of the school and of other community enterprises working for the welfare of children and youth.
 - Educating the community to work against factors harmful to children and youth.
- Material aid to the school is not the function of a PTA.
 - The PTA serves as a liaison to help the community understand the problems and needs of education, and once the need is established, the purchase of materials and equipment for public schools should come from the public budget.
 - PTAs should provide service, not material things for the school or children.
- Primary emphasis of the PTA should be on the promotion of the Mission and Purposes.
- Funds raised should be for a definite, pre-determined, and budgeted purpose.
- The exploitation of children for fundraising activities should be avoided.
 - Children may be included in programs that are an outgrowth of class work or projects.
 - The regular school day schedule should not be disrupted, nor should the children be expected to give up their free time.
 - Protect the instructional time of children.
 - Fundraisers which promote vendors/companies using school time for assemblies for training of students as sales persons for their products should **NOT** be planned.
- The name of PTA (or names of its officers) shall not be used to benefit commercial organizations.
 - Before embarking on any joint financial endeavor with commercial concerns as a fundraising activity, you should consider whether the arrangement can be viewed as an endorsement of a product, company, or foundation.
 - Any aspects of endorsement must be avoided.
- PTA funds should be used for parent/teacher work and it is not proper to raise money for PTA activities and then donate it to another organization.
- Do not engage in frequent fundraising programs as this leads to a departure from primary purpose of the association, which is to educate its members about the needs of children, not to raise funds.
- Protect your tax exempt status.
 - Disregard of the prohibition against substantial commercial activities could result in having to pay taxes, penalty, or the ultimate sanction, loss of tax exempt status.
 - Local PTA units that engage in extensive fundraising activities not associated with their primary purposes become liable to file IRS Form 990T when unrelated business income exceeds \$1,000 and pay a tax on unrelated business income.
- Do not engage in any fundraising activities, which might interfere with the accreditation of your school.

Adopted by the Virginia PTA Board of Managers, November 5, 1992

BALANCING FUNDRAISING WITHIN IRS GUIDELINES



In order to assist PTAs in conducting business within IRS required regulations, National PTA has developed the following general guideline:

The 3-to-1 Rule

“When planning the year’s activities, PTAs should use the 3-to-1 rule. For every fund raising activity, there should be at least three non-fund raising projects aimed at helping parents or children, or advocating for school improvements.”

2008-2009 National PTA Money Matters Quick-Reference Guide, page 48

The IRS regulation for non-profit activities is a ratio of 85-15. 85% of PTA activities should be related to the Purposes of our association. When auditing non-profits for Purpose related activities, the IRS uses two tests:

The Organizational Test – IRS examines Bylaws to see if association is in compliance with Purposes.

The Operational Test – IRS evaluates association activities, source of income and receipts. Emphasis is placed on how money is raised as compared to how funds are spent.

SUGGESTED/ACCEPTED USE OF PTA FUNDS

Leadership Development Training and Activities

PTA funds should be used for purposes that further PTA work and is a legitimate expense as defined by IRS guidelines. Some examples would be funding delegate attendance to Leadership Training Conferences, State Conventions, PTA Day at the General Assembly, district and council workshops, regional trainings and legislative meetings to train current and future PTA/PTSA leaders. Attending National PTA events is also encouraged. On the local level, funding can be provided for unit officers/representatives to attend School Board and City Council/Board of Supervisors meetings to monitor the decisions of these bodies or when appropriate and approved by membership, when speaking before these bodies requesting improvements in the well being of youth.

Programs

PTA funds should be used to inform and educate parents and teachers on issues relating to the education, health, welfare, and protection of children. (Building Successful Partnerships training, parenting workshops that concentrate on issues such as SOLs, NCLB, children health and juvenile protections issues, etc.). Funding should be provided for presentation of the Virginia PTA Preliminary Proposed Legislation Program (PPLP) and final Proposed Legislation Program (PLP) to membership for review and approval. Voting by membership on PLP is a requirement in local unit bylaws (Article V, “**Section 16.** The Virginia PTA/PTSA Legislation Program shall be voted on by individual local unit members and recorded on official tally sheets. Local unit tally sheets shall be forwarded to District Directors prior to the pre-convention Board of Managers meeting.”)

Cultural Arts Programs/Assemblies

PTA funds should be used to provide various educational programs for children and youth. (Contact your school principal for assistance in obtaining appropriate programs for children and their families). The National PTA Reflections program should be a project of every PTA or PTSA in Virginia.

Financial Assistance

PTA funds should be used to assist student participation in educational related field trips and summer enrichment programs.

Recognition Awards for Student Achievement

PTA funds should be used to help recognize student achievement through awards for all accomplishments (including establishing student Scholarship Funds).

Curriculum Enhancement

PTA funds should be used for the enhancement of the current school curriculum and could include sponsorship of programs such as a Science Fair, Career Day, Mathematics Fair, Book Fair, etc.).

Equipment

PTA funds may be used to support school programs that are or will become integral parts of the curriculum. PTAs should pay the vendor directly for these items when possible. If they must purchase through school division, a copy of invoice **MUST** be supplied for PTA financial records. Prior to planning to raise funds for equipment, make sure the school system will allow the item. Once the purchase is made a unit should officially donate, in writing, the equipment to the school.

After-school Programs*

PTA funds may be used to support after school programs for children and youth. The PTA must work with the principal/school division to develop the types of programs to be offered after school. The safety and supervision of students must be a top priority. PTAs may provide and directly pay for any supplies necessary for the implementation of after school programs.

*PTA insurance covers all students involved in after school programs and all volunteers who assist with after school programs. However, PTAs are not employers and PTA insurance does not cover individuals who are paid for services such as teaching after school programs. Workmen's compensation insurance is required by law in the state of Virginia for any group or organization that employs individuals. PTAs may donate funds to the school/school division for the purpose of paying school employees (teachers, teacher assistants, custodians, etc.) for their time given to after-school programs, etc. Cash payments are not an acceptable form of PTA payments. Receipts must document all PTA payments. PTAs must obtain a receipt from school to verify the use of the funds for the salaries of school employees. PTAs may utilize outside providers of services. The PTA pays the employer for services and the employer pay their employees involved in offering these services.

SUCCESSFUL OFFICERS

- Create an environment of mutual respect in which everyone feels free to participate fully.
- Put the goals of the organization before personal interest.
- Delegates and accepts responsibility as necessary.
- Appreciates and acknowledges the contributions of everyone.

THE RIGHT APPROACH

For Parents and Teachers

- **Give compliments and encouragement.** Acknowledge the strengths, talents, achievements, and behaviors of teachers, children, and parents. Show appreciation for what they do.
- **Be “on the same page.”** Share with each other the wishes and worries about a child as well as observations about the child’s interests and motivations. Exchanging information allows parents and teachers to help each other provide the child with the best learning environment possible at home and at school. Set expectations and goals together at the beginning of the school year.
- **Solve it early.** Initiate a conversation before there is a negative issue or crisis. Be open to any information, positive or negative. Maintain privacy. If you have trouble talking together, let the other person know why, and try to resolve it before going to the principal for help.

For PTA Leaders, Administrators, and Teachers

- **Go where you need to be.** Actively recruit parents’ support. Communication is better between home and school if parents are active in the school. Reach out to parents, and meet them on their turf. Make home visits, or hold a meeting at a community center, park building, or different places of worship.
- **Get to know each other informally.** Provide and seek out informal opportunities to talk with and get to know parents, administrative staff, and teachers.
- **Speak the same language.** Use support staff, other parents, or family advocates as translators at meetings and conferences. Send home all information in the parents’ native language. Use caution in using educational acronyms in communications.
- **Share information.** Provide clear information regarding course expectations, student placement, school activities, student services, and optional programs. Give out information on school reforms, policies, discipline procedures, assessment tools, and school goals, and include parents, teachers, or administrators in any related decision making. Regularly distribute student work for parents’ comment and review.

For Everyone

- **Make an appointment.** Give teachers, parents, or administrators some notice you would like to meet with them and the topic. Ask them how much contact they would like to have, and how they prefer to communicate (e-mail, phone, notes, or in person).
- **Leave your “baggage” at the door.** Put previous negative experiences with teachers, parents, or administrators behind you, and go into each new interaction with an open mind and positive attitude. Focus on how to help your children to achieve.

CONFLICT IS THE STUFF OF LIFE

Conflict comes about from differences – in needs, values and motivations. Sometimes through these differences we complement each other, but sometimes we will conflict. Conflict is not a problem in itself – it is what we do with it that counts.

It is important that we do something because whether we like it or not, conflicts demand our energy. In fact, an unresolved conflict can demand a tremendous amount of our attention. We all know how exhausting an unresolved conflict can be. It is not always easy to fix the problem but a great energy boost can come when we do. Resolving conflict requires skills.

Conflict Resolution (CR) skills enable us to bypass personal differences and to open up to possibilities. The skills of CR draw us closer to other people, as we jointly search for fair solutions and balanced needs. It involves a powerful shift from adversaries to cooperative partners. In this shift each person benefits.

These skills are also the tools for building friendship and intimacy. A whole new level of trust develops as people learn “we can work it out”. Relationships become more fulfilling and supporting.

CONFLICT RESOLUTION SKILLS

1. Win Win Approach

- The Win/Win Approach is about changing the conflict from adversarial attack and defense, to cooperation. It is a powerful shift of attitude that alters the whole course of communication.
- Change course by beginning to discuss underlying needs, rather than only looking at solutions.
- Addressing underlying needs means building solutions that acknowledge and value those needs, rather than denying them.
- Attack the problem, not the people.
- Even when trust between parties is limited, the Win/Win approach can be effective.
- What is my real need here? What is theirs? Do I want it to work for both of us?

2. Creative Response

- The creative response to conflict is about turning problems into possibilities. It is about consciously choosing to see what can be done, rather than staying with how terrible it all is. It is affirming that you will choose to extract the best from the situation.
- Listen – attentively to the other person. Reflect Back – to the other person, their feelings, and perhaps the content of the problem with a single statement of acknowledgment periodically. Explore – to unfold the difficulty in more depth.
- What opportunities can this situation bring?
- Rather than “how it’s supposed to be, can I see possibilities in “what is”?”

3. Appropriate Assertiveness

- The essence of appropriate assertiveness is being able to state your case without arousing the defenses of the other person. The secret of success lies in saying

how it is for you rather than what they should or shouldn't do. "The way I see it...", attached to your assertive statement, helps. A skilled "I" statement goes even further.

- Use an "I" statement when you need to let the other person know you are feeling strongly about the issue. Others often underestimate how hurt or angry or put out you are, so it's useful to say exactly what's going on for you – making the situation appear neither better nor worse (i.e. your "I" statement should be "clear")
- An appropriate "I" statement is highly unlikely to do any harm. It is a step in the right direction, is sure to change the current situation in some way, and can/will open up to possibilities you may not yet see.
- What do I want to change? How will I tell them this without blaming or attacking? Is this a statement about how I feel, rather than what is right or wrong? (soft on people, hard on the problem)

4. Cooperative Power

- When faced with a statement that has potential to create conflict, ask open questions to reframe resistance. Explore the difficulties and then re-direct discussion to focus on positive possibilities.
 - It's too expensive > Compared to what?
 - We've tried that already > What was the outcome?
 - This is the only way to do it > Yes, that's an option. What else could we consider?
 - It's disastrous > What would make it better?
- Am I using power inappropriately? Are they? Instead of opposing each other, can we cooperate?

5. Designing Options

- Clarifying tools:
 - Chunking – breaking the problem into smaller parts.
 - Researching – more information; resources; constraints.
 - Goal-setting – what is the outcome we want?
- Generating tools
 - The obvious solution – to which all parties say "yes".
 - Brainstorming – no censoring, no justifying, no debating
 - Consensus – build a solution together
 - Lateral thinking – have we been practical, creative?
- Negotiating tools
 - Maintain current arrangements – with trade-offs or sweeteners.
 - Currencies – what is it easy for me to give and valuable for you to receive?
 - Trial and error – try one option, then another.
- Selection
 - Is it built on a win/win approach?
 - Does it meet many needs of all parties?
 - Is it feasible?
 - Is it fair?
 - Does it solve the problem?
 - Can we settle on one option or do we need to try several?

6. Negotiation skills

- Five basic principles:
 1. Be hard on the problem and soft on the person.
 2. Focus on needs, not positions.
 3. Emphasize common ground.
 4. Be inventive about options.
 5. Make clear agreements.
 - Reframe –ask a question to reframe. (e.g. “If we succeed in resolving this problem, what difference would you notice? Please tell me what you heard me/them say. Request something be re-stated more positively.)
 - Respond not React – manage your emotions. Let some accusations, attacks, threats or ultimatums pass. Make it possible for the other party to back down without feeling humiliated.
 - Re-focus on the issue – Maintain the relationship and try to resolve the issue. Focus on being partners solving the problem, not opponents. Divide the issue into parts. Address a less difficult aspect when stuck.
 - Identify Unfair Tactics – Change locations, seating arrangements, etc. Call for meeting to end now and resume later perhaps to give an opportunity for reflection.
7. Broadening Perspective
- Just as we are unique and special, so are other people. We all have distinctive viewpoints that may be equally valid from where we stand. Each person’s viewpoint makes a contribution to the whole and requires consideration and respect in order to form a complete solution. This wider view can open our eyes to many more possibilities. It may require us to change the mind chatter that says: “For me to be right, others must be wrong.”

ADDITIONAL RESOURCES

The following **E-learning Courses** are available through National PTA

www.pta.org > Leadership Resources, > Leadership Training > E-learning Courses. (Enter the username and password on your PTA membership card):

Conflict Management
Effective Advocacy for Your Child
Grant Writing
Parliamentary Procedure
Planning and Goal Setting
Planning Your PTA Year
Preventing Theft in Your PTA NEW!!!!
PTA Basics
Running a Successful Program
Writing and Proposing PTA Resolutions

There are multiple programs and resources that local unit members can download and utilize within their association on the National PTA website pta.org , Members Only Section.

Contact information for Virginia PTA officers, standing committee chairs and district officers is located in the Virginia PTA *Bulletin* and is titled, “Directory – Virginia PTA/PTSA Board of Managers and State Office Staff.” Contact information is also available on our Virginia PTA website at vapta.org .

Contact our state office staff by dialing 1-866-4vakids (toll free) or by e-mail at info@vapta.org. The mailing address of our state office is: 1027 Wilmer Avenue, Richmond VA 23227.

PTA CALENDAR/CHECKLIST

SPRING	SUMMER	FALL	WINTER
<p style="text-align: center;">April-June</p> <p>Recognize outstanding contributors to the PTA by giving them one of Virginia PTA's Honorary Awards.</p> <p>Honor all volunteers.</p> <p>Attend district legislation meeting.</p> <p>Honor teachers during Teacher Appreciation Week.</p> <p>Hold General Membership Meeting (per bylaws) to hold election of officers and installation ceremony.</p> <p>Remind treasurer that all dues collected since March 1 must be sent to the state office by June 30.</p> <p>New PTA year begins.</p> <p>Hold transitional board meeting with old and new boards.</p> <p>Assume duties at end of transitional meeting.</p> <p>Send all forms including the list of new officers' names/ addresses to the State Office (VA Code). Due annually, generally by June 15th.</p> <p>Review and update all procedure books, develop procedure books for new positions. If lacking in current positions, begin a procedure book for each.</p> <p>Make sure the outgoing president arranged the audit for the previous year financial records.</p> <p>Send names/addresses of officers to other PTA groups (council, district PTA) or where applicable School Board to receive mailings.</p> <p>Register for Virginia PTA's Leadership Training Conference.</p>	<p style="text-align: center;">July-August</p> <p>Attend Virginia PTA's Leadership Training Conference.</p> <p>Familiarize yourself with bylaws. (Obtain copy from state office if necessary).</p> <p>Budget Committee meets to develop budget and prepares to present to the Executive Board.</p> <p>Hold a meeting of the Executive Board to go over all action items and approve the budget that will be presented to the General Membership.</p> <p>Confirm with principal when PTA information needs to be available for the school's Welcome Back Packets.</p> <p>Membership cards and Local Unit Resource Guide CD will be mailed from Virginia PTA, based on last year's membership.</p> <p>Look for and share mailings from National, State, District, and Council with your board.</p> <p>Prepare an article for your newsletter and Welcome Back Packet.</p> <p>Appoint a committee to review/revise the bylaws.</p> <p>Be sure officers and committee chairmen have received procedure books from predecessor. If unavailable, start them.</p> <p>Check for council and district training events held throughout the year.</p> <p>Prepare a calendar that includes executive board and general membership meetings, PTA special events and president/principal meetings.</p>	<p style="text-align: center;">September- November</p> <p>Make sure the Membership Committee has all the information and cards needed for a successful membership campaign. All members MUST receive a membership card.</p> <p>Make sure the Reflections Chair has all the information for a successful Reflections Program.</p> <p>Hold first General Membership Meeting and vote on the proposed PTA budget and adopt the audit.</p> <p>Send copy of audit and 990 to the Virginia PTA office.</p> <p>Obtain listing of District and Council events. Make plans to have your unit represented at ALL.</p> <p>Choose and register delegates to attend Virginia PTA's Convention.</p> <p>Hold Legislation Meeting to have your general membership vote on Virginia PTA's Proposed Legislation Program and send the tally sheet to your District Director.</p> <p>Attend Virginia PTA's Convention.</p> <p>Remind your treasurer that all dues must be sent to the state office by December 1 so your local unit remains in "Good Standing". (Mail early!)</p>	<p style="text-align: center;">December-March</p> <p>Enjoy the holidays and rejuvenate yourself for the remainder of the year.</p> <p>Make reservations for PTA Day at the General Assembly.</p> <p>Advertise the need for members to serve on the Nominating Committee.</p> <p>Elect your Nominating Committee, checking bylaws for the information about how, when, where, what, and number to serve.</p> <p>Ask your Executive Board to let the Nominating Committee know of their intentions for the coming year.</p> <p>Attend Virginia PTA Day at the General Assembly.</p> <p>Remind your treasurer that dues collected since December 1 must be in to the state office by March 1.</p> <p>Review your PTA budget.</p> <p>Arrange for the audit of the books when they close at the end of the fiscal year.</p> <p>Attend your District Annual Meeting held in March or April.</p> <p>Have the Nominating Committee report the slate of officers to the executive board and general membership per your bylaws.</p> <p>Remind board members to update their procedure books and include any recommendations for next year.</p> <p>NOTE: Year-round school PTAs may modify this calendar to meet their needs. Dates referenced are general dates. You must refer to your own bylaws for specific requirements.</p>