

**Wisconsin**  
**PTA**<sup>®</sup>  
*everychild.one voice.*



# Leaders Guide

## TABLE OF CONTENTS

Introduction	
President/Vice President.....	1
Procedure Book .....	4
Association Meetings and Programs .....	5
Agendas .....	7
Minutes .....	8
Parliamentary Procedure .....	9
Parliamentary Authority Dealing With Controversial Issues.....	10
Officers and Chairmen .....	11
Committees.....	12
Finance - Budget, Treasurer's Reports, Audits.....	12
Bylaws .....	15
Legislative Activity .....	16
Advocacy .....	16
PTA Recognition.....	17
Your PTA Dues at Work.....	18

## **INTRODUCTION**

Congratulations! You are now the local unit or council president and a part of the largest association in the nation that advocates for the education, health and welfare of children and youth.

If you are like most new presidents, your question is, "What do I do next?" This handbook is designed to help you acquire a working knowledge of PTA. PTA is characterized by continually changing volunteers, and it is essential that leadership skills continue to be developed if PTA is to be effective.

This handbook is designed to help you do the following:

- Set goals and plan your PTA year.
- Plan and run PTA meetings.
- Understand and use your bylaws appropriately.
- Develop your leadership skills.
- Develop future leaders for your PTA.
- Apply best practices that can help you PTA run smoothly and be an effective advocate for children.

This handbook is designed to be a primary resource to you, your board and members. Wisconsin and National PTA offer many additional resources and support.

To be an effective PTA the leaders and members need to be familiar with the history, resources and programs of PTA. The more you and your members know the better job your PTA will do for children.

## **PRESIDENT/Vice President**

The president of a local PTA/PTSA unit has the privilege and responsibility to lead the PTA toward specific goals chosen by its members in harmony with the Objects and Policies of the National and the Wisconsin PTA to which the local unit is linked by its membership and its bylaws. The President is both presiding officer and administrative officer.

The vice president would assume the duties of the president in the event of the president's resignation until the position is filled in accordance with the bylaws. The vice president also should be prepared to aid the president in accordance to the bylaws, represent the president as requested, and preside over meetings in the absence of the president or if the president wishes to debate an issue.

### **WHAT TO DO WHEN ASSUMING OFFICE**

- Make sure all members on the PTA Board belong to your PTA.
- Be sure the Officer Information Sheet, listing current officers, has been sent to the State office.
- Read and review the unit's bylaws and standing rules, highlight quorums and important dates.
- Meet with your principal now and begin to develop a working relationship.
- Hold a brainstorming session with the new board. Review past unit activity, study National/State goals, set unit goals for the year and choose priority projects on which to concentrate. Evaluate present chairmanships and decide the number needed to carry out plans. Ask for suggestions of people to fill chairmanships, aiming for a balance of experienced new members on the board. Set your board and unit goals.
- Work with your new board to plan a meeting schedule, using your bylaws as a guide.
- Prepare a calendar of events for the year. Use your bylaws and PTA goals as a guide.
- Be sure to check your school/district calendar to avoid conflicts, if possible.
- Start recruiting and appointing chairmen and/or council delegates (if applicable).  
Meet with new board committees to begin plans for budget, program and membership enrollment.
- Have the proposed budget, fund raiser (if necessary), programs and other plans presented to the executive board for approval.
- Arrange for proper signatures for signing checks and have appropriate forms filed at the bank. Whether the new or the outgoing president presides at the last PTA meeting of the school year, a motion is in order to authorize the executive board to pay necessary summer bills.
- Make sure treasurer's books have been audited according to your bylaws. Complete and forward the audit report to the State Office by November 1<sup>st</sup> to be in good standing.

### **JUNE AND JULY**

- Help board members secure procedure books and materials from their predecessors.
- Work with chairmen individually or in a group to discuss responsibilities, review material and check supplies.
- Study your own procedure book and materials from the outgoing president. (see page 5)

### **AUGUST**

- Select delegates to send to Wisconsin PTA Leadership Conference.
- Hold executive board meetings as necessary.
- Presidents receive a SUMMER PACKET from the Wisconsin PTA. READ ALL MATERIAL AND PASS along summer packet information to appropriate officers and chairmen. Make additional copies, as needed (i.e. award criteria, convention/conference dates, etc.)

- A member of the Wisconsin PTA Board of Directors may be invited to your local board meeting to discuss the summer packet and/or to answer any questions you may have regarding PTA.
- Work with committee in charge of activities before school opens to plan events such as a welcome for teachers, student registration, etc.
- Work with membership chairman for Membership Kick-off flyers, membership envelopes, etc.
- Order additional subscriptions, as necessary, to: Wisconsin Parent Teacher, and Our Children for officers and the teacher's lounge.
- Confer with legislative chairman to study issues and subjects of interest to the members and arrange time on the agenda to present legislative information and updates at each meeting.
- Meet with school office staff for their input (i.e. family and/or class counts, printing deadlines, regulations, etc.)
- Remind treasurer to send per capita portion of dues to Wisconsin PTA.

### **SEPTEMBER**

- Meet with membership chairman and treasurer. Establish a procedure for a proper accounting of membership cards, money and forms.
- Prepare first fall meeting:
  - Check with program and hospitality chairman about final arrangements.
  - Work with newsletter and publicity chairmen for meeting notice and publicity.
  - Make an agenda for the meeting and stick to it.
  - Begin and end the meeting on time.
- Urge board members and members of your unit to attend state PTA workshops, conferences and convention.
- Review programs for the year.
- Have calendar/program booklet distributed with copies to council (if applicable).
- Be sure membership invitations are sent to all parents and staff. Make sure certain enrollment activities do not interfere with school routine and have been approved by the principal. Recruit grandparents, businesses and other interested adults.
- Remind treasurer to send per capita portion of dues to Wisconsin PTA.
- Start promoting National PTA Reflections Project.
- Begin making plans for State and National PTA awards and recognition programs.

### **OCTOBER**

- Remind treasurer to pay per capita portion of dues to Wisconsin PTA. (First installment of State and National portion is due by November 1st. to be in good standing)
- Plan for monthly meeting using same guidelines listed in September.
- See that membership cards are sent home promptly.
- Promote National PTA Reflections Project.

### **NOVEMBER**

- Continue enrollment of new members and forward the per capita portion of dues to the Wisconsin PTA state office.
- Continue promoting National PTA Reflections Project.
- Plan for monthly meeting using same guidelines listed in September.

## **DECEMBER**

- Work with program committee on plans for Founders' Day (February 17).
- Plan for monthly meeting using same guidelines as listed in September.
- Begin preparing entries for State and National PTA awards and recognition programs. Verify due dates!
- Continue promoting National PTA Reflections Project

## **JANUARY**

- Send any proposed resolutions, bylaw changes, and retirements from the Wisconsin PTA Legislative Program and Basic Policy to the Wisconsin PTA Office.
- Prepare to send delegates to the Wisconsin PTA Legislative Conference.
- Continue with your programs and projects.
- Check bylaws for dates and follow bylaw procedure to elect a nominating committee.
- Plan for monthly meeting using same guidelines as listed in September.
- Submit Reflections entries as directed by Wisconsin PTA Reflections program criteria.

## **FEBRUARY**

- Celebrate Founders' Day, the anniversary of National PTAs founding, February 17.
- Send in unit Membership Award Applications, due March 1.
- Make sure your unit dues are all sent to the Wisconsin PTA Office by March 1st.
- Plan for monthly meeting using same guidelines as listed in September.

## **MARCH**

- Select delegates to attend the Wisconsin PTA Convention. The number of voting delegates is determined by your unit's membership total sent in to the Wisconsin PTA Office on March 1st. You will be notified by the State Office as to how many votes you have.
- Discuss at the association (general) or board meeting, the proposed Wisconsin PTA resolutions, bylaw changes, and retirements to the Legislative Program and Basic Policy. Delegates to convention vote according to your unit's decisions.
- Plan for monthly meeting using same guidelines as listed in September.
- If possible, reprint resolutions to be presented at convention in newsletter or a flyer home to all members.

## **APRIL - MAY**

- President and unit delegates attend the Wisconsin PTA Convention. Attendees should report to your PTA upon your return and share materials, workshops, convention folders and exhibit information.
- Send in any new membership dues to the Wisconsin PTA Office.
- Plan for monthly meeting and hold elections of new officers.
- Submit Officer List with newly elected board to the State Office.

## PROCEDURE BOOK

What is a procedure book?

- A notebook containing those materials considered important to the work of each officer/chairman.
- A tool kit for you.
- A record and helpful hints from your predecessors.

A loose-leaf binder works well. It is a convenient cover and pages can be easily added. Section dividers can help since some of your most valuable materials don't fit in a notebook, an expandable cardboard file may also be needed. Remember that a procedure book is the property of the association and not the individual using it during the year.

WHAT DOES IT CONTAIN?

### 1. TITLE PAGE

- Name of office or chairmanship with accurate job description.
- Name of association, council or region.
- Name of officer or chairman, with address, telephone number and term served.
- Name of previous officers or chairmen, with addresses, telephone numbers and term served.
- Space for names of successors (to provide a continuing record).

### 2. ASSOCIATION INFORMATION

- List of officers and chairmen, with addresses and telephone numbers.
- List of room representatives, faculty representatives and other contacts, with addresses and telephone numbers.
- Bylaws and Standing Rules.
- Current budget and local newsletters
- Calendar of events

### 3. OUTLINE OF WORK

- National - copy of material from Annual Resources Guide.
- State - specific job duties
- Region and Council - information and materials
- All correspondence pertaining to your office and chairmanship.

### 4. SPECIAL INFORMATION RELATING TO OFFICE OR CHAIRMANSHIP

- Materials from workshops, conferences and convention.

### 5. REPORTS

- Copies of reports to association, council or region.
- Detailed account of special activities for this office or chairmanship with suggestions for procedure in future projects.
- If a committee has placed it's work before the association through a sketch, play or posters, the nature of the activity and the results should be listed.
- Successes and failures, too, should be noted. A successor needs to know why a particular idea or project did or did not succeed.
- Any other resource material you have found to be helpful.
- A detail budget report for the position/committee

## ASSOCIATION MEETING AND PROGRAMS

Why have a meeting?

- To increase knowledge.
- To solve problems.
- To generate ideas.
- To sharpen skills.
- To change attitudes.
- To increase membership.
- To increase parent/family involvement.
- To share experiences and information.

What makes a meeting successful?

- Planning ahead.
- Preparing the agenda and sticking to it. Consider publishing agendas prior to meetings.
- Performing necessary functions.
- Reviewing the action taken (Was the meeting effective?)

What should good meetings provide?

- The three I's of productive programming include:
  - Information
  - Instruction
  - Inspirationor a combination of all three.
- Good content to meet that group's needs.
- A presentation within the prescribed time allotment.
- Some benefits for participants and their children.

How many meetings should you have?

- Your bylaws will tell you the minimum number of meetings to have in a year.
- Schedule enough meetings to provide continuity, but not so many that you promote monotony.

How much business should you transact?

- Keep as brief as possible.
- Give members an opportunity to participate in the decision making.
- Streamline minutes and financial reports. Duplicate and distribute or post whenever possible.
- Begin on Time

Who is responsible for conducting the meeting effectively?

- The president is. This requires a delicate balance between following the agenda and being sensitive to members' needs. Special effort needs to be made to keep on task.

Are other types of meetings held too?

- Study groups
- Grade-level gatherings
- Special information sessions
- Work parties (to prepare materials, etc.)

What are the Program Chairman's responsibilities?

- To plan the program for the year (allowing for flexibility)
- To check the calendar to avoid conflict with other school events
- To contact program participants and provide necessary details: time, location, type of audience, length of presentation

- To recognize "competition" from TV and other local activities and to plan topics that help parents to help their children
- To increase attendance by selecting stimulating topics and issues
- To work with the program committee (The more people know what's happening, the more things will happen)

What options are available for the program format?

- Audiovisual presentations: films, videos, tapes, etc.
- Lectures - presented by speaker alone, or followed up by panel interviews.
- Panelists representing different viewpoints on a common topic
- Student panels of varying ages and grade levels
- Brainstorming sessions may be selected at random or pre-arranged may be assigned the same or different topics may be helpful in involving persons who are hesitant to speak out in a large audience

Where can you find information regarding available resources?

- For openers, RELAX! Sources of free speakers and materials are plentiful
- Check your state and county agencies
- Look into professional organizations
- Contact your local, county and state education community
- Don't overlook your legislators
- Contact council, region or state PTA leaders, publications or use Our Children. Each issue contains a program guide.
- Wisconsin PTA Website ([www.wisconsinpta.org](http://www.wisconsinpta.org))

## AGENDAS

Where can I get an agenda? Everybody says I should have one!

- "Model" agendas are available as resources, but YOUR agenda is up to you. Be creative and plan your own, which is an orderly procedure for conducting your meeting.
- The agenda should be arranged in advance by the president. Refer to previous minutes for old business and action items.
- It should be provided to all board members so they may read the information and be ready to take action.
- A PTA meeting should be managed in a manner that allows the business of the association to be completed in a speedy and effective way.
- An association meeting should last no longer than 1 hour and 15 minutes.

## SAMPLE AGENDA

Call to Order

Pledge of Allegiance

Approval of Minutes

Treasurer's Report

Correspondence

Reports of committees, officers and chairmen, including principal, faculty representative and student representative(s) on the secondary level

Unfinished Business

New Business

Announcements

Adjournment

## MINUTES

"I'm exhausted after a meeting! As secretary, do I have to write EVERYTHING down?"

- No. Minutes should be as brief as possible.
- Action items, recommendations and brief summaries of reports should be recorded.

What should minutes contain?

- The minutes should be entered in a minute book which is bound.
- Place and type of meeting (executive, board, association, special).
- Date, time of call to order and adjournment.
- Full name of presiding officer.
- A complete copy of the treasurer's report.
- The exact wording of each motion (the secretary may request the maker of the motion to put it in writing), who made the motion (full name) and what action was taken (carried, failed, amended, withdrawn).
- The order in which business was presented.

How are the minutes presented?

- Minutes of the previous meeting are read or distributed for voted approval.
- The minutes should be signed by the secretary.
- The word approved should be written at the end of the minutes. Corrections should be made in the margin. Never erase or strike out.

**MINUTES ARE THE LEGAL RECORD OF PTA MEETINGS. THEY SHOULD BE ACCURATE AND COMPLETE – AND KEPT PERMANENTLY.**

## PARLIAMENTARY PROCEDURE

We don't have a parliamentarian. Is that bad?

- Not Bad, but a parliamentarian can be helpful to the president when questions of procedure arise. All presidents should become familiar with parliamentary procedure.

Why should we use parliamentary procedure?

- Parliamentary law is an orderly set of rules for conducting meetings of organized groups for the purpose of accomplishing their goals fairly. Use of parliamentary procedure ensures:
  - Justice and equality for all
  - Maintenance of order
  - Consideration of one thing at a time
  - Rule of the majority
  - Rights of the minority

All the time, I hear "Robert says." Who is Robert?

- For PTA, ROBERT'S RULES OF ORDER NEWLY REVISED, latest edition, is the parliamentary text that governs our association where our own bylaws do not apply.

How do we introduce business at our meetings?

- Usually by a motion to take action introduced by a member, seconded, discussed and **voted** upon.
- Remember, only persons who are members are legally qualified to make motions, discuss and vote.

## PARLIAMENTARY AUTHORITY IN DEALING WITH CONTROVERSIAL ISSUES

Controversial issues sometimes come up and disruptions can occur at PTA meetings. The PTA that is informed and alert can best handle these situations.

What background information is helpful?

- The president and the parliamentarian, and as many other officers and chairmen as possible, must have a working knowledge of parliamentary procedure and how to apply it effectively.
- The president has the responsibility of presiding in a non voting capacity during the entire meeting - the program presentation as well as the business portion.

What should the presiding officer do in dealing with difficult interruptions?

- Keep cool and calm at all times. An unruffled attitude reflects that you are in control.
- Allow the "interrupter" to make his/her statement, listening carefully to see where the subject might fit into the topic under discussion. If the point made is irrelevant (or not "germane") to the motion on the floor, the chair should point out that fact.
- Be courteous in dealing with the interruption. In spite of apparent negative reaction from the audience, the person speaking may have a valid point or a suggestion worth investigating.
- If the discussion - and the situation in general - appears to be getting out of hand, the chair should remind the group that:
  1. The PTA meeting is being held in a public facility and is subject to open meeting laws.
  2. People are entitled to their opinions.
  3. PTA bylaws, policies and procedures under which it operates. (Policies should specify the time allowed for an individual to speak to an issue.)
  4. While PTA respects the rights of individuals, it also has a responsibility to conduct business in a fair and dignified manner.

If the "disruption" goes on and on, what can the president say or do?

- "Mr. \_\_\_, your point is well taken, and if you had contacted me in advance, we could have placed it on the agenda. However, we do have a program commitment and an obligation to carry it through. Perhaps we could speak later." (Then continue with the agenda.)
- "Ms. \_\_\_, we appreciate your comments on this subject, and if there is no objection, the chair would like to appoint a committee (now or following the meeting) to study the issue, research the information and report back at a future meeting." (It's a good idea to include that person on the committee.)
- "Mrs. \_\_\_, the issue you raise doesn't fall within the nonpartisan (or whatever) policy of PTA. However, we do appreciate your sharing the information with us."
- (When tempers flare) "The chair recognizes that there are many different opinions, but let's hope we can disagree 'agreeably.' That is, after all, the democratic process, isn't it?"
- (When the situation is getting out of hand, don't pretend everything is all right. Instead of becoming flustered, inject a sense of humor.)
  - "My mother said there'd be days like this!"...or
  - "I wonder how they'd handle this on TV drama !!"...or
  - "Let's call a truce - and look into the problem together."

Do remember, no one expects you, as president, to be perfect...only poised and prepared to carry through. The more executive board members who are familiar with parliamentary procedure - and how to use it - the more help you can count on in handling uncomfortable situations

## OFFICERS AND CHAIRMEN

Who serves on the board?

- The officers of the association.
- The chairmen of the standing committees.
- The school principal or his/her representative.
- The faculty representative.
- Student representative(s) for PTSAs

What are the responsibilities of officers and chairmen? (Your local unit bylaws include the board composition and duties of officers.)

- To accept the office/chairmanship only when willing to uphold the policies and abide by the laws of the National, Wisconsin and local PTA.
- To accept office only when willing to prepare oneself to fulfill the responsibilities of that office.
- To attend and participate in all meetings.
- To abide by the will of the majority.
- To respect the privacy of the business of the executive board.
- To refrain from using the association for personal financial gain or to vent personal grievances.
- To protect members' privacy by allowing **no** distribution of membership lists to outside interests.
- To give accurate, detailed accounts of all monies entrusted to them.
- To maintain a procedure book to pass on to one's successor. (see page 6)
- To resign if unable to perform the required duties of the office.

What basic group of chairmen may be needed to carry out the work of the unit? Examples:

- Membership
  - Budget
  - Education
  - Room Representative
  - Hospitality
  - Program
  - Legislation
  - Membership
  - Newsletter
  - Bylaws
  - Reflections
  - Health & Safety
  - Publicity
- ...and others as applicable.

Now that I have accepted the responsibility of an office or chairmanship, I'm SCARED! How can I possibly learn all the "Rules and Regulations" of PTA?

- What rules and regulations? Your bylaws serve as your guide. Be familiar with them and let them be your friend.
- Contact your council, region advisor or state board for guidance.
- Ask questions and share your opinions.
- Find out which materials have the information you need, but don't try to read everything at once!

How long do I have to keep all those old papers in that box under my bed?

- Look through them and keep those that might be of value or of historical importance.
- Most papers can be discarded after five years.
- Financial records are kept seven years, including the current year; secretary's minute books, unit charter, State and Federal Financial returns and history record books are kept forever.

## COMMITTEES

What can I do to get some help? I am so tired of doing everything myself.

- Appoint a committee to help you.
- Committees are formed to plan, promote and implement the activities of the unit.
- A committee should have a definite purpose and is subject to the directives of the membership.

How should a committee be selected?

- It may be appointed or elected.

How many committees do we have to have?

- The number of committees needed to carry on the work of the unit will depend upon the program, issues and activities (goals) for the year.

Are there any committees elected by the membership?

- This depends on the individual local unit. Your bylaws will tell you what committees, if any, and how.

## FINANCE, INSURANCE AND TAXES

What is a budget?

- It is a guide of what money your PTA hopes to earn and how you plan to spend it.

Why prepare a budget?

- To meet the needs of the year's activities as planned by your PTA.

Who prepares a budget?

- The budget committee is appointed by the president. The treasurer should serve as the committee chairman.
- It should be composed of an odd number of people including the treasurer, president (ex officio) and others.
- The committee:
  - Meets early in the year and reviews past budgets, income and expenditures.
  - Estimates needs of the association and their probable expense.
  - Estimates probable income from all sources.
  - Balances probable income with probable expenses.
  - Allows a contingent fund to cover unbudgeted items and emergencies.

What expenditures should the budget cover?

- The primary priority in any budget is to finance PTA activities, including, but not limited to:
  - Leadership Training
  - Programs
  - PTA Publications
  - Organizational Expense
  - Council and Region Functions
  - Newsletter Expense
  - Legislative Conference

- Officers and Chairman
- Operating Expenses
- Leadership Workshops
- Wisconsin PTA Convention
- Workshops

All PTAs are tax exempt for educational purposes, therefore, we do **NOT** advise PTA funds to be used for school equipment such as curtains, microwaves, playgrounds, etc., nor to subsidize any portion of the school district budget.

Why should our unit spend all that money to send someone to conferences, such as Leadership and Legislative?

- It is an investment in your PTAs future. Your unit is building a good foundation of knowledgeable and trained PTA leaders.
- Studies have shown that PTAs who take advantage of training/learning opportunities are stronger and more effective.
  - Leadership conference offers training for many different board positions
  - Legislative conference offers current information issues effecting children.

Why should our unit spend all that money to send someone to Convention?

- Your unit should be represented at convention in order to vote on important state PTA business, such as the legislative policies, bylaw amendments, resolutions, election of officers, etc.
- Through attendance at state convention, your unit is building a good foundation of knowledgeable and trained PTA leaders. The president, president-elect and other members should attend to get ideas, resources and other valuable information.
- The primary priority in any PTA budget is for organizational expenses and leadership development.

PTA is a volunteer organization, but do any PTA officers get paid?

- All PTA officers on local, state and national level are VOLUNTEERS and do not get paid.

How should funds be raised to meet budget requirements?

- Frequent solicitations of contributions from members are unwise. They are not only irritating to many, but may embarrass and drive away those who cannot afford them.
- The financial section of the Annual Resource Guide discusses the entire funds issues and provides some examples of fundraisers.
- It is advisable that children do not partake in door-to-door sales.
- All fund raising projects must be approved by a vote of the board and that vote must be recorded in the minutes, which should include:
  - A description of projects to be undertaken.
  - Person(s) responsible for the project.
  - Purpose for which the project's income will be spent. (All funds should be raised with a purpose in mind prior to raising them.)

Who approves the budget?

- The year's budget should be presented by the budget committee to the board for its consideration and recommendation to the association for adoption by the membership.

How do we allow for additional expenditures which arise after the budget is approved?

- The budget is amended by the board. (No one should be spending money over budget without the board's approval.)

How are bills paid?

- Pay everything by check. NEVER CASH.
- Sign only those checks that have been filled out completely. NEVER sign a blank check.

What is a voucher?

- It is an authorization form for the payment of a bill.
- After the board has approved payment of bills, the voucher authorizes the treasurer to issue the check.

How much money do we have to leave in the treasury for the next administration?

- The amount you feel is needed to begin the operation of the association
- How much did you need at the beginning of the year?

What is an audit?

- An audit of the books (treasurer's ledger and bank statements) ensures that receipts have been properly accounted for and expenditures made as authorized and in conformity with the unit bylaws and budget limitations.

How often should an audit be made?

- An audit of your PTA is to be done yearly and submitted to the State Office by November 1<sup>st</sup> to remain in Good Standing.
- It is strongly recommended that an audit be made whenever a financial officer resigns.

What should be the responsibilities of the PTA treasurer?

- Meet with outgoing treasurer. Obtain the audited books of the previous year.
- Secure the proper signatures on the bank signature card and file it with the bank.
- Give a receipt for all funds received and deposit all monies in the PTA bank account in a timely manner.
- Pay all bills of the association by PTA check only.
- Pay out money as approved.
- Submit a Treasurer's Report at the executive board and at all PTA association meetings. A copy should be given to the secretary for the minutes.
- Work closely with the membership chairman. The treasurer is responsible for mailing the state and national portion of the dues to the Wisconsin PTA office.
- Prepare an annual report for the end of the year and submit it to the association at the last meeting.
- Make certain that the association's books are audited as directed by the bylaws.
- Ensure that state and federal registration and reporting obligations are met.

## PTA BYLAWS

Why do we need bylaws? Where do you get a copy?

- Bylaws are designed to help the group function in an orderly manner.
- A copy of the bylaws should be in all officer's materials and each board member should have a copy.
- If there is no copy available, contact the Wisconsin PTA for a current copy.
- When updating your bylaws, use the fill in forms we have available. These fill in forms include the most current revisions made by either the Wisconsin PTA or the National PTA.

Our bylaws are not relevant to our present operation. How can we change them?

- Appoint a committee to study them and make recommendations.
- Give thirty days' notice to association members.
- Recognize a 2/3 vote is required to change the bylaws.
- Review and submit bylaws every three (3) years in order to be a PTA in good standing with the Wisconsin PTA.

BYLAWS ARE HARD AND FAST RULES THAT MAY BE AMENDED ONLY WITH PRIOR NOTICE TO THE MEMBERSHIP.

STANDING RULES ARE OPTIONAL DETAILS OF YOUR SPECIFIC UNIT'S PTA POLICIES THAT MAY BE CHANGED FROM ADMINISTRATION TO ADMINISTRATION OR FROM MEETING TO MEETING.

## LEGISLATIVE ACTIVITY

Why do we have it?

- Political action is an integral part of PTA work. Without political action, PTA could not implement its third object, "To secure adequate laws for the care and protection of children and youth."
- National and state PTA/PTSAs, speaking for children and youth, carry on an active, effective legislative effort.

On what is Wisconsin PTA legislative action based?

- Legislative Program and Basic Policies are based on the resolutions that are passed by the delegate body at the annual state convention, which are within the scope of the PTA program.

Why is PTA political action nonpartisan?

- It is based on principles and issues.
- It supports or opposes legislation - not individual candidates or political parties.

How can PTA encourage its membership to become involved in legislation?

- By helping members to be better informed.
- By suggesting they meet with elected and appointed officials.
- By communicating PTA positions.
- By urging them to write letters and to telephone legislators.
- By stressing the importance of the individual's right to vote.

How can PTA respond to a legislative alert?

- Establish and use a legislative "telephone tree."
- Within a few hours of a "call for action", literally hundreds of letters, post cards and telephone calls can be on their way to legislators.
- When a call requesting legislative action comes, the president or legislative chairman passes the message along to board members who can reach room representatives, who, in turn, contact additional PTA members and community people.
- Letters, post cards, emails and faxes are best as time permits, but often there is a need to react quickly so that legislators feel the impact of the PTA lobby within hours.

## ADVOCACY

What you do to improve laws, policies, and conditions on behalf of children is advocacy, whether in your community or at the state and federal levels.

What is Advocacy?

- National PTA defines advocacy as *the art of mobilizing individuals and local units to work with the state and National PTA to spark changes in programs and policies that benefit children.*

What is the difference between Advocacy and Legislative Activity?

- Legislative Activity is advocacy. It is working for changes in programs and policies that benefit children, usually before a governmental body or regulatory agency.
- Advocacy happens anytime adults speak up for children, whether the issues is playground policies, crossing guards, bus safety or anything that causes concern for the health and welfare of children.

### **OAK LEAF -- SPECIAL RECOGNITION AWARD**

- The Wisconsin PTA Special Recognition Award can be bestowed on any individual who has shown an active interest in the PTA.
- Any local, council, region and Wisconsin PTA can present this award to any individual who is deserving and has shown an interest in children and youth. This individual may be from other agencies or dedicated specifically to your PTA.
- Further information may be obtained from the Wisconsin PTA office.

### **WISCONSIN PTA HONORARY LIFE AWARD**

- The Wisconsin PTA Honorary Life Membership Award is the highest honor that can be bestowed by a PTA in the state of Wisconsin. It is one in which a unit, council, region or the Wisconsin PTA can honor any individual who has shown an active interest in PTA and its work.
- Persons from other agencies, such as education, health, etc., where there is excellent cooperation are eligible for an award.
- Further information may be obtained from the Wisconsin PTA office.

### **BROOKMIRE-HASTINGS SCHOLARSHIP**

- This scholarship is awarded to outstanding high school graduates who intend to pursue a career in the field of education.
- This scholarship is in the amount of \$1,000 and payable over a four-year period.
- History - The Emma Brookmire Memorial Fund was established in 1948 as a loan fund for college students in honor of Miss Emma Brookmire who was an outstanding teacher and also served as field secretary of the Wisconsin PTA. In 1963 this memorial fund was changed to a scholarship fund. In 1952 the Wisconsin PTA created a scholarship for promising high school graduates in honor of Mrs. Minnetta Hastings, a Past President of the Wisconsin PTA and the National PTA. In 1967 these two memorial funds were combined to form the Brookmire-Hastings Scholarship Fund.

### **NATIONAL PTA LIFE ACHIEVEMENT AWARD**

- This award is given to persons in recognition of their contributions to the welfare of children and youth.
- The award may be conferred by any PTA association. (Unit, Council, Region, State).
- The recipients need not be members of a PTA association, but should be persons who have served the concerns of children and youth faithfully and well in their communities.
- The request for this award should be sent to the National PTA office.

## **YOUR PTA DUES AT WORK**

When you join PTA...

- You will be joining a nationwide organization of volunteers.
- You will be a member of:

The unit, council (if in a council) and region in your area, the Wisconsin PTA, and the National PTA.

Annual membership dues include per capita to Wisconsin and National PTA. The remaining portion stays in the local unit. Dues may differ in amount in each PTA.

What services do your dues provide at the various branches of PTA?

### **AT THE UNIT**

Student Welfare  
School-Student Projects  
Parent-Education Study Groups  
Newsletters, Notices  
Publications  
Insurance  
Program Booklets  
Hospitality  
Convention Delegates  
Officers and Chairmen Expenses  
Organizational Expenses

### **AT THE REGION**

Student Welfare  
Region Newsletter  
Publications  
Leadership Training Projects  
Workshops and Conferences  
Hospitality  
Officer and Chairmen Expenses  
Administrative Expenses

### **AT THE NATIONAL**

Programs and Projects  
National Headquarters - Chicago  
Legislative Office - Wash. D.C.  
National Convention  
Officers and Chairmen Expenses (including legislative committee in Washington D.C.)  
Field Service  
Publications  
Special Projects  
Supplies  
Administrative Expenses

### **AT THE COUNCIL**

Student Welfare  
Community Projects  
Leadership Training  
Workshops  
Publications  
Material  
Newsletters, Notices  
Convention Delegate  
Hospitality  
Officers/Chairmen Expenses  
Administrative Expenses

### **AT THE STATE**

Special Projects/Programs  
Bulletin Newsletter Programs  
Legislative/ Leadership Conferences  
State Convention  
Officer/Chair/Administrative Expenses  
State Office in Madison  
Supplies/Resources/Mailings  
Field Service