

SECTION 2

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INTRODUCTION

BRIEF HISTORY

National PTA was founded on February 17, 1897, in Washington, D.C., as the National Congress of Mothers. Fathers and teachers joined in increasing numbers, so the name was changed in 1925 to the National Congress of Parents and Teachers. Alice McLellan Birney and Phoebe Apperson Hearst are the co-founders of the National PTA.

The National Congress of Colored Parents and Teachers was organized in 1926 in Atlanta with Selena Sloan Butler as founder. The National PTA helped set up the association and worked closely with the group, whose objects and child welfare goals were the same as its own.

The National Congress of Parents and Teachers and the National Congress of Colored Parents and Teachers united on June 11, 1970. The unified organization, continuing as the National Congress of Parents and Teachers (National PTA), serves all children with equal concern for all.

1897 – OUR FOUNDERS' VISION

Alice McLellan Birney and Phoebe Apperson Hearst founded an association – a nationwide movement – in a time when social activism was scorned and women did not have the vote. They knew there is no stronger bond than that between mother and child. Therefore, they felt it was up to mothers of this country to eliminate the threats that endangered children. They called for action in 1897 and more than 2,000 people responded – many were mothers, but fathers, teachers, laborers, and legislators also responded – all with a commitment to children.

From that first meeting in Washington, D.C., grew a groundswell of support. Problems were identified and strategies devised to resolve them. Through consistent hard work, sometimes after years of perseverance, the dreams became reality. Many of the items that we consider a regular part of public education are directly attributable to the work of our founders and those that followed in their footsteps:

- The creation of free kindergarten classes
- Child labor laws
- A network providing public health service
- Hot lunch programs
- A juvenile justice system
- Mandatory immunizations

Between 1897 and 1919, 37 state-level congresses were chartered to help carry out the work of the organization.

PTA HISTORICAL HIGHLIGHTS

1900s - Juvenile Justice and Child Labor Laws

Actions to curb delinquency, institute juvenile court system, and rehabilitation and probation undertaken.

1910s - Kindergarten

National Congress of Mothers recommended and lobbied for kindergarten to be made part of the American public school system.

1920s - Nationwide Children's Health Project

PTA cooperated with the U.S. Bureau of Education in a Summer Roundup of children to help parents identify and correct children's health problems before they started the 1st grade.

1930s - Nutrition and Emergency Services

PTA instituted a safety education program for school children. The rise of the automobile brought about special emphasis on bus safety and seatbelts, concerns that PTA continues to champion.

1940s - School Lunch Program

Mindful of children performing better in school when well nourished, PTA helped inaugurate a school lunch program on a nationwide basis.

1950s - Salk Polio Vaccine

A debilitatingcrippler for generations, polio struck thousands of school-age children each year. PTA helped combat the disease, by field testing of the Salk polio vaccine and later securing the polio vaccination for all school children.

1960s - Drug and Smoking Information

PTA encouraged schools to focus on the risks involved with substance abuse and created public service messages to educate parents and the general public about the dangers of addiction.

1970s - Merger and TV Media Violence

When National PTA merged with the National Congress of Colored Parents and Teachers in 1970, so did their identical mission to improve the lives of children. Additionally, violence on TV spurred PTA to speak out about what the effect programming had on children.

1980s - HIV/AIDS Awareness

The alarming rise in sexually transmitted diseases and the emergence of AIDS propelled PTA to create resources and programs to help parents talk frankly with their children about these issues.

1990s - Parent and Family Legislation

PTA created its National Standards for Parent/Family Involvement Programs, the benchmark used by dozens of organizations and governmental agencies to measure parent involvement. PTA was also a strong proponent of the Family Medical Leave Act, and the institution of National Education Goals to drive decisions about education for years to come.

2000 to Present - Parent Involvement/Building Successful Partnerships

PTA published "the" book on parent involvement, *Building Successful Partnerships*, to encourage parents to be an active partner with schools and teachers in the education of their children.

2010 the Georgia State Board of Education unanimously adopted the first statewide Parent Engagement Resolution endorsing the National Standards for Family-School Partnerships as the framework for how families, schools and communities should work together to support student success. The resolution can be used as a guide by local school officials to develop local school and district plans and policies.

2015 – PTA supports Reauthorization of Elementary and Secondary Education Act which was signed into law in December, 2015. This federal legislation replaced the previous version known as “No Child Left Behind” and was named the “Every Student Succeeds Act”. The law allowed more autonomy for states to design meaningful assessments, among other critical items.

PTA VISION, MISSION AND VALUES

Membership is open to anyone who believes in the mission and purposes of Parent Teacher Association. Individual members may belong to any number of PTAs and pay dues in each. Every person who joins a local PTA automatically becomes a member of both the state and national PTAs. PTA and its constituent organizations exist to achieve the Vision of PTA and fulfill the PTA Mission. Together we are a powerful voice for children. With your help, we can continue to work toward PTA's goals of a quality education and nurturing environment for every child.

PTA Vision: What the Future Will Look Like If PTA Accomplishes Its Mission

Every child's potential is a reality.

PTA Mission: The Overall Purpose of PTA

To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PTA Values: What PTA Stands For

- **Collaboration:** We work in partnership with a wide array of individuals and organizations to accomplish our agreed-upon goals.
- **Commitment:** We are dedicated to promote children's health, well-being, and educational success through strong parent, family, and community involvement.
- **Accountability:** We acknowledge our obligations. We deliver on our promises.
- **Respect:** We value our colleagues and ourselves. We expect the same high quality effort and thought from ourselves as we do from others.
- **Inclusivity:** We invite the stranger and welcome the newcomer. We value and seek input from as wide a spectrum of viewpoints and experiences as possible.
- **Integrity:** We act consistently with our beliefs. When we err, we acknowledge the mistake and seek to make amends.

PTA Purposes: Goals of PTA

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding

BASIC POLICIES OF PTA

The “Basic Policies” outlined in the Georgia PTA bylaws, in common with those of National, district, council and local unit PTAs, govern the activities of all PTAs. These policies ensure unity through the members’ commitment to our Purposes and help protect the association and its membership from exploitation.

- The association shall be noncommercial, nonsectarian and nonpartisan as described here:

Noncommercial Policy - 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. PTAs should not endorse products, companies, or foundations. PTAs may accept and acknowledge contributions of sponsors of PTA programs. PTAs may accept advertising as long as it stays within postal regulations and does not jeopardize the objects and nonprofit status of PTA.

Nonsectarian Policy - 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.

Nonpartisan Policy - All PTA bylaws, whether national, state, district/region, council, or local, require the association to be nonpartisan in that it cannot support or oppose a political candidate. However, PTAs may propose, support, or oppose legislation needed to achieve the objects, provided that those efforts do not exceed the limitations placed upon such organizations under the federal tax laws.

- The association shall work with schools and communities to provide a 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, state education authorities, and local education authorities.
- The association shall work to promote the health and welfare of children and youth, and shall seek to promote collaboration between families, schools and the community at large.
- No part of the net earnings of the association shall come to the benefit of, or be distributable to its members, directors, trustees, officers or other private persons except that the association shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II of the state bylaws.
- Notwithstanding any other provision of the bylaws, the association shall not carry on any other activities not permitted to be carried on by an association exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code, or (ii) by an organization, contributions to which are deductible under sections 170(c)(2) of the Internal Revenue Code.
- Upon the dissolution of the association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to one or more nonprofit funds, foundations, or organizations which have established their tax-exempt status under section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of the National PTA.
- The association or members acting in their official capacities shall not (directly or indirectly) participate or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its funds/activities to attempting to influence legislation by propaganda or otherwise.

PTA STRUCTURE AND ORGANIZATION

NATIONAL PTA

Membership is open to anyone who believes in our mission – *To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.* PTA is committed to being inclusive in its efforts to represent and assist all who nurture and educate children. It not only welcomes, but also actively seeks in its membership the widest diversity of cultures, races, ethnicities, creeds and economic and educational statuses. Individual members may belong to one or more PTAs and pay dues in each. Every person who joins a PTA automatically becomes a member of the state and National PTAs. *National PTA will often be referred to as PTA.*

Governance Structure

National PTA is composed of 54 state congresses and more than 20,000 local units in all 50 states, the District of Columbia, U.S. Virgin Islands, Puerto Rico and the Department of Defense Schools in Europe and the Pacific. National PTA, as directed by its board of directors, provides leadership, programs, support, and resources to its members at all levels of the association.

State PTAs are the liaison between the local PTA and National PTA, helping each to function effectively and to support and sustain the other.

PTAs at the local level are valuable assets to their school communities by providing educational and family engagement information, resources, events, and activities. They are linked to the state PTA and National PTA, forming a nationwide network of members working on behalf of all children and youth.

National Board of Directors

- Composed of twenty-nine (29) members; including National PTA officers, board member representatives elected by convention delegates as well as at-large members appointed by the president.
- Manages the affairs of the association
- Establishes policy and the legislative agenda
- Reviews and acts on reports and recommendations of National PTA committees, National Council of States, and staff

National Standing Committees

- Bylaws, Diversity, Field Service, Finance, Historic Preservation, Legislation, Membership, Nominating & Leadership Development, Resolutions, Resource Development, and Youth Involvement

National Council of States

- Composed of one member from each of the state congresses
- Identifies and prioritizes trends to guide the board in setting strategic direction
- Reviews and recommends issues related to organizational policy
- Identifies and recommends action on emerging issues, policies, and legislative trends

GEORGIA PTA

Georgia Congress of Parents and Teachers (Georgia PTA) was organized in 1906 and continues to be an important link in the total PTA structure. Celebrating over 100 years of advocacy for children, the 250,000 Georgia PTA members and nearly 900 local PTAs direct the efforts and activities for the association. Every individual who becomes a member of a local unit automatically becomes a member of Georgia PTA and National PTA.

Governance Structure

A board of directors governs Georgia PTA. According to its articles of incorporation, the Georgia PTA Board of Directors has the sole authority to manage the affairs of the corporation, except for the authority that is vested by the bylaws and convention body.

The relationship between local units, councils and district PTAs and Georgia PTA is set forth in the Georgia PTA Bylaws and in the charter that is issued by Georgia PTA.

Georgia PTA officers, elected by the general membership for a two-year term of office, are the Georgia PTA administrators. Business is transacted by delegates at the state convention, at Georgia PTA Executive Committee meetings and at Georgia PTA Board of Directors meetings. The state office located in Atlanta and under the general supervision of the President is supported by a small staff responsible for the day-to-day administration of the association.

Georgia PTA Board of Directors

- State officers (elected by the convention body in odd-numbered years)
- District Directors (elected at district conferences, typically in odd-numbered years)
- Chairpersons of the standing committees (elected by the State officers)
- Immediate Past Georgia PTA President (ex-officio)
- Any officer or Board of Directors member or Georgia PTA past president serving as a committee member of the National PTA residing in Georgia
- A Parliamentarian (appointed by the President)

The Board of Directors meets four times per year on a regular basis and has authority over the affairs of Georgia PTA between annual conventions. The Executive Committee performs duties between meetings of the Board of Directors.

There are a multitude of services available from Georgia PTA:

- Convention Leadership Training is offered annually to conduct the business of the association and provide PTA leaders with the knowledge to perform their duties. Additional opportunities for networking and training include the annual Advocacy Conference and PTA Day at the Capitol.
- The state office assists local units with incorporation renewals, membership dues processing, handling requests for information like EIN letters, bylaws, and more.
- PTA Universities are offered periodically, taught by experts in the field and on timely topics relevant to membership, leadership, financial viability and organizational effectiveness.
- State field service teams are available upon request to provide local on-site training. The function of these teams is to help strengthen local PTAs and councils by developing more effective leaders.
- Other services available include on-demand video training and publications such as the Voice (electronic magazine); materials and other resources/guides.
- In addition to providing local units and councils with up-to-date information on legislative issues, Georgia PTA also provides representation at the Capitol and works closely with numerous educational and issue-focused organizations.

DISTRICTS

Reference: Georgia PTA Bylaws, Georgia PTA Policy and Procedures/District Standing Rules

Georgia PTA divides Georgia into 13 geographical divisions called PTA Districts in order to establish a closer working relationship with councils and local units and to integrate the work of local organizations with state and national plans and activities.

Governance Structure

The Georgia PTA Executive Committee and Board of Directors govern the district PTAs and each district performs its work according to the Georgia PTA bylaws, Georgia PTA Policies and Procedures and applicable district standing rules. Districts have no legislative authority over constituent units unless the Georgia PTA Board of Directors has delegated such authority.

Board of Directors

- District Executive Committee, committee chairpersons, council presidents and members of the state PTA board of directors residing within the district.
- The Executive Committee of the district consists of the elected district officers and appointed Parliamentarian.
- Neither individuals nor local PTAs join the district. They automatically are part of a district because of their location in the state.

Responsibilities of District Director

- Elected by the membership within the district and serves a two-year term of office.
- Serves as the liaison from Georgia PTA Board of Directors and works with the councils and local PTAs in geographical areas of the state.
- Serves as a voting member of Georgia PTA Board of Directors, attends board meetings, and serves on committees as appointed or elected. Represented on the Executive Committee.
- Organizes the district board of directors. Plans and conducts fall and spring conferences in the district.
- Interprets PTA policies, plans, practices, publications and programs.
- Ensures schools of information or other workshops are conducted for PTA leaders.
- Promotes and charters new units and councils and strengthens those already organized.
- Promotes district publicity and fosters good public relations with superintendents and principals.
- Reports regularly on progress of the work in the district and files monthly report of expenditures with the state PTA.
- Integrates the work of local associations with state and national plans and activities.
- Services councils and local PTAs through consultation, instruction and visits.
- Presents recommendations to Georgia PTA Board of Directors from councils and local PTAs.
- Promotes membership of local units and supports campaigns, publicity, programs pertaining to membership.
- Promotes diversity and develops strong and active PTA leaders.

District Meetings

The district holds a conference meeting each fall and spring for the purpose of focusing on legislative issues and priorities, electing officers and such other business as may arise. The district director may plan other meetings for training or information per his/her plan of work throughout the year. Please visit the calendar on the website at www.georgiapta.org for a schedule of fall and spring conferences. **Local units and councils should send representatives to both conferences.**

DISTRICTS NUMERICALLY WITH COUNTIES

DISTRICT 1

Baker, Calhoun, Clay, Decatur, Dougherty, Early, Grady, Lee, Miller, Mitchell, Randolph, Quitman, Seminole, Terrell

DISTRICT 2

Atkinson, Ben Hill, Berrien, Brooks, Clinch, Coffee, Colquitt, Cook, Echols, Irwin, Lanier, Lowndes, Tift, Thomas, Turner, Worth

DISTRICT 3

Appling, Bacon, Brantley, Camden, Charlton, Glynn, Pierce, Ware, Wayne

DISTRICT 4

Chattahoochee, Harris, Macon, Marion, Muscogee, Schley, Stewart, Sumter, Talbot, Taylor, Troup, Webster

DISTRICT 5

Baldwin, Bibb, Bleckley, Crawford, Crisp, Dodge, Dooly, Houston, Jones, Laurens, Monroe, Peach, Pulaski, Twiggs, Wilcox, Wilkinson

DISTRICT 6

Bryan, Bulloch, Candler, Chatham, Effingham, Emanuel, Evans, Jeff Davis, Jenkins, Johnson, Liberty, Long, McIntosh, Montgomery, Screven, Tattnall, Telfair, Toombs, Treutlen, Wheeler

DISTRICT 7

Butts, Clayton, Coweta, Fayette, Heard, Henry, Jasper, Lamar, Meriwether, Pike, Putnam, Spalding, Upson

DISTRICT 8

Burke, Columbia, Glascock, Greene, Hancock, Jefferson, Lincoln, McDuffie, Richmond, Taliaferro, Warren, Washington, Wilkes

DISTRICT 9

Carroll, Cobb, Douglas, Haralson, Paulding, Polk

DISTRICT 10

Fulton

DISTRICT 11

DeKalb, Newton, Rockdale

DISTRICT 12

Banks, Barrow, Clarke, Elbert, Franklin, Gwinnett, Habersham, Hall, Hart, Jackson, Lumpkin, Madison, Morgan, Oconee, Oglethorpe, Rabun, Stephens, Towns, Union, Walton, White

DISTRICT 13

Bartow, Catoosa, Chattooga, Cherokee, Dade, Dawson, Fannin, Floyd, Forsyth, Gilmer, Gordon, Murray, Pickens, Walker, Whitfield

COUNCILS

Reference: Council Leadership Handbook and Council Bylaws

Georgia PTA organizes and charters groups of three or more local PTAs in cities, counties, or communities to promote the basic policies of PTA and for the purpose of unifying and strengthening PTA activities in communities and schools with common interest. Councils enable local units to collaborate on projects that an individual unit could not accomplish alone. They provide support and assistance to the local units within their area.

Governance Structure

Each council is governed by council bylaws approved by the Georgia PTA Board of Directors. The council Board of Directors manages the affairs of the council in the intervals between membership meetings.

Board of Directors consist of elected officers, chairpersons of standing committees and appointed parliamentarian.

Council services include:

- Identify schools that desire to form a PTA and forward information to the state PTA.
- Assist the District Director in the organization of newly chartered PTAs according to state bylaws.
- Inform people of the need for group action through the united effort of local PTAs.
- Promote the use of PTA publications, programs and projects.
- Assist the local units in understanding and carrying out action requested by resolutions adopted at Georgia and National PTA conventions.
- Build local unit and public support for local, state, and National PTA legislative action.
- Provide opportunities for PTAs to address advocacy issues.
- Unify and strengthen local units, and provide leadership development and training.
- Enhance communication among local units, the council and the state.
- Work with the District Director to develop a cooperative relationship with the school district administration and represent the interests of PTA before school districts, appropriate organizations or advocacy groups.
- Provide a forum for public information and debate on issues affecting children and youth, for candidates for public office and for legislative and public policy matters.
- Work in cooperation with Georgia PTA to develop procedures for assisting local units when school district structure is changed (merging PTAs).

Council Meetings

Regular meetings of the Executive Committee and Board of Directors are held with the date and time to be fixed at the first meetings of the year.

Council General Membership Meetings

Regular meetings of the general membership are held at least three (3) times during the school year. Dates and times of meetings shall be determined by the Executive Committee and announced at the first regular meeting of the year.

Any PTA member may attend the council general membership meeting. However, the voting body of the council consist of the board of directors, the president of each member local PTA or his/her alternate; two (2) delegates or their alternates, the superintendent of schools or his/her alternate; and the principals of schools having units in council membership or their alternates. Council bylaws specify the number of delegates from each unit. Delegates are selected by the method chosen by their units and vote as instructed by their units, unless authorized to vote according to their own judgment.

LOCAL PTA

Reference: Local Unit Bylaws

A Parent Teacher Association (PTA) or Parent Teacher Student Association (PTSA) is a self-governing unit, chartered by the Georgia PTA and part of the National PTA, which plans its programs and activities to meet the needs of children and youth in the local school community. *The success of the entire association depends upon the loyalty and effort made by each local PTA.* The strength and the effectiveness of PTAs depend on the interest and participation of individual members and in the efforts of informed and dedicated leaders.

Governance Structure

The affairs of the PTA/PTSA are managed by the Board of Directors in the intervals between local unit PTA/PTSA general membership meetings and governed by local unit bylaws approved by the Georgia PTA Board of Directors.

Board of Directors consist of elected officers; the chairmen of standing committees; the principal of the school or a representative appointed by the principal; and a parliamentarian, appointed by the President.

Meetings

- Local unit PTA bylaws require that PTAs have at least three general membership meetings during the school year (Article XIII, Section 1).
- The dates and times of the meetings are determined by the executive committee and announced at the first regular meeting of the PTA year.
- Meetings should be held in order to meet the needs of the membership which include:
 - Approving the budget, adoption of auditing committee report and programs to educate and inform parents (at the start of school)
 - Election of the nominating committee (minimum 30 days before election date)
 - Election of officers (month stated in bylaws)
 - Meetings to approve budget and bylaw amendments (when necessary) at any of the three required meetings or at another scheduled meeting
- **Only PTA members of your local unit during the current membership year (July 1-June 30) have the right to vote at PTA meetings.**

Organize a PTA

Georgia PTA requires the following to organize a PTA/PTSA:

- A minimum of 25 members (15 for Pre-K or Community PTA);
- Membership Application returned to state PTA office accompanied by the state and national portion of membership dues as specified by Georgia and National PTAs;
- Two copies of the “fill in the blank” bylaws sheet, submitted for state approval; and
- List of officers submitted to Georgia PTA.

Local Unit Number (LU#)

Upon approval of bylaws, all forms returned, and dues payment to the state office for processing, National PTA assigns the new PTA a local unit number. As long as the unit is affiliated with National PTA, this number never changes. You can find this number (example: 00123456) on the label of any material received from National PTA. This number is important and should be kept with your permanent records. Membership cards and all Georgia PTA forms require a local unit number. If you are unsure of your local unit number, please contact the state PTA office or your district director for this information.

Employer Identification Number (EIN)

To identify nonprofit or 501(c)(3) associations, each PTA is assigned an EIN as required by the IRS. Georgia PTA completes the necessary paper work and applies to the IRS for each unit's number when each PTA unit is organized. You should **never** share your EIN number with any other association or individual.

If you are unsure of your EIN number, please contact the state PTA office, your district director, or the Georgia PTA website, for this information. Please note: From time to time, your PTA may be required to verify its nonprofit status and/or EIN number (e.g. applying for a grant, opening a bank account). If this situation arises, call the state PTA office and request an EIN letter for your PTA.

Local Unit in Good Standing and Meeting Core Requirements

In the bylaws, Georgia PTA defines a local unit *in good standing* as one that meets the following requirements:

- Pays State and National dues on a monthly basis;
- Has approved bylaws on file at the state office;
- Submits an annual audit report to the state office by the last business day of September;
- Submits annually to the Internal Revenue Service (IRS) the appropriate form 990 by the applicable IRS due date and the IRS Verification Form to the state office after filing;
- Pays Council dues (if part of a council)

Local units must be in good standing in order to participate in the Reflections Program; apply for Georgia or National PTA scholarships and/or grants (including Georgia PTA scholarships for students); submit reports and be eligible for awards; and attend state or national convention as voting delegates.

In addition to being in good standing, Georgia PTA encourages all PTAs to be incorporated and have insurance coverage to meet core requirements.

Dues and Membership

The amount of dues is stated in the local unit bylaws, and the membership year is July 1 to June 30. At the beginning of the school year, local units should conduct a membership drive, but continue to encourage others to join throughout the year. **Membership dues may be accepted at any time.** A member may enroll in more than one PTA by paying dues to each PTA and thus becomes a voting member at multiple local units.

Membership in each local PTA is open, without discrimination, to anyone who believes in and supports the Mission and Purposes of the National PTA. The membership card shows that dues have been paid to the local PTA and includes membership in the state and national PTAs as well.

The annual individual membership dues include three portions:

National portion, as provided in local bylaws.

State portion, as provided in state bylaws.

Local portion, as provided in local bylaws.

Georgia and National PTA keep their portions of the dues nominal to make membership for all interested individuals possible in each PTA in which they desire membership. The state and national portions of dues must be collected for each person enrolled as a member.

Payment of Dues

Reference: Treasurers' Guide

Individual members pay dues directly to the local unit. The local treasurer keeps the records of national and state portions of dues separate from the general funds belonging to the local unit. The local unit treasurer sends the state and national portion of the dues and a Dues Transmittal Form to the state office at the end of every month in which dues are collected.

Contributions to Georgia PTA scholarships, memorials, endowment funds, incorporation fees and the like may be included in the same check with membership dues. (Use the Donations Transmittal Form in the Treasurers section of this leadership resource.)

The membership chairperson is responsible for maintaining a list of all members that have joined their PTA unit and working with the treasurer to ensure the accuracy of reporting membership dues. This list is used for accuracy of voting delegates eligibility during local unit business.

Membership Cards

- Are available for pick up by local PTA presidents (or their designee,) while attending Georgia PTA's annual Convention and Leadership Training. The number of cards distributed is equal to the local unit's membership total at the end of the preceding year.
- Should be distributed promptly to every individual who joins your PTA unit.
- Local units may obtain additional cards from the state office if dues have been paid for at least 90 percent of cards received to date. Cards are valid until the beginning of the new school year.
- Cards must be presented, with credentials, by members registering as voting delegates at state and national conventions, and at council and district meetings, as well as local unit meetings.

Membership Lists

The membership chair, in cooperation with the secretary and treasurer, is responsible for keeping an accurate list of the current PTA members.

Membership Awards

Georgia PTA recognizes membership achievements of local units with various awards. Please refer to the Membership Section in the *Committees* section of this *Leadership Resource Guide*.

Membership Benefits

Reference: PTA Membership Quick-Reference Guide (Included in Back to School Kit)

National PTA, Georgia PTA, councils and local units offer a variety of "Member Benefits" to PTA members from businesses and organizations. Many of these benefits are seasonal or event related, while others last for an entire membership year. It is important that all members are familiar with and able to take advantage of these "Member Benefits." Members should keep their PTA membership card with them at all times to take advantage of all benefits.

Member benefits are constantly changing. For a complete list of member benefit providers with details of the benefits visit Georgia PTA's website at www.georgiapta.org and click on "Benefits of Membership."

On Your Behalf, Georgia PTA

- Maintains and staffs the state office at 114 Baker St. NE Atlanta, GA 30308.
- Makes possible the Georgia PTA annual Convention Leadership Training Conference (CLT) to provide leadership training information, workshops and input into policy-making by the membership.
- Provides leadership training through PTA Universities, district conferences, online trainings, in person training from Board of Directors, workshops and printed resources.
- Defrays expenses of the State President and Board of Directors (all volunteers) when representing Georgia PTA at various meetings on the state and national level.
- Distributes state and national PTA publications and program materials.
- Maintains a nonprofit status with the IRS for its participating units.
- Finances special activities and projects for the welfare of children and youth.
- Provides the Reflections Program to encourage participation in the arts by children and youth. Georgia PTA's Reflections Program includes a special division for entries from students with special needs. These entries are judged and awarded separately at the state level.
- Represents local units at the state legislature, state board of education and other education and child-focused organizations. The Legislative Chairperson keeps the legislature informed of PTA positions on issues relating to children and youth, and keeps the membership apprised of proposed legislative issues that affect children and youth.
- Seeks and secures funding and awards for grants and scholarships.
- Maintains a website with all support services and Capitol Watch, an advocacy tool..
- Provides a toll-free number for constituent units and members.
- Publishes leadership training materials. Publishes an electronic newsletter.
- Facilitates the incorporation process for units and provides information on cost effective insurance protection for PTA volunteers and units.
- Negotiates member benefits for all PTA members.

On Your Behalf, National PTA

- Maintains a website with a wealth of information on PTA programs, advocacy efforts, press releases, social media, training resources, upcoming conferences and events and much more.
- Produces the Back to School Kit (<http://www.ptakit.org>) which contains the following references:
- *PTA President's Quick-Reference Guide* - created to support effective leaders.
- *PTA Finance Quick-Reference Guide* - created to support treasurer duties.
- *PTA Membership Quick-Reference Guide* - created to help increase and sustain membership
- *PTA Programs Quick-Reference Guide* - created to help implement and manage PTA programs.

- Maintains and staffs the National PTA office in Alexandria, VA.
- Organizes the National PTA convention which provides information, training, and policy-making for state and local PTA leaders.
- Offers the Reflections Program, an arts recognition and achievement program. The program celebrates all children's gifts and talents, and gives children who never have tried creating a work of art a chance to experiment and increase their self-esteem.
- Produces *Our Children* magazine, the national publication which is viewed digitally at www.pta.org.
- Pays expenses for the officers and other members of the National PTA Board of Directors (who donate their time and services) and for the National PTA Field Service staff for leadership training and consultant services to the various states.
- Provides a National PTA representative at each state convention and fulfills field service as requested.
- Channels information and resource materials to state PTAs, helping them carry on effective PTA programs in every community. Secures non-dues revenues to support programing for states and units.
- Organizes the National PTA Legislative Conference which is held annually in Washington D.C. Provides national representation on Capitol Hill, U.S. presidential appointed committees and before other education, health and child advocacy organizations.
- Represents local units in the legislative process, provides resource material for legislative chairpersons, and seeks to influence legislation affecting children and youth.
- Maintains the website, including E-learning courses, reproducible brochures, *PTA Takes Action* alerts on numerous topics as well as Local Leader News e-newsletters.
- Negotiates member benefits for all PTA members.

PTA Identity Campaign

Consistency Is Key

PTA has established guidelines for the proper use of the PTA name, logos, and tagline. The following guidelines are provided to establish a uniform, effective system for PTAs to use in order to maintain a consistent, visual style and brand identity for all PTA-produced materials.

- **Your PTA name is important.** Always publish, print, or speak the name of your PTA in a consistent manner – be consistent in the typeface or font you use, how your logo appears, and the color(s) you use. You need to be consistent in order to build an identity for your PTA.
- **As a licensee of the National PTA, you are entitled to use the PTA or PTSA name.** The name “PTA” and “PTSA” are registered service marks of the National Congress of Parents and Teachers. A service mark has the same legal status as a trademark. The distinction is that a service mark is used for services and trademarks are used for commercial products. The symbol ® designates that the PTA name has been registered with the federal government and may not be used by organizations not affiliated with the National Congress of Parents and Teachers. (PTA®, PTSA®)
- **Correct Forms of Abbreviation and Punctuation**
 - PTA, PTSA (no periods)
 - PTAs, PTSAs (plural, no apostrophe)
 - PTA's, PTSA's (singular possessive, use an apostrophe)
 - PTAs', PTSAs' (plural possessive, apostrophe follows the “s”)
- **Correct Use of the PTA Logo**
 1. The PTA logo should appear the same at all times on all correspondence, whether it is a memo, press release, newsletter, poster or brochure.
 2. Always reproduce the logo with its registered trademark symbol.
 3. The name of your PTA, called your signature, should always be set in Arial Black/Helvetica Black type and may be centered or stacked above the logo.
 4. The name of the PTA should be in a font size that is approximately one-third smaller than the size of the PTA logo used.
 5. **There are no periods in PTA or PTSA.**
 6. Do not repeat “PTA” in your name above the PTA logo; your name and logo should read as one, cohesive name.
 7. Do not alter the spacing between the letters.
 8. Do not cut the letters apart and stack them vertically. This makes the PTA logo difficult to read and hard to recognize.
 9. Do not make a pattern by repeating the logo or use as a decorative element.
 10. Do not print the logo in any other color than black, blue or white.

Signature (the name of your PTA) →

Logo →

Tagline →

Georgia
PTA®

everychild.one voice.

Using the Official PTA Color

The PTA logo should always be shown in the same color. The official PTA color is a dark, slate blue. For professional printing purposes, the ink color is Pantone Matching System® color 541.

The PTA name, logo and tagline should always appear together in the same color – either all in black, blue, or white. Never print your PTA name in a different color when shown directly above the logo or tagline.

Using the Tagline

The tagline “*everychild. onevoice.*” always appears in lowercase text and below the PTA symbol. Together, the logo and tagline form a standard, positive image and brand identity system for all PTAs.

If you need to type the tagline to show it in copy and not with the logo, it can be set as follows:

- Use **Times Roman** or **Times New Roman** typeface and all lowercase letters.

every *typed in italic, followed by no space*

child. **typed in bold with a period, followed by one space**

one *typed in italic, followed by no space*

voice. **typed in bold with a period**

- Do not alter the spacing between words or capitalize the words in the tagline.
- Do not alter the size or relationship of the tagline to the PTA logo.
- Do not set the tagline above the logo.

Any local parent-teacher association that does not pay state and national dues may not legally use the name PTA or PTSA and is not entitled to use materials or bylaws published by either state or National PTA. Unless otherwise noted, PTAs may reproduce and distribute materials from National and Georgia PTA as part of conducting their PTA work without written express permission. National and Georgia PTA materials may not be duplicated by any other organization or person without written permission.

PTA House Ads

PTA has provided house ads published in *Our Children* magazine as downloadable PDFs for use in your publications.

PTA Seal

From 1920 until 2001, the oak tree served as the emblem of the PTA. It currently serves as the official seal of the PTA; however, it is no longer widely used and is reserved for historical references and purposes.



Beginning with the trunk of the tree, the PTA symbolically branches out into the community. National PTA is represented by the trunk, which supports the main branches, or the states. The smaller branches represent districts and councils. The twigs are the local associations, which provide a connection to the leaves of the tree, its many millions of members.

BASIC PTA MANAGEMENT

LEADERSHIP DEVELOPMENT AND TRAINING

Access to high-quality, convenient and affordable training is one of the most valuable benefits of your PTA membership, both as a local unit and as an individual. Opportunities offered by national, state, district, and council are open to every PTA member and leader, and are not limited to officers or board members. Send representatives from your PTA to these opportunities. Don't reinvent the wheel and shortchange your members and students by trying to do things on your own. Don't rely on the "we've always done it this way" because it is possible that way has changed!

Allocate adequate funds in your unit's budget to enable multiple representatives from your unit to participate in training opportunities. Training is a legitimate, appropriate PTA expense. Consider it a mandatory item in your budget. Encourage members of your PTA every year to take advantage of these opportunities.

- **Advocacy Conference** – Learn to be a more effective advocate for children at this training while participating in establishing the Georgia PTA legislative platform. Held in the fall (September/October) each year.
- **PTA Day at the Capitol** – Held annually during the state legislative session, this event provides PTA leaders, members and supporters an opportunity to become more familiar with the legislative process, "hot" pieces of legislation and to speak with elected officials about education and children's issues. Develop and put your advocacy skills to work under the Gold Dome and over lunch with your state legislators. Bring fellow PTA members – all wearing red – and let your voice for children be seen and heard.
- **Youth PTA/PTSA Advocacy Day** – This annual event is designed to educate Georgia's youth on the legislative process as well as leadership and communication skills. Typically held during the legislative session.
- **State Convention Leadership Training (CLT)** – Georgia PTA strongly encourages members to attend CLT. Delegates participate in workshops and general sessions, vote on officers for the state PTA (biannually), receive leadership resources, membership cards and other valuable resources, plus have the opportunity to visit an extensive exhibitor hall, and network and celebrate the accomplishments of PTAs from around Georgia. **We strongly encourage each unit and council to send delegates every year.**
- **PTA Universities** – Series of training seminars on various timely subjects, from financial management to Reflections to best practices for effective family engagement, are held at the state PTA office and other locations around the state. Check the Georgia PTA website for dates and registration information.
- **District Conferences and Special Events** – In the fall and spring, each district hosts a conference for units and councils in the district to provide additional training, celebrate accomplishments and conduct the business of the district. Every unit should send at least one representative and is welcome to send any interested members.
- **Council Offerings** – Training offerings vary from council to council. These are the closest PTA training to your home and school and are a great way to network with neighboring PTAs.
- **Field Service** – At times your unit may need help or additional training, so ask for it! Contact your district director or council president to discuss bringing a field service representative or team to you. If your unit is planning a special occasion or meeting and wants to request a state board member to attend, please complete the State Board Member Field Service Request Form in the *Duties of Officers* section of this resource at least 2-4 weeks in advance and fax it to the state office.
- **National PTA Convention** – Held annually in June in different parts of the country. Workshops, nationally known speakers, an extensive exhibit hall, pin trading, delegates from every level of PTA and every state come together to conduct the business of PTA, celebrate and network. As with all PTA training, attending conventions is an appropriate PTA expense.
- **National PTA Legislative Conference** – This event affords PTA leaders an opportunity to sharpen and utilize their advocacy skills at the federal level. Learn and network with PTA members and leaders from

across the country as you prepare to meet with Georgia’s federal legislators on Capitol Hill for “Hill Visits.”

- **E-learning Courses** – Grow in your personal leadership skills from the comfort of your home. Day or night, log onto the National PTA website and participate in an E-learning course about team building, conflict management, grant writing, planning and goal setting, and more. Earn a certificate for completing a course online and credit toward your Keys to Leadership. Georgia PTA also offers on demand video training accessible through the website which can be counted towards completion of the Keys to Leadership program. The Presidents and Treasurers workshops are also available in Spanish.

KEYS TO LEADERSHIP

Georgia PTA’s Keys to Leadership recognizes PTA members for their commitment to developing their leadership skills. By stimulating personal and professional growth, the Keys to Leadership seeks to help leaders master skills and lead others to achieve goals. It provides leaders at the local unit, council and state levels an opportunity to reach their full potential.

See the Keys to Leadership page in Section 7 of this Leadership Resource Guide for more information.

PROCEDURE BOOK

A procedure book is one of the most important and basic tools in PTA work. It identifies the work and continuity of an office or chairpersonship and charts a course of action to be followed, association background, contributions from others, successes and failures. An up-to-date record gives a foundation on which to build. The book is compiled by each officer and committee chair for his/her own use during the terms and passed on to the incoming successors.

Procedure books should contain records of events, programs, and projects, and include details of arrangements, evaluations of results, and lists of available resources. They are an excellent way for each incoming officer and committee chair to build upon the successes of his or her predecessor.

A procedure book can be a notebook, a loose-leaf binder, an expandable file, thumb drive, CD, or electronic documents stored in the cloud. Remember that a procedure book is the property of the association and should be given to your successor or the incoming president.

What do you put in it?

- **Contact information** for Executive Committee, Board of Directors, school personnel
- **Contact information** for council and district
- **Plan of Work, PTA calendar, school calendar, school system calendar (including testing), bylaws, current budget, newsletters and bulletins**
- Pertinent **correspondence** pertaining to your office or chairpersonship
- Copy of any **reports** sent to council, district, state office or National PTA
- Copy of unit’s **budget** and treasurer’s reports
- **Notes** from workshops, conferences and conventions you have attended
- **Materials** received from council, district, Georgia PTA or National PTA
- Any other **resource material** you have found to be helpful
- **Evaluation** of the year's work with specific suggestions for improvements

Note: For specific information about the president’s procedure book, see p. 50.

If you did not receive a procedure book, file, electronic folder, etc. - NOW is the time to start one for yourself and for your successor.

PARLIAMENTARY LAW

Reference: *National PTA Back to School Kit: PTA President's Quick-Reference Guide*

Parliamentary law is a consistent set of rules that governs deliberative assemblies. The rules protect the rights of the individual, the minority, the majority, the absentee and the association; provide for consideration of one subject at a time; and require courtesy to all while showing partiality to none. Members should understand the fundamentals of correct procedure in order to take an active part in the business meetings. Parliamentary law is designed to maintain order, ensure justice and equality and to expedite business and is effective for conducting PTA business at all levels of meetings.

The objectives of parliamentary procedure are to 1) help the president conduct meetings and 2) assure that business will be transacted in a fair and democratic manner according to the bylaws of the association. The president (the chair), as the elected leader, is to 1) carry out the will of the assembly, not to bend the will of the assembly to his or her own; and 2) respect the opinion of the minority. Remember, authority is vested in the office, not in the person.

Basic guidelines include:

- All members are equal.
- An established number of voting members must be present to conduct business (quorum).
- Only one main motion may be before the assembly at a time, and only one member may have the floor at any one time.
- The maker of a motion may vote against it, but is not permitted to speak against it.
- Nominations do not require a second; a motion to accept the report of the Nominating Committee is out of order.
- A majority vote decides, except where rights of members are involved.
- A two-thirds vote is necessary when a motion limits or interferes with the privileges of a member or of the assembly bylaws, cutting off debate, closing nominations, rescinding action without notice, etc.
- General consent is a silent method of voting; silence is agreement with the decision of the majority.

Parliamentarian's Role

The parliamentarian is a consultant, commonly a professional, who advises the president and other officers, committees, and members on matters of parliamentary procedure. The parliamentarian's role during a meeting is purely an advisory and consultative one. The parliamentarian must remain impartial, and therefore does not make motions, participate in debate, or vote on any question except in the case of a ballot vote.

The Parliamentarian should:

1. Be knowledgeable about the association and rules of order.
2. Sit near the presiding officer for convenient consultation. The presiding officer may call on the parliamentarian at any time for advice.
3. Not speak unless given permission by the presiding officer. A member of an assembly who acts as its parliamentarian has the same duty as the presiding officer to maintain a position of impartiality, and therefore does not make motions, participate in debate, or vote on any question except in the case of a ballot vote. The parliamentarian is not an officer of the association but is a member of the Executive Committee.
4. Obtain a copy of the most recent edition of *Robert's Rules of Order, Newly Revised* to study and keep at hand at meetings for ready reference.
5. Study the bylaws of the association or council. Have a copy on hand at all meetings.
6. Read about parliamentary procedure in the *National PTA President's Quick Reference Guide*.
7. Cooperate with the secretary in seeing that everything is recorded in the minutes that pertain to actions taken by the association.

Motions

Reference: *Robert Rules of Order Newly Revised* and <http://robertsrules.com/>

Although it is not absolutely necessary to know all of the rules, basic knowledge and a copy of your governing authority (bylaws) will serve presiding officers well. Business is introduced in a meeting by means of a motion. A main motion is one that brings a subject before the association for its consideration and action. The first step before a member can make a motion is to “obtain the floor,” by addressing the presiding officer and then waiting to be recognized by the chairperson as the member who has the exclusive right to be heard at that time.

Basic Parliamentary Points to Remember:

- Motions must be expressed in a clear, concise affirmative statement, containing only one main idea. Only one main motion may be on the floor at any one time.
- The correct language is as follows: “I move that...” or “I move to...” ; not “I make the motion that...” The maker of a motion should be allowed, if he wishes, to begin discussion.
- A motion that does not come from a committee must be seconded.
- There should be no discussion until the motion has been stated by the chair, and he or she calls for it.
- No one should be allowed to speak twice while another person wants the floor.
- A nomination is not a motion, and therefore, need not be seconded. A report of the Nominating Committee should not be accepted as a motion of the Nominating Committee chairperson or anyone else. It must be presented to the presiding officer who will reread the slate and solicit nominations from the floor for each office. (A copy of the report should be filed with the secretary.)
- The president may vote on a pending question when the vote would change the outcome; that is, only to make or break a tie. The president may vote when the voting is by ballot. In all cases, the president may vote only once.

To obtain action of the assembly on a main motion, the following steps are necessary:

Obtaining the floor: Member rises and addresses the chair, “Mr. (or Madam) President,” and awaits recognition by chair.

Assigning the floor: The chair recognizes the member and assigns the member the floor by speaking the member's name or nodding to the member.

Making the motion: Member introduces the motion by stating, “I move that...”

Seconding the motion: Another member seconds the motion by saying, “I second the motion.” (Seconding merely means that the seconder agrees the motion should come before the assembly, not that the seconder necessarily favors the motion.)

Stating the motion: The chair states the question on the motion saying, “It has been moved and seconded that...”

Member's debate: The chair calls for remarks by asking, “Is there any discussion?” and recognizes maker of motion as first speaker or “Are you ready for the question?”

Putting the question: Taking the vote. When debate seems to have ceased, the chair says, “The question is on the adoption of the motion. All those in favor say ‘aye.’ (Pause for vote.) Those opposed say ‘no.’”

Announcing the results: The chair states the results of the vote saying, “The ayes have it, and the motion is adopted and (indicate the effect of the vote)” or “The nos have it and the motion has failed.” Action is not complete until the chair has stated the result of the vote.

Amendments to Motions

After the chair has stated a question and before the vote is taken, it may be desirable to change the motion in some way. This is known as amending the motion.

FAQs: Parliamentary Procedure

If the president really wants the PTA to approve something, can he or she speak on its behalf?

Yes, but the president must step down from presiding at a general meeting and let the vice president conduct the meeting until the matter is resolved. At a more informal meeting, such as the board of directors, the president should wait until everyone else has given his or her opinion and then s/he may give his or her opinion.

Can the president (presiding officer) vote?

The president (presiding officer) may vote on a pending question when the vote would change the results; that is, to make or break a tie. The president may vote in all cases where the voting is by ballot, but may vote only once.

How and when do we use ballot voting?

A ballot is usually a slip of paper on which a choice is written. It should be prepared in advance and handed out at the appropriate time. A ballot vote can be specified in the bylaws or it can be used when it is felt that a secret vote will give a truer indication of the assembly's will.

Can the parliamentarian vote?

A member of an assembly who acts as its parliamentarian has the same duty as the presiding officer to maintain a position of impartiality, and therefore does not make motions, participate in debate, or vote on any question except in the case of a ballot vote.

BYLAWS

Reference: National PTA Back to School Kit: PTA President's Quick-Reference Guide

- Fundamental governing rules of a PTA.
- Contain basic rules relating to the association as an organization in order to conduct the unit's business and govern its affairs.
- Define the primary characteristics of the association, prescribe how the association functions, and include all rules that the association considers important to the rights and responsibilities of the membership, whether present or absent from the assembly.
- Are always the ranking governance document and supersede the procedures and parliamentary authority of the entity. One always looks first in local unit and council PTA bylaws for a ruling on any question, then to procedures, and finally to the most recent edition of *Robert's Rules of Order Newly Revised*.
- To amend the bylaws see the Bylaws Committee section of this *Leadership Resource Guide*.

Quorum

- The quorum for your unit is set by your bylaws and is the minimum number of members who must be present to conduct business at a general membership meeting. Georgia PTA recommends a minimum of fifteen (15) members to constitute a quorum at a general membership meeting. When a quorum calls for a "majority" (most typically for the Executive Committee and Board of Directors), that means "more than half." For example, if the Executive Committee is comprised of 7 persons, a majority (more than 3 1/2) is 4. Likewise, if the Board of Directors is comprised of 12 persons, a majority is 7.
- If a quorum is not met at a meeting, then a vote cannot be taken. The quorum must be established before business can be conducted in the general assembly. The minutes should reflect the fact that a quorum was present.
- For more detailed information concerning parliamentary procedure, contact the Georgia PTA office, Georgia PTA Parliamentarian or the Georgia PTA Bylaws Committee Chairperson.

ALLEGATIONS AND DISCIPLINARY PROCEDURES

Georgia PTA has established policies and procedures to be followed by all its members and PTA constituents when allegations of a violation of PTA bylaws, policies, procedures or conduct that is injurious to the association is made against any member, group of members, unit, council, district or state.

This section of Georgia PTA Policies and Procedures shall be shared with all constituents (local units, councils, districts) and members to:

- a. Protect every members' right to due process
- b. Make decisions in the best interest of the association to obtain a satisfactory resolution quietly and informally, when possible and formally, when necessary.

Types of Resolution

- a. **Informal Resolution** – Documentation, investigation, discussions and conflict resolution used when a verbal or written inquiry is made. The result of an informal resolution is a verbal or written warning.
- b. **Formal Resolution** – Documentation, investigation, discussions, conflict resolution, and hearings used when a verbal or written inquiry is made and some form of discipline action is adopted.

The authority by which Georgia PTA may take disciplinary action is found in the following sources:

Bylaws of Georgia PTA:

ARTICLE IV – Constituent Associations

ARTICLE VI – Local PTAs/PTSAs

ARTICLE XIII– Districts

ARTICLE XIV – Councils

ARTICLE XV – State & Local Relationships

Robert's Rules of Order, Newly Revised

This policy is applicable to all members of local units, councils, districts and state. Each PTA/PTSA is organized and chartered in conformity with the rules and regulations as prescribed in the Bylaws of Georgia PTA under the authority of the National PTA. In addition, each PTA/PTSA is organized as a subordinate of Georgia PTA under the Corporations Code of the State of Georgia and issued a Federal Employer Identification Number and tax-exempt status under Internal Revenue Code 501(c)(3) by exempt letter dated September 19, 1963, to Georgia PTA and using the Group Exemption Number.

Who May Make Allegations

Any member or group of members may make allegations in writing, against an individual member, group of members, local units, council, district or state. Allegations must be fact based and supported with documentation and/or corroborating witnesses. It shall contain:

- a. A listing of specific bylaws, policy and/or procedure violations
- b. Dates, times and places of misconduct or inappropriate behavior
- c. Copies of minutes, if applicable
- d. Names and contact information of witnesses
- e. **Additional Collaboration** - Upon notification of the allegation(s) against a local unit, council, district or state, a collaborating written and signed statement should be obtained from:
 1. Three (3) members of the executive committee or three (3) members in combination of executive committee and board of directors and
 2. Three (3) members of the association or school administration.

Members found making false allegations may be subject to disciplinary action.

Who has the Authority to Discipline**ARTICLE XV: STATE AND LOCAL RELATIONSHIPS**

- a. The executive committee shall review any alleged violations by local PTAs/PTSAs or councils of the National PTA Bylaws, of these bylaws, or their own bylaws or other practices or activities of local PTAs/PTSAs and councils that may tend to affect the Purposes and Basic Policies of the Georgia PTA or the National PTA. The executive committee shall report its recommendations to the board of directors;
- b. The board of directors shall give due consideration to the report of the executive committee and shall afford the local PTA/PTSA or council an opportunity to be heard and to respond. If, upon such consideration, the board of directors finds a violation by the local PTA/PTSA or council, it shall by two-thirds (2/3) vote, require the local PTA/PTSA or council to take appropriate action within a time stipulated by the board of directors. If the local PTA/PTSA or council fails to comply with the recommended actions, the board of directors may withdraw its status as a unit of the Georgia PTA and the National PTA; and
- c. This authority is applicable to all constituent PTAs. The local unit, council, district and state executive committee shall have authority to review allegations and render decisions.

The chain of command shall be used unless there is a conflict of interest.**Member Allegations:**

- a. The executive committee of a local unit handles allegations against a local unit member. If not resolved, the matter is then forwarded to the local unit board of directors; followed by the council; district; then state board of directors until said matter is resolved.
- b. The executive committee of the council handles allegations against a council board member, followed by the district, then state board of directors until said matter is resolved; and
- c. The executive committee of the district handles allegations against a district member. If not resolved, the matter is then forwarded to the district board of directors, followed by the state board of directors until said matter is resolved.
- d. The executive committee of the state handles allegations against a state board member, and apprises the board of directors of the resolve. If not resolved, the matter is then forwarded to the board of directors until the matter is resolved.

Executive Committee and Board of Directors Allegations:

- a. The executive Committee of the council handles allegations against the local unit executive committee or board of directors. If not resolved, then the matter is forwarded to the district, followed by the state board of directors until said matter is resolved;
- b. The executive committee of the district handles allegations against the council executive committee or board of directors. If not resolved, then the matter is forwarded to the state board of directors until the matter is resolved;
- c. The executive committee of the state handles allegations against the district executive committee or board of directors; and
- d. The executive committee of the state or a third party mediator handles allegations against the state executive committee or board of directors.
- e. Any allegations forwarded by any state PTA member or constituency to National PTA will be reviewed and referred back to the respective state PTA.

When is Discipline Considered

Individual Member or Group of Members

It is understood that all PTA members are required to be of honorable character and reputation and support the mission, vision and values of the PTA. Discipline is needed when a member:

- a. Violates the bylaws, governing policies and procedures, the articles of incorporation, or the code for non-profits as defined by the Georgia State code for nonprofits and the IRS statute for nonprofits;
- b. Steals, **mishandles or misappropriates** funds or assets from the PTA;
- c. Causes harm to the health, safety, welfare or education of a child or other members;
- d. Violates the oath, trust and ethics of the office/position while serving as a member of the board of directors; and
- e. Uses PTA resources for purposes other than prescribed or for personal gain.

Local Unit, Council, District, or State

All levels of PTA are required to remain in good standing as defined in their respective bylaws or standing rules.

Following the chain of responsibility, whether an allegation is made or not, intervention or discipline may occur if one or more of the following indicators are present:

- a. Not operating within Georgia State PTA or National PTA policies, procedures and/or bylaws or standing rules;
- b. Not complying with bylaws or standing rules, whether unknowingly or willfully;
- c. Continued re-circulation of same people in officer positions, which discourages new leadership from coming forward;
- d. Not remaining in good standing; and ineffective leadership. Examples could include:
 1. No scheduled meetings; general, executive committee or board of directors;
 2. No approved budget;
 3. No audit report;
 4. No treasurer's reports at executive committee, board of directors and/or general meetings; and
 5. No minutes recorded or filed.

Within A Committee

- a. At every level of the association, there are committees that carry on the work of the association. The executive committee is the only committee with elected officers. The executive committee appoints the chair of all committees (except the nominating committee and audit committee). Discipline within a committee is permitted. One or more members of the committee may make an allegation against a committee member.
- b. The allegation shall be submitted to the Chair of the committee:
- c. To determine if the allegation is related to the duties and responsibilities of the committee. To handle in an informal way, if possible and formally, if necessary.
- d. The committee member has the right:
 1. For allegations against his/her good name not be made except by charges brought on reasonable grounds
 2. To due process, to be informed of the charge, and given time to prepare to defend against the allegation
 3. To be fairly treated
- e. In reference to disciplinary action and for the sake of discretion, discussions and decisions made within a committee shall remain within the committee.
- f. A breach of confidentiality by any committee member shall result in disciplinary action.
- g. Due process will proceed whether or not a member resigns. It will be recorded in a confidential board report if there is a substantiated allegation or disciplinary action, i.e., censure, probation, expulsion that will be maintained by the secretary, and a copy forwarded to the state office. This information shall be made available for the nominating committee.

NOTE: In all cases, start a file by completing an Allegation Form (See Appendix C) to document the steps toward resolution. It is important to keep a log of the dates and details that created the actions and steps taken to resolve the issue.

Allegation Procedures

Efforts to resolve allegations against a member, group of members, local unit, council, district or state must first be investigated. Once documentation or other evidence has been gathered, a meeting should be scheduled with those directly involved within thirty (30) days of the allegation, using the following Procedures:

Investigating

- a. Upon notification of an allegation, against a member, group of members, local unit, council, district or state, the President or their assigned delegate shall:
 1. Request a written statement of allegation, using the Allegation Form, with supporting detailed documentation related to alleged violations of Bylaws and/or policies/procedures or any evidence that supports the allegation.
 2. Maintain a documentation file to include the written statement of the allegation and any supporting documentation, telephone log, correspondence, emails, etc; and
 3. Take care at all times to maintain **confidentiality** and to avoid potentially slanderous statements. Information must be kept with those persons directly involved and they must refrain from making comments or accusations to others;
- b. Take steps to determine the legitimacy of the allegation.
 - a. Review the bylaws and policies/procedures in relation to the allegation.
 - b. Talk to individuals to verify or gather additional information regarding the allegation. Care must be taken to not make any implicit, explicit, written or oral statements or accusations; and
 - c. Consult with the appropriate members in the chain of command, any state or national PTA board of directors and/or parliamentarian.
- c. Write a report, for the executive committee and request a formal investigation if it appears that the allegation is valid; and
- d. Provide copies of all documentation and reports for the files kept at the state office, when removal from office is recommended.

Handling the Allegation

The individual or group responsible for handling the allegation must be fair and impartial. If a conflict of interest exists, the individual or group must allow the next individual or group in the chain of responsibility to handle the allegation.

- a. The member or group handling the resolution shall review the Allegation Form and all attached documentation and communication;
- b. Whatever action is recommended, a copy of the Allegation Form, Allegation Checklist and Resolution Form shall be copied to the next level on the chain of responsibility;
- c. Allegations should be handled based on what the complaint is and whom it is against;
- d. Make sure the member who the allegation is against has been informed of the allegation;
- e. Arrange a meeting date, time and place and contact those directly involved. Attendees could also include the president and principal of the involved PTA, when applicable;
- f. At the meeting:
 1. Establish ground rules;
 2. Remain calm and neutral;
 3. Be proper and tactful so all parties and all points are presented;
 4. Allow each side to present their side and recommendations for solution;
- g. This first effort at resolution should start by referring to the Bylaws, policies and procedures, and possibly the minutes of the association. The facilitator should attempt to resolve the matter through mediation at the meeting. (See “CONFLICT MANAGEMENT: The Mediation Process” in this section.) It may be necessary to schedule an additional meeting time in order for the facilitator to research and/or

- consult for clarification of the matter;
- h. The outcome of such meetings may be:
 1. Allegation is unfounded and dismissed; or
 2. Allegation is founded and one or more forms of discipline recommended (warning, apology, censure, probation, removal from office, withdrawal of a charter)

Methods of Discipline

Disciplinary action should only take place if the allegation has been proven and should fit the charge. There are various recommendations for disciplinary action applicable to a member, group of members, local unit, council, district and state.

Warning – a verbal or written warning is issued.

Apology – a private or public apology may be required.

Censure – a formal, strong reprimand usually issued in a written statement of disapproval.

Probation – a written agreement signed by all parties agreeing to specific duties, actions and/or behavior accepted over a specified period of time. Violation of the probation agreement shall be cause for further discipline

or immediate removal. All details must be stated in the agreement.

Removal From Office – the strongest and final form of discipline for officers and committee chairs.

- a. The bylaws of each local unit, council and state contain the authority to remove an officer or chairperson from his/her elected or appointed position.
- b. Failure to attend three (3) consecutive meetings without adequate excuse or notice;
 1. Not fulfilling the responsibilities of the office or position; and
 2. Engaging in conduct that is determined to be injurious to the association or its purposes.
 3. The authority to remove from office shall be utilized after the efforts to resolve the allegation have first been addressed through an informal resolution and secondly through the formal resolution, which must involve the Georgia PTA President or their designees; and
- c. If Removal from Office is deemed necessary, the Georgia PTA President shall be notified in order to comply with the bylaws referenced in:
 1. Local Unit – Local Unit Bylaws: Article IX
 2. Council – Council Bylaws: Article X
 3. District and State – Georgia PTA Bylaws: Article X

Withdrawal of Charter

Whether the matter relates to nonpayment of dues or a violation of Bylaws, policies or procedures, the PTA District Director is responsible for supervising the fulfillment of Article VI: Local PTAs/PTSAs section of Georgia PTA Bylaws. (See Section for more details) Georgia PTA has the responsibility to follow through and bring all matters to a resolution.

Conducting a Hearing

Georgia PTA Bylaws state it is necessary to have a hearing in order to remove a member from the Board of Directors. Hearings are done in executive session.

Who conducts a Hearing

1. Per the Georgia PTA bylaws, the state President shall appoint a member of the Georgia PTA Board of Directors to conduct a hearing.
2. They will formulate questions to be asked during the hearing.
3. The Georgia PTA President shall notify, by first class, registered mail or certified with return receipt requested, the person against whom the allegation has been made, specifying and listing the allegation. (See “Sample Letter for Notification of Hearing”)

Preparation for the Hearing

Prepare for the hearing by referring to the “Conducting a Hearing Checklist” and Allegation Form, both found in later in this section. Ensure all involved parties were notified. Ensure the member or group against whom the

allegation was made has a copy of any documents or materials that will be used during the hearing.

During the Hearing

At the hearing, the written allegation will be read aloud. The reading must be followed by discussion, questions and explanations. The member against whom the allegation was lodged should be present for both sides of the discussion. The committee must only discuss the written allegation. Use and distribute a copy of the *Conducting a Hearing Procedure Checklist*.

At the Conclusion of the Hearing

At the conclusion of the hearing, the committee goes into closed session to discuss the proceedings, prepare a list of findings based on the documentation presented and the oral discussion to decide what action to recommend to the appropriate Local Unit/Council Board of Directors and Georgia PTA. The recommendation requires a two-third (2/3) affirmative vote of the committee. Findings may include a recommendation that:

1. The individual be removed from membership;
2. The individual's membership be suspended or terminated;
3. The individual currently serving in any elected or appointed PTA position may be asked to resign that position.
4. The individual sign an agreement not to seek a PTA position where they would be responsible for handling PTA funds.

NOTE: If one of the involved parties is accompanied by legal representation consideration should be given to rescheduling the hearing at another time when all parties could have legal representation.

Probation

Local Unit, Council or District Probation

If the recommendation is to place the local unit, council or district on probation, the PTA District Director, appointed Hearing Facilitator or Grievance Committee chair must report the recommendation to the Georgia PTA President, who will then inform the Georgia PTA Executive Committee.

Copies of the Probation Letter shall be sent to the appropriate bodies:

- a. Local unit President and officers,
 - b. Principal,
 - c. Council President,
 - d. District Director, and
 - e. Other parties involved in investigative process.
1. The council Board of Directors, principals of local units within the council, and the superintendent with specific reasons for the decision and the length and terms of probation.
 2. The local units that comprise the council with general information concerning the probation and the authority on which the action is taken.

During the Probation Period

The council/district or state must monitor the unit, council or district during the specified probationary period.

Local Unit

A council, designated district representative or state board member must attend every Executive Committee, Board of Directors, and general association meeting of the local unit, council or district.

A meeting to review the Purposes of the PTA, basic policies and responsibilities must be scheduled by the PTA district for the school administrator(s) and the PTA Board of Directors.

The Georgia PTA Parliamentarian must review the unit's Bylaws and the unit must update Bylaws if necessary to the most current edition of the Bylaws for Local PTA/PTSA Units.

The unit plan of work, minutes and financial records (including the budget, audit and treasurer's reports) must be reviewed by a council/district, or appointed designee.

The unit officers must attend training sessions in the area of concern (leadership, financial, etc.) with the council

or district, and Georgia PTA.

The unit must be represented at all council or district meetings.

Council

The District Director shall review the council plan of work, minutes and financial records (including budget, audit and treasurer's reports).

The council officers must attend training sessions in the area of concern (leadership, financial, etc.) at the district or state level. The council must be represented at all meetings of the PTA district.

District

The President shall appoint a member of the Board of Directors to review the district plan of work, minutes and financial records (including budget, audit and treasurer's reports).

The district officers must attend training sessions in the area of concern (leadership, financial, etc.) at the district or state level. The district must be represented at all Georgia PTA board meetings.

Lifting of Probation

Local Unit - The PTA district is responsible for the probationary process. At the end of the probationary period, the Georgia PTA President and the PTA District Director will assess the completion of the terms of probation. If conditions of probation have been met, the unit will then be considered in good standing if other requirements for that status have been met. In the event the terms of probation have not been met, a referral must be made to the Georgia PTA Executive Committee.

Council - The PTA District Director is responsible for the probationary process. At the end of the probationary period, the Georgia PTA President, or their appointed designee, and the PTA District Director will assess the completion of the terms of probation. If conditions of probation have been met, the council will then be considered in good standing if other requirements for that status have been met. In the event the terms of probation have not been met, a referral must be made to the Georgia PTA Executive Committee.

District – The Georgia PTA Executive Committee is responsible for the probationary process. At the end of the probationary period, the Georgia PTA President, or their appointed designee, and the PTA District Director will assess the completion of the terms of probation. If conditions of probation have been met, the district will then be considered in good standing if other requirements for that status have been met. In the event the terms of probation have not been met, a referral must be made to the Georgia PTA Executive Committee.

Unit Charter and Council/District Recognition Withdrawal

Reasons for Action

- a. Lack of required officers (President, Vice President, Secretary, Treasurer) (Required by Local Unit Bylaws);
- b. Fewer than twenty (25) members (Bylaws);
- c. Nonpayment of dues (Bylaws state monthly); and
- d. Violations of Bylaws, policies and procedures (e.g., proper financial procedures).

Lack of Officers

1. All units are required to have a President, Vice President, Secretary, and a Treasurer according to the Bylaws for Local PTA/PTSA Units, Article VI: Section 1
2. When a local unit is in violation of this article, the PTA council president shall notify the unit of the violation and work with the officers and the Principal to correct the situation. *If there is no council, then the District Director shall notify the local unit of the violation.
3. Once notified by the Council President or District Director, the unit will have thirty days (30) to comply.
4. Failure to comply may result in a recommendation to Georgia PTA to withdraw the unit's charter.

Fewer Than Twenty-five (25) Members

A local unit in good standing is composed of not less than twenty-five (25) members according to the Georgia PTA Policies and Procedures.

Nonpayment of Dues

A unit which has not remitted state and National PTA dues for at least twenty-five (25) members by the last business day in February will be sent a delinquency notice from the Georgia PTA office. A list of the delinquent units within each PTA district is sent to the PTA District Director, the Georgia PTA treasurer, and the Principal.

- IT IS THE RESPONSIBILITY OF THE PTA DISTRICT OFFICERS TO NOTIFY THE COUNCIL AND INVESTIGATE THE REASON FOR FEWER THAN TWENTY-FIVE (25) MEMBERS, OR NONPAYMENT OF DUES, AND TO HELP REMEDY THE SITUATION.
- Georgia PTA office will prepare a list of all units, councils and PTA districts still delinquent on June 1. The Georgia PTA Board of Directors, by formal action at its first regular meeting, may withdraw the charters and terminate recognition of the units listed.

Withdrawal Steps**Local Unit**

The Council Board of Directors and authorized school district administrator must receive written notification. The date of the recognition withdrawal is to be entered into the minutes of the Council and PTA district.

Council

The District Board of Directors and authorized school administrators must receive written notification. The date of the recognition withdrawal is to be entered into the minutes of the PTA district and submitted to Georgia PTA.

Reorganizing a PTA Unit, Council, or District after Disciplinary Action

- a. A local unit, council, or district may be reorganized after Georgia PTA has withdrawn recognition due to violation(s) of Bylaws, policies or procedures using the following guidelines:
- b. The PTA must wait for a period of one (1) year from the date that the recognition was withdrawn before reorganizing;
- c. No officer who was serving on the Board at the time of the disciplinary action may serve as an officer of the reorganized PTA for the first year;
- d. The initial step in reorganization is to contact the PTA District Director and schedule an orientation on the policies and procedures that must be followed;
- e. After reorganizing as a PTA, all newly elected officers must attend PTA Board development and training provided by the PTA district or Georgia PTA within one month of the election meeting;
- f. A PTA District Director or designee will be assigned to mentor the reorganized PTA during its first year; and
- g. At the end of the first year, the PTA district will provide the Georgia PTA President with a report of the reorganized PTA. Items to include in the report may be:
 1. Financial overview of budget, fundraising and copies of audits.
 2. Plans of work, which includes programs and activities.
 3. Board working relationships.
 4. Problems and concerns.
 5. Bylaws updated to most current edition of Bylaws.
 6. Attendance at PTA district and council meetings and events.
 7. Participation in PTA training programs provided by the PTA district, council or provided by the PTA council, district, and Georgia PTA.

APPEAL PROCESS

A member, local unit, council or district may appeal the decision of an investigation and disciplinary action by notifying the Georgia PTA President in writing, no later than thirty (30) days of the mailing of the findings of the hearing.

The Georgia PTA President shall:

- a. Appoint a Grievance Committee to consist of no fewer than three (3) people.
- b. Set a date within thirty (30) days for the Grievance Committee to review the Allegation Form, verify if the allegations are legitimate violations or not and the resolution.

The Grievance Committee may determine:

- a. The allegation(s) are unfounded. A letter is sent to all parties involved stating the findings of the committee and the matter is closed.
- b. The allegation(s) were founded and the decision stands. A letter is sent to all parties and the matter is closed.
- c. The violations are found to be willful or ongoing or a solution is not possible and may request that Georgia PTA Executive Committee, with a recommendation to the Georgia PTA Board of Directors:
 1. The unit charter, (council/district recognition) be withdrawn
 2. Placed on Immediate probation status pending that vote.
 3. The PTA will be notified fifteen (15) days in advance of the date upon which the Georgia PTA Board of Directors is to take action. Copies of the notification will be sent to the appropriate PTA body.
- d. They require the assistance of the PTA council or district in conducting the investigation.
- e. The facilitator must prepare a written report for the Georgia PTA President, District Director, Council President and/or Local Unit President.
- f. If Probation is recommended for a local unit, council, or district, the procedures outlined in the Probation Section must be followed.
- g. As the chartering body, only the Georgia PTA Board of Directors has the authority to withdraw the charter or recognition of a local unit, council or district.
- h. A recommendation by the Grievance Committee to take such action must be presented at the next scheduled Georgia PTA Board of Directors meeting, or a called meeting, and requires a two-thirds (2/3) affirmative vote.
- i. After the vote by the Georgia PTA Board of Directors, the PTA district must record the actions of the Georgia PTA Board of Directors in the PTA district minutes. If the action concerns the status of a local unit, the PTA council must record the actions of the Georgia PTA Board of Directors in the council minutes.

CONFLICT MANAGEMENT: The Mediation Process

Conflict can occur whenever people interact. PTA recognizes conflict as an opportunity for:

- a. Personal growth
- b. Re-evaluation of goals
- c. Strengthening the association

It is the responsibility of the PTA leader to be familiar with the most positive way to deal with conflict. At times, it may be necessary for the PTA leader to act as a mediator in conflicts between individuals in the unit. Training in Parliamentary Procedures is very helpful and strongly encouraged.

In the role of the mediator, the PTA leader should refrain from attempting to solve the problem, but rather:

- Empower the individuals involved in the conflict to do so.
- Keep the discussion focused on the problem, not on the people.
- Always remain neutral.
- Serve as the facilitator for discussion.
- Encourage participants to use active listening skills.

ALLEGATION FORM

ALLEGATION/COMPLAINT PROCEDURES

Each person (herein referred to as complainant) that has a complaint of a Board of Directors or Committee Member shall complete an allegation form and submit such form to the President, District Director or Committee Chair.

Upon receipt of the fully executed allegation form the President, District Director or Committee Chair, shall notify the Executive Committee or committee members.

The complainant will receive notification that the allegation has been received and the next steps.

After a thorough investigation of the allegation/complaint the complainant shall be notified in writing within thirty (30) days of receipt of allegation.

The decision of the President/Executive Committee or committee shall be final and binding.

COMPLAINANT INFORMATION

Complainant Name: _____ Date: _____

Board Position: _____ Committee: _____

E-Mail Address: _____ Telephone Number: _____

PERSONAL INFORMATION

Person Name: _____

Board Position: _____ Committee, if applicable: _____

Have you advised this person of your allegation and/or complaint:

Explain the complaint in detail: (Use additional page if necessary)

PRESIDENT/COMMITTEE CHAIR USE ONLY

Date Received: _____ Investigated? _____

Decision? _____ Decision Date: _____

ALLEGATIONS CHECKLIST

Please use this checklist to ensure that you have everything needed to proceed with an allegation against a PTA board/committee member:

- Filled out a copy of the Allegation Form Date _____
- The criteria for the allegation was found in the GAPTA/Council/local unit Bylaws and District Standing Rules:
Article _____, Section _____, Line(s) _____ Unit name and number _____
- The person that the allegation has been lodged against has a copy of the Allegation Form
Yes _____ Date _____
- Copy of the Allegation Form and Minutes, if applicable; have been sent to the chain of responsibility (Local Unit, Council, District, Georgia PTA President)
Yes _____ Date _____
- Investigation was completed
Yes _____ Date _____
- Hearing held
Yes _____ Date _____
- Allegation was founded _____ unfounded _____ Date of decision _____
- Recommended form of discipline determined, if founded Yes _____
- Documentation and reports of findings were sent to the state office, if applicable Yes _____ Date _____
**Note - District and Council will maintain a file of all forms if there is no removal from office*

Conflict Management was needed

Yes _____ No _____ Date _____

If yes, Date completed _____

Signature of Complainant: _____

Signature of person allegation was lodged against: _____

SAMPLE LETTER FOR NOTIFICATION OF HEARING

Date

Dear PTA Board of Directors:

Officers – by name and title

Standing Committee Chairs – by name and title

Please accept this as official notification to inform you that on **(date and time)** at a special called meeting of the **(named)** PTA, the Executive Committee having reviewed both, a letter to request the removal of an officer **(name and title)** and a letter from the officer responding to the request for removal, voted (list results of vote) to proceed with a hearing.

The hearing is scheduled for **(date, time and location)**. The hearing shall be 60-90 minutes.

Attached are the following for your review in preparation of the hearing:

- Excerpts from the (named PTA) bylaws
- Hearing procedures from the Georgia Policies and Procedures (found in this section)
- Letter from members requesting the removal of an officer
- Written response from the officer addressing the removal letter
- Question and Answer Sheet

After reviewing the attached information, if you have any questions, please feel free to contact, (contact info for State Bylaws Chair and designated board member assigned to oversee the hearing).

Regards,

Georgia PTA
everychild.onevoice.

Attachments: See list above

cc: Georgia PTA President
Georgia PTA President Elect
District Director (if appropriate)
Council President (if appropriate)
Georgia PTA Parliamentarian

CONDUCTING A HEARING PROCEDURE CHECKLIST

1. The President or presiding officer shall call the hearing to order.
2. The President or presiding officer states the rules of conduct.

RULES OF CONDUCT

- The presiding chair must recognize anyone wishing to speak.
 - All speakers must address their remarks to the presiding chair.
 - All speakers must be courteous, avoid personalities, and stick to the issue at hand.
 - The hearing is an executive session and everyone in attendance is obligated to confidentiality.
3. The secretary will read the Request for Removal Letter for the minutes.
 4. The secretary will verify that a copy of the letter was given to the officer.
 5. The presiding chair will call the names of the PTA members in attendance.
 6. The presiding chair will then ask the officer if they plead guilty or not guilty.
 7. If a plea of guilty is entered, there need not be a hearing, and the hearing can proceed directly to the determination of the penalty is a 2/3 vote for removal from office.
 8. If the plea of not guilty is entered, the hearing proceeds.
 9. Those requesting the removal are given an opportunity to speak for fifteen (15) minutes not to exceed thirty (30) minutes (this is optional in lieu of the reading of the Request for Removal Letter.)
 10. The officer being charged is given an opportunity to speak for fifteen 15 minutes, not to exceed thirty (30) minutes.
 11. The presiding chair will then ask the officer to leave the room.
 12. Based upon information presented at the hearing, the board may by 2/3 votes, recommend removal from office.
 13. After the voting is completed, the officer is called back into the room and advised of the result.
 14. After the hearing of the board, any recommendation for removal from office must be submitted to the membership for action at the next general meeting in the case of a local unit or council. An officer may be removed by 2/3 vote of the membership present and voting, a quorum having been established.
 15. The officer in question may resign at any time during the hearing by signing a letter of resignation and submitting it before leaving the meeting. Therefore, no voting at the general membership meeting would be necessary.

RESOLUTION FORM

Complainant Name _____

Local Unit _____

Local Unit No. _____

Allegation Received on:

Date _____

Allegations Review and Investigated.

Date _____

Findings:

Unfounded _____ If unfounded, check and send report to all involved

Founded _____ If founded, check recommended actions below and send report to all involved

Recommended Actions:

____ Conflict Management

____ Finances Recouped

____ Ineligible to serve in PTA leadership position

____ Other

Copies sent to (If applicable):

____ Local Unit President

____ Council President

____ District Director

____ State President

*****Note:** Major Offences such as, child endangerment, theft and gross dereliction of responsibilities officers/duties will be made available to leadership at all levels' **nominating committee.**

Signatures of Committee Members

PROBATION LETTER

Date

President

School and Address

Dear PTA President:

You are hereby notified that, effective **(date)** **(named)** PTA/PTSA, has been placed on probation by Georgia PTA for a period of **(time)** However, the Georgia PTA may remove or extend the probation based on compliance with the terms below.

List terms of probation

Failure to comply with the terms of probation as outlined may result in the loss of your Charter and 501(c)(3) status.

Georgia PTA sincerely regrets having to take such drastic measures, however, circumstances dictate, for the sake of the children you are elected to serve, this action must be taken. We look forward to working closely with the leadership of your unit, together we know we can build a strong, effective team to lead and manage your unit - one that positively engages families and the entire school community with a focus of doing what is in the best interest of every child.

Please do not hesitate to contact me if you have any questions.

Regards,

President

Georgia PTA

everychild. onevoice.

Attachments: See list above

cc: Principal
Officers of Local unit
Deputy Superintendent (If applicable)
Georgia PTA Officers
District Director
Council President
Georgia PTA Parliamentarian

Q & A SHEET

RE: THE REMOVAL OF AN OFFICER AND THE HEARING PROCESS

- Is the vote required to remove 2/3 of total board members or 2/3 of those present? The bylaws do not specify those present - as it does in the next section for membership confirmation - so it would seem to be 2/3 of the total.

All business of a board of directors requires a quorum. A quorum for the board of directors is a majority. Once you have a quorum, the vote must be 2/3 of those present and voting.

- How do you decide on a time limit for presenting evidence?

The officer and the member making the request will be asked at the start of the meeting which time frame they prefer. Both parties will have equal time, whether they use it all is their choice. The amount of time they each use will depend on the amount of evidence and the number of witnesses they wish to present.

- Are there rules of evidence regarding documents or people called?

The rules are those stated under “Rules of Conduct”. The documents and witnesses presented must be able to provide a clear and concise summary of facts in the time allowed.

- What is the procedure if you want to refute a document or witness the other side has called, since you will not get that ahead of time to prepare for?

In this process, the member making the request presents all their evidence first and the officer is then given an opportunity to respond. The officer is always in the position of hearing and seeing everything in advance. When time permits and the 15 or 30 minutes has not been exceeded, rebuttals may be permitted.

- What happens if the member making the request is not able to get the 2/3 votes required?

Without the 2/3 vote, the board of directors may not recommend removal of the officer to the general membership and the officer remains in office.

SOCIAL MEDIA/ELECTRONIC MAIL PROTOCOL

Electronic Mail (email) and social networking such as Facebook, Twitter, Instagram, Pinterest, YouTube, blogs and other forms of social media are being used for PTA communication and PTA business. The National PTA Back to School Toolkit has guidelines about using the various social media platforms which can be accessed by all PTA members, and especially a Communications Chair: (<http://www.ptakit.org/Communications/Social-Media/Social-Media.aspx>)

These forms of communication are NOT private communications – unlike letters you receive by regular mail. Courts have determined that email users do not have the right to privacy where email messages are concerned.

PTA leaders and members using these forms of communication are asked to:

- Use the same professional standards one would use in writing a letter or speaking as a PTA representative.
- Use discretion when sharing personal information, emotions and beliefs.
- Separate your personal communications from those being used to conduct PTA business.
- Please remember these forms of communication may not be used for all PTA business.

National, State, Council and Local Unit bylaws prohibit proxy voting. Therefore, social media communication may be used for any PTA business **except voting on bylaws amendments, election of officers, election of the Nominating Committee, approving the budget, amending the budget, filling officer vacancies or removal from office and those noted below.**

Using Email

1. Only send messages that would be appropriate in a memo to all PTA members, including your administrators, or on the front page of a newspaper. Online traces exist which allow others to view your online activity. Most messages can be easily forwarded to people you did not intend to see the message – so be careful what you say and to whom you say it.
2. An email or any form of social media should not to be used to discuss the details of sensitive issues that relate to an individual's removal from office, hearings or investigations. To protect their confidentiality, information and correspondence regarding these matters must be sent in writing and signed by the author as outlined in the bylaws.
3. Use the proper chain of command when copying PTA members. Your emails should be directly related to your PTA position and responsibilities. You should copy the President and/or Vice President when appropriate on email messages. Obtain the approval of the PTA President, prior to sending an email, if the message is considered important and/or being sent to a large number of members and/or the general membership.
4. Using emails under a PTA heading to send jokes, stories, gossip, solicit PTA members for personal gain or anything not related to PTA business is inappropriate and prohibited.
5. Proofread your work. Many times the tone or phrasing of a message can be misinterpreted and used to your disadvantage. Re-check for spelling and grammatical errors.
6. Check your email messages daily or on a regular basis. Respond to emails as soon as possible but no later than two or three days. If you have not responded within a reasonable time frame, do not be offended if someone sends a second request.
7. Do not send PTA messages that are:
 - Flaming – messages that are highly emotional, angry, contains profanity or insulting.
 - SHOUTING – messages that contain all CAPITAL LETTERS. (To most people it is offensive; implies annoyance or anger). Use of red, capital letters implies rage.
 - Spamming – sending email indiscriminately; too many and you run the risk of having them deleted.

- Contain symbols – Most people don't use them because they create a familiarity or give the impression of a casual email. Use of initials (OMG, BTW) may not be understood and can be offensive.
8. Keep messages short when possible. For lengthy emails, use appropriate breaks so it is easy to read or send in an attached file. Run-on emails with no clear separation are difficult to read.
 9. If your Email requires an attachment, include a message in the body of the Email referencing the attachment.
 10. If sending to a large number of people, protect the email address list by sending the email to yourself and blind copy everyone else. This way the recipients do not see everyone else's email address and don't have to scroll through a list of names.
 11. If using blind carbon copying (BCC), a notation regarding who is receiving the email should be in the body. (e.g., "This email is being sent to the members of the ABC Elementary School PTA Executive Committee")
 12. **Notify the appropriate state, district, council and local unit members when you change your email address.**
 13. Be considerate of the person sending you an email. If they send you an email and it has not been copied to anyone else, your response should be sent to that person only. If they send you an email and have copied others, it's permissible to respond and copy the same names. It's suggested you get the sender's permission to forward an email s/he intended for your eyes only.
 14. Email is considered informal; don't overuse for official correspondence, to deliver bad news or to send repeated messages for the purpose of critiquing and complaining. These matters should be handled in person, by phone or in writing signed by the author.
 15. Use the "C's" – Check to make sure your email is **courteous; concise; clear; communicates** the message; has a **cooperative** tone, and has been **checked**. Once you send email, it cannot be undone.
 16. No one-word responses. (e.g., "Yikes" or "Wow" or "Great")
 17. Use Reply All when it pertains to a subject addressed to more than one person. People will begin to perceive your emails as junk if they are copied unnecessarily. Be considerate of others time by not using "Reply All" when the message only needs to go to the original sender; just use "Reply."
 18. RE: Be very specific when using. If it says "confidential", it stays between the sender and receiver.
 19. "!!!" means the message is very important. If it is time sensitive, you can also put that in the subject line.
 20. Use names, proper openings, closings and "PTA" in the subject heading of the subject line to assure receipt and importance.
 21. When possible, use the tagline *everychild. onevoice.*
 22. When your name appears in the:
 - TO: You are being addressed, please respond.
 - CC: FYI. You can respond, but only if it is of the utmost importance.
 - BCC: Used when you want to protect someone's e-mail address privacy.

PTA RELATIONSHIPS

PTA presents a presence not only in the school and home, but also throughout the community. Each facet: parent, teacher, student, principal, superintendent, school board, and the community as a whole, play a vital part in the health, education and welfare of our children. Cultivating positive relationships between all of these entities support the purposes and viability of every PTA. Together we are a powerful voice for children working together to accomplish our mission of making every child's potential a reality.

PARENTS AND TEACHERS

Family engagement is enhanced by positive parent/family-teacher relationships, and PTA is an effective means of bringing these parties together. Through PTAs, parents and teachers work together to achieve the PTA Purposes. Teacher knowledge and leadership help the PTA serve children well. In turn, parental support enables teachers to optimize their important work of educating children and youth. Inviting parents and teachers to come together optimizes the success of both and energizes the school family.

STUDENTS

Students want to be part of an association that fights for causes they support and issues that affect their lives. Students, like all PTA volunteers, want to feel like their work and opinions are valued. The most important step a PTA can make when recruiting students is to ensure that they have a voice and responsibility. Find out what students are interested in and assign them to a committee. Students are in the classroom every day; they know what is happening and what is needed.

At the middle school and high school levels, students are encouraged to participate in Parent-Teacher-Student Associations (PTSAs). Students participate as full voting members of PTSA and should be treated with respect. Students are valuable members of committees in middle and high schools and bring their unique perspective to planning and participation.

Encourage student participation and volunteering by holding meetings after school or at lunchtime, assigning a student column each month in the PTA/PTSA newsletter, seeking their input on workshops and/or programs that would meet their needs and concerns, utilize student voices on panels for education enrichment on critical issues, have them help plan and implement middle and high school orientations, encourage student representatives to attend school board meetings for their PTSA.

PRINCIPALS

The local unit principal invites PTA into the school. It is optimal to develop a strong professional working relationship with your principal. Communication is key to achieving PTA goals and understanding the particular needs of the school. It is up to the principal to make family engagement a school priority and create an environment that welcomes parents to the school, building a strong home-school connection. Through this invitation, parents are partners in their children's' education and all parties experience success.

SUPERINTENDENTS

The superintendent, as the chief executive officer of the school district, receives general directions and outlines of goals and policies from the school board, and is charged by the board with organizing the staff to fulfill these goals. While the principal is responsible for implementing board policy at the individual school level, the superintendent must establish procedures for employing all staff and carrying out board policies and goals throughout the district.

In almost all areas, the superintendent's actions are guided by federal or state directives or school board policy. However, no such policies or directives address the relationship between the schools and the PTA. If the partnership is to work outside the formally mandated areas of community and family engagement, the superintendent must provide the leadership.

SCHOOL BOARD

The school board is comprised of elected officials who are legally charged with the governance and operation of the school district. Specific duties include: policy making, employing the superintendent, administrative responsibility for the educational and business operations of the district, approving the annual budget and expenditures of the district, monitoring and establishing school policies, approving curriculum and procedures for selection of personnel recommended by the superintendent.

THE COMMUNITY

Every member of the community is a vital stakeholder in shared decision-making with educators, parents, and students. A strong education system brings vitality and business to the community, and likewise, growing businesses bring revenue and expertise to the school system, which may be realized in the form of business partners. Specific ways the community can enhance education is through: collaboration of common goals, providing time off for parents to attend student conferences, communicating events and success stories associated with local school/PTA, and as simple as providing meeting space when needed.

Some community establishments that can be approached in order to develop a relationship include the local chamber of commerce, business and civic associations, faith-based groups, other non-profits (particularly those that serve children and youth), service organizations, etc.

SCHOOL AND PTA

In a cooperative relationship, there exists mutual respect and an understanding of each other's rights and responsibilities. The following compares and contrasts school and PTA as a background for your PTA to build stronger and more effective relationships.

School

Tax supported
Governmental entity
Government employees

Governed by:

Federal law
State law
Local school board

PTA

Member supported
Private association
Volunteers

Governed by:

Federal law 501(c)(3)
State law
PTA bylaws

COMMON ISSUES

Money

PTA money belongs to the association and all decisions relating to PTA money must be approved by the general membership. PTA money should not be co-mingled with the money of other organizations, including the school's money. The PTA should not allow money to "flow through" its checking account for the school or any other organization. All money deposited in the PTA checking account belongs to the PTA and must be reported as income to the IRS.

Use of School Facilities

School property is government property. The use of school property is governed by policies established by the local school board. The general rule is that the school board must provide equal access to all outside groups or no access to any group.

PTA Involvement During the School Day

The presence of PTA volunteers must be according to local school policy and with the approval and supervision of the principal, who has the legal duty to oversee the care and protection of the students. PTA and the principal should develop a volunteer training process to ensure that PTA volunteers understand their roles, responsibilities and limitations.

PTA Activities or School Activities

It is critical to understand the distinction between PTA activity and school activity, particularly in terms of liability or in order to determine whether a violation of state and/or federal law has occurred. Because PTAs are subject to lawsuits, the leaders should be very cautious about planning field trips, sponsoring intramurals, offering childcare, etc. PTAs should determine whether the school system's liability insurance covers volunteers (and other third parties) who are on the school's premises. PTA volunteers sometimes are performing the same tasks as school employees and may be covered, and at other times are performing PTA functions and will not be covered. PTAs should carry general liability insurance to cover injuries that might occur at PTA sponsored events.

Advocacy & Legislation

PTA, by definition, is an advocacy association and may support or oppose legislation that affects children. School personnel, as governmental employees, are subject to the Ethics in Government Act and may not support or oppose ballot issues (such as bond referenda and SPLOSTs) on school time. In these instances, PTA must ensure that its advocacy efforts are not attributable to school employees. The school/PTA newsletter is a common problem area. If school resources, including personnel time, are used to produce or distribute the newsletter, then care must be taken not to advocate on a ballot issue. That means that a PTA flyer that contains a position statement cannot go home in backpacks because that is using taxpayer resources. However, educational pieces that inform voters about proposed legislation are permitted.

PTAs should maintain membership lists so that members can be contacted directly by the PTA about advocacy efforts. E-blasts and webpages which are paid for by the PTA and are separate from the school system support these efforts. Remember, the Ethics in Government Act only applies to governmental employees and applies to influencing voters about an upcoming ballot issue. It has no relevance to encouraging the membership to write to an elected official about his/her position on an issue or about a piece of legislation.

LOCAL SCHOOL COUNCILS

Georgia law requires that school councils be established at every public school. School councils are policy-level advisory bodies to the Principal, Superintendent and local board of education. They may advise and make recommendations on any matter related to student achievement and school improvement. The establishment of school councils is intended to help boards of education by bringing parents and the community together with teachers and school administrators to create a better understanding of and mutual respect for each other's concerns and share ideas for school improvement. PTA plays an important role in School Councils by actively sharing information between parents and the Council, keeping all parties updated to issues concerning parents and students, and encouraging school and community interaction.

Local School Council's Role

- Focus on improving student achievement by recommending changes to school policies and programs.
- Review budget requirements to ensure efficient use of resources.
- Analyze and recommend strategies to improve the school's learning environment (safety, discipline, facilities, etc.).
- Recommend strategies for increasing parental and community involvement in the school.
- Individual members are expected to maintain a school-wide perspective when making decisions.

The local school council will review the school improvement plan/strategic plan, report from the principal concerning student achievement, and the results of audits conducted by the Office of Education Accountability. To help accomplish these goals, the council may appoint committees, study groups or task forces and may utilize existing or new school advisory groups.

The School Council Law

Membership: School councils may now have more than seven members. Each council in its own bylaws specifies the number and type of members. School councils must have a minimum of 7 people: 1 Principal, at least two (2) certificated teachers elected by the teachers, A number of parents (or guardians) elected by the parents, so that parents (or guardians) make up a majority of the council. At least two (2) of parents must be businesspersons. Parents must hold a majority on the school council.

The council may specify additional members, such as, but not limited to, students, staff, representatives of school related organizations, representatives of community organizations, etc. Remember, if additional members are added, more parent reps will also be needed to maintain a majority. Bylaws determine the selection procedures for these additional members. Additional information about school councils such as meetings, officers, trainings and elections may be found on the Georgia School Council Institute <http://www.georgiaeducation.org/>

Frequently Asked Questions

Can PTA Board Members Serve on the Local School Council?

Yes! PTA members, if otherwise eligible, are encouraged to seek election to school councils.

Can a PTA Provide Funding for a Local School Council Program?

PTAs should not be considered the funding source for local school councils; however, PTAs are encouraged to partner with the local school councils to focus on student achievement. As with all PTA expenditures, funding allocations should promote the mission of the PTA and should have the approval of the PTA membership. PTAs should not fund the basics of education. (See Appropriate Uses of

Nonprofit Board Management

Governance: The Work of the Board

The word governance comes from an ancient Greek word, *kebernon*. In current usage, to govern means to steer, to control, and to influence from a position of authority. Governance deals with the distribution of authority throughout a system, whether a country or an association.

The legal framework for nonprofit boards has evolved over time. Currently, legal responsibility in general rests with the board as a body rather than with individual directors of the board. Each member of a nonprofit board, as well as the board as a group, is responsible for fulfilling three legal duties: the duty of care, the duty of loyalty and the duty of obedience.

Since to govern means to steer, influence, and control, the board has three major roles in the life of the association: to establish mission and direction, to ensure that the association has the necessary resources of funds and leadership to implement the mission, and to provide legal, fiduciary oversight on behalf of the people served, the association's members and supporters, and the public.

Establishing Organizational Identity and Strategic Direction

An association will rarely make a significant difference unless it pays careful attention to the intersection of its work and the environment in which it operates. Organizational effectiveness depends on operating with common understandings about what is important and what the organization as a whole needs to accomplish. Setting direction requires looking beyond the immediate horizon. It means asking questions such as:

- What are the issues we must confront in order to serve our mission in the years ahead?
- What are different ways of understanding some of these issues?
- Where should we be in five years?
- What are we committed to achieving?

Setting direction means taking the time to establish a framework for the association's efforts. It includes taking a fresh look at the mission, articulating a shared vision for the future, establishing major goals, and outlining strategies for achieving goals.

- **Strategic Planning** – Strategic Planning is an effort to look at the association in its environment and chart a future direction. Every board should set aside time periodically to consider the association's reasons for existing and what it intends to accomplish. It is imperative that the board should be involved in the formative stages when issues are defined, the mission is reviewed, a vision outlined, and major goals and strategies are formulated. A strategic plan need **NOT** be a long and complicated document; it does need to contain the major features of what the association expects to achieve over the next few years, strategies for moving forward, and what resources will be needed. It becomes the basis for developing a business plan or the annual operating plan and budget.
- **Financial Oversight** – Responsible financial oversight means keeping track of the association's financial health and initiating corrective action when necessary. It means asking hard questions. Financial oversight usually includes keeping track of the budget, long-range trends and needs, ensuring that financial management policies are in place, and requiring and reviewing the annual audit. It is important that the board as a whole be aware of the association's financial condition. Financial oversight implies keeping an eye on the future and on trends in the environment as well as on what has happened or not happened in the recent past.
- **Legal and Ethical Oversight** – Boards have to establish policies and provide oversight to ensure that legal boundaries are not breached. Federal laws and regulations such as civil rights laws, immigration laws, laws related to workplace safety and IRS regulations all represent constraints on

the association's actions. Boards need to keep in mind that they are obliged to operate in accordance with the association's bylaws. Review of the bylaws and policies is necessary to ensure that they accurately reflect current practices. A board must also be concerned with the association's ethical conduct. Once the board adopts an ethical code, it must assign responsibility for dealing with noncompliance.

Individual Roles of Board Members

The key role of individual board members is to participate in the association's governance structure. When accepting board membership, they become part of a group that is vested with the authority to make decisions on behalf of the association and also is accountable for the effects of these decisions. Board members have a Duty of Care, Duty of Loyalty and Duty of Obedience to faithfully execute their commitments.

Board Members Job Description

- Attend board and committee meetings
- Read board materials before each meeting
- Stay informed about the issues facing the association
- Accept board assignments
- Actively and appropriately participate on the board's deliberations
- Develop a Plan of Work and submit to a designated person
- Submit quarterly reports to a designated person
- Inform and seek permission from the President prior to sending out information to the membership
- Communicate on a regular basis with committee members on association work