

## To investigate effective/positive school partnerships particularly with the Parent Teacher Associations (PTA)

Sabbatical Report: Susan Jackson, Principal West Melton Full Primary School, Christchurch  
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### **Introduction**

This sabbatical was undertaken in term 3, 2012. This involved a literature research including a number of professional articles specifically relating to community partnerships and Parent Teacher Associations. During the term I interviewed nine principals, five Parent Teacher Association Presidents, eight New Zealand Parent Teacher Association representatives (NZPTA) and an educational consultant with experience. As well I attended the July monthly meeting of the (NZPTA) and the New Zealand School Trustees Association (NZSTA) Conference in Wellington.

I based my research around an area school, a new school, city schools, a private school, full primary schools including rural and urban schools. Decile ranking ranged from 4-10. The majority of schools visited were in the Canterbury region.

### **Acknowledgements**

I would like to thank the West Melton School Board of Trustees for their support. I am very grateful to the staff for continuing to lead the school in 'Excellence', under the leadership of Heather McHarg who was Acting Principal during my absence. I am grateful to Teach New Zealand for making this sabbatical possible. I am indebted to my colleagues and personnel who gave up their valuable time to discuss their experiences with me.

### **Executive summary**

The intentions of voluntary organisations within schools are to be commended. Volunteers are generally time poor but believe in supporting the school to enhance experiences and opportunities for all. They are built on goals to support and enhance student education whilst at the same time, strengthening relationships with the community. Parent Teacher Associations (PTA's) work hard to provide varied and clever ways to generate funds and to provide service to the school community to support schools. Managing relationships is critical to effective and efficient school environments. When PTA, Boards of Trustees and the school work in collaboration for the good of the school, setting direction, managing finances, having clear and specific roles and responsibilities, it can only enhance the partnerships of the home and school and ultimately the education of all students.

### **Purpose:**

1. To investigate effective/positive school partnerships particularly with Parent Teacher Associations (PTA) and voluntary community groups within individual schools. In particular to explore how the structures and communities complement and support

the strategic plans and goals of the school in the areas of finance, social networking, community spirit and support.

2. To provide healthy working relationships as models for other schools to use.
3. To determine effective strategies when managing potentially delicate community members.

### **Rationale and Background information**

Parent involvement in education is varied. However the two most common roles are the Parent Teacher Association (PTA) and Boards of Trustees (BOT).

PTA's are purely voluntary. Other names include Home and School, Friends of the School, Parent Support Group, Whanau Group and the Parents and Friends Association. The members of these organisations are members of the school community. Not all these groups are members of the New Zealand Parent Teacher Association.

The New Zealand Parent Teachers Association (NZPTA) is a charitable organisation which was established in 1954. It offers and provides a national voice for all school parents' associations throughout New Zealand. It is an independent organisation. It is dependent on income from membership fees, sponsorship and charitable donations. The organisation is run by a National Executive Committee which is elected annually from volunteers. The NZPTA mission statement is "To work within the education system, to encourage parent and whanau involvement and participation to assist all children develop their talents, self-esteem and character and to ensure they have the ability to lead a full and productive life" (NZPTA fact Pamphlet).

The other main form of parent involvement is The Board of Trustees (BOT). Boards were established in 1989 as part of Tomorrow's School's, introduced by the Government. They replaced what used to be called the 'School Committee'. The BOT is the legal governing body of the school and trustees are elected to their role by the community. They have legally binding regulations to comply with. While roles are voluntary, BOT members receive a minimal financial acknowledgement.

All schools have a principal or Chief Executive Officer (CEO). Their role is to manage the school. The principal implements the policy and the Strategic Plan which is developed by the BOT in consultation with the staff, parents and community.

When all three roles support, guide and work together for their school it can be very rewarding and beneficial for all and ultimately the children.

### **Literature Review**

Most of my research was spent interviewing and collating good practice models developed by individual schools specific to their needs. Some commented that they had found little research literature specific to assisting schools to help develop the role of Parent Teacher Associations. Pamphlets provided by the NZPTA were helpful especially developing job descriptions for roles and responsibilities. It produces a practical magazine with constructive articles and suggestions to support and contribute to PTA's.

School principals generally did not spend a lot of time reading literature specific to PTA's although there are a number of articles and books on the market discussing building relationships with the community.

The Education Review Office publication, *Partners in Learning: School's Engagement with Parents, Whānau and Communities June 2008*, briefly discusses the PTA as a way to involve and increase parent and whanau involvement in the school. Some schools implement the PTA programme called 'Give me 5" where the expectation is that parents give five hours of their time annually to the school. Parents can contribute to the school in a way that suits them and at a time that works for them.

176 Ways to Involve Parents written by Betty Boulton is a practical book discussing a wide range of ways to engage the community in school life. It is easy to read and has some excellent practical suggestions to implement into a school environment.

### **Research methodology**

During the course of my study I interviewed fifteen informed personnel including nine principals, five Parent Teacher Association Presidents, and an experienced Educational Consultant. I wanted a variety of schools to provide a broad spectrum of volunteers in school sites.

The following questions formed the basis of the interviews:

1. What is the role of the Parent Teacher Association and /or voluntary committees in your school?
2. How do schools communicate/manage/liase with school communities?
3. What level of involvement does the PTA (voluntary committees) have in your school environment?
4. How do schools set goals, manage and delegate income generated from fundraising?
5. How do schools build and sustain an effective model to build capacity and encourage community involvement and sustainability?

For the purpose of this publication I have referred to individual schools/interviews as school A, B and so on. I have summarised each interview under three main questions based on my findings.

1. *How the structures and committees complement and support the Strategic Plans and goals of the school in the areas of finance, social networking, community spirit and support*
2. *Healthy working relationships as a model for other schools to use*
3. *How to manage challenging conversations including effective and sensitive handling of community members (communication)*

## Findings

This is my perspective as an experienced Principal of a high performing decile 10 school.

### ***How structures and committees complement and support the Strategic Plans and goals of the school in the areas of finance, social networking, community spirit and support***

#### School A

The governance manual for the BOT formed the template for the Parent Community Group (PCG) constitution including job descriptions; defining new roles members would be responsible for, code of conduct, meeting protocols, and an agenda template. Everything is clearly articulated and related to this reference/guiding document. "We looked at the NZPTA constitution and finally formulated our own school specific constitution created by the principal and PCG chair in the holidays. This was then presented to the PCG and inducted and formalised with the group collaboratively by both the PCG chairperson and the principal."

It provides a clear understanding on how PCG needed to operate and gives the PCG chair direction.

The PCG consists of a Chair, Treasurer, Secretary, staff representative and eight members all with different fundraising responsibilities. Ideally a PCG committee shouldn't be bigger than the BOT. Eight is an effective number especially for meetings. The idea is the members are not the organisers of everything, they delegate to people indicated on database. Their role is to help or lead. It is too much of a burden on members to do everything. Shared workloads with the community are still a work in progress for the PCG. The principal attends PCG meetings once a term.

The BOT and PCG work together in partnership. The PCG has a voice. Suggestions are passed to the principal who then tables these suggestions at the next board meeting. If the board approve, they have full support. Once money is raised for a specific project it is then transferred into the school account and the school pays for the project. It is streamlined and well managed. There are no issues around who owns the project and tax benefits are clear. Legally any equipment on the school site belongs to school which is the responsibility of the BOT. The funds are raised with a purpose and the money is spent accordingly.

#### School B

This small area school struggles to provide regular fundraising for the school as they are heavily community based. They are conscious of targeting the same members of the

community for funds as they are also competing with other worthwhile local community based groups for funding e.g. rugby, netball, fire and church groups.

They have eight members on the core committee and they co-opt members of the school community onto specific projects when needed.

They subscribe to the NZPTA 'Give me 5' programme.

#### School C

This is a committee based organisation struggling for members. They have a core group of 6 members (10 declared as members) and have 1 hour meetings 7.30-8.30pm Their constitution is based on the NZPTA constitution. It needs reviewing and is not school specific. They don't refer to it at meetings.

#### School D

This Home and School Association (HSC) is a small core group of "amazing people!" There is a sub-committee that focuses on one major fundraiser a year, raising between \$40-50,000.00.

Prior to the current principal, relationships with HSC had been dysfunctional due to how raised money was being allocated. There were factions with principal, the BOT and the HSC. The current principal has worked hard and successfully with the HSC to rectify this issue.

Currently the deputy principal and principal alternate attending the monthly meetings which are generally 1 - 1.5 hours long. The Annual General Meeting is held at the beginning of the year which the principal attends.

There is a clear paper trail of requests which are formally minuted. There needs to be a quorum to vote to allocate funds above a certain amount.

#### School E

This school operates a Home and School Group (HSG) which consists of a small group of 7-8 hard working parents. Their purpose is fundraising and service to the school. The school focuses on one major project each year utilising contacts in the community to benefit maximum output. The HSG chair has a good understanding of how the school operates. There is a sense of frustration due to lack of support from the community.

The Principal is the liaison person with the HSG and attends meetings, meets with PTA chair once a week informally where they discuss an agenda, the current status of the school, where it is heading and what the school want funding for. Fundraising suggestions are discussed at the beginning of year and continues to be a work in progress.

The HSG ask the principal for a wish list with input from the staff at beginning of the year. The principal then prioritizes these. What works well for this school is that the HSG can see first-hand the rationale for the request. This was a very convincing process.

#### School F

This school operates a Home and School Group (H&S). The Principal doesn't attend meetings which are held every two months. Before the meetings the H&S ask the principal for a wish list. There is no staff representation; however a board member attends in a liaison role so the board are aware of what the H&S are doing. It is also an opportunity for board input. The principal gives direction and the board representative attends to listen and report back to the board.

Meetings are one hour. They don't tolerate gossip or negativity around the school. A strong chair needs to lead. Through community consultation and feedback taking into account parent's needs, they meet between 2-3 pm to accommodate family time picking up children.

Sustainability is a concern. Currently they have five members. Although they would like more, parents are time poor and it is hard to generate interest. However the community always do anything if asked to support the H&S. It is about thinking creatively.

The school has a covered swimming pool which was funded by the H&S. Community grants are applied for every two years to support the on-going running of this facility.

#### School G

The role of the Parents and Friends Association (PFA) is to promote the family and help with the school. The purpose of the PFA is to 'enhance the experience of the girls while they are at their school of choice.' Being a private school, there is a fixed cost for every parent, therefore the fee is guaranteed as a lump sum in February. As such the PTA doesn't necessarily fundraise.

They meet the first Tuesday of every month and manage a budget of between \$25-35,000 annually. There is a perception that they should generate funds whenever they contribute to supporting school events.

#### School H

A highly functioning enthusiastic PTA now operates. However, prior history indicated some tensions around misappropriation of funds. As a result, the Board of Trustees became involved developing a new constitution, processes, signatories and banking functions were reviewed and implemented. Now there is a successful and strong membership with clarity around processes.

The principal doesn't attend the monthly meetings. However, the principal's report presented to the monthly Board of Trustees meeting is presented/tabled at the PTA meeting to ensure the PTA are informed of school progress. A staff member attends all meetings representing the principal and the school. This allows for continuity. A board member attends every meeting based on a roster. They report back to the board.

The needs of the school are based on the Strategic Plan.

#### School I

The establishment of the PTA framework and structure was a priority. The PTA is a committed and hard working group of volunteers bringing on new people all the time. A succession plan promotes bringing together new parents every 2-3 weeks. A member of PTA collects parents and takes them for a tour of the school introducing the key personnel.

This PTA is more around community social support rather than fundraising. The large and active PTA encountered a few issues. The main one was losing their chair. They needed direction as to the new PTA chair. This was discussed at length by the Board of Trustees. The principal and board chair worked together to address the issues.

It was a good opportunity for the board to work more closely with the PTA. They utilised the strengths of a board member skilled at policy writing, creating a vision and developing a framework. The PTA and board member spent 2-3 meetings discussing issues before informed decisions around office bearers were established. Their vision underpins everything they do.

- What they are there for - Their vision is 'to help engage parents to serve the school in its vision and values so that the kids can have the best school experience as possible'.
- How they do it - Involve, promote and resource. Through all the how's the PTA seek to role model the schools vision and values supporting the school to be the school of choice.

The PTA refers to these protocols when decision making. They model school qualities in their behaviour. All members of the PTA sign this document and it acts as a code of conduct and assists when confronted with any form of conflict.

The document was developed because the PTA needed clarification around their purpose and role within the school environment. This was preventing other members of the community volunteering to support the school. It was impacting on the wider community. The principal needed to be calm and deal with the issues not personalities – it works.

The board and the PTA make decisions around finances but the principal is approached first for input and clarification. The minutes of meetings are circulated soon after the monthly meeting so all are aware of decisions made. Funds raised support the Strategic Plan.

Staff requests are given to the principal. This is then considered at board level then passed to the PTA for approval/discussion. The money is then transferred into a separate account under the school name.

Monthly meetings are held at 3pm to meet the needs of families. Children are in the playground supervised by older children. The principal tries to attend monthly meetings.

The school can draw on funds anytime. This is acknowledged by the school. Small amounts are raised by the PTA but they feel like they are contributing.

## School J

At this school, wish lists are prepared and prioritised by staff. The leadership team make the final decisions. This is then taken to the PTA. At times the loudest voice was heard. The principal and PTA chair are aware of this.

Large amounts of money are raised annually due to a database of all occupations of community members on the school roll in which the PTA confidentially referred to for support for events. It was a very effective way of engaging members of the community.

There are no surprises for the PTA as well as board at meetings. There can be strong community members who tend to dominate meetings. The PTA chair needs clear and effective guidelines to ensure all have equal speaking time. If an item is not on the agenda it is carried over to the next monthly meeting to speak with a time limit of five minutes.

A strong board and PTA chair has an impact!

## School K

Before the current principal was appointed, a strong but small PTA had established roles and felt direction was well set. From the principal's perspective, areas of fundraising weren't directly connected to the school. There was internal conflict around relationship issues and on decisions being made that weren't agreed to by all. Resignations were received as a result. Decisions were made without consulting the principal with no cohesion on decision making. Processes needed to be put in place.

The principal believes the PTA needs more direction from the Board. This is a work in progress. The PTA is working hard to generate more help and support. They want to establish a database of contacts for ease of communication and support. Previously most documentation was kept offsite making operating difficult.

Recently, the board had training and have worked hard on their strategic planning. They needed a deeper understanding of school direction before they were able to discuss direction with the PTA. The next step is identifying areas of need for the board and to then have the valuable round table discussions with the PTA. There needed to be clarity around board roles and responsibilities before the PTA could understand their roles and responsibilities.

The current PTA chair has been in office for eighteen months and works hard to manage relationships and differences of opinion. Members now show more respect for decisions made and work towards the same goal. The PTA is now more cohesive and works as a partnership sharing the load. The PTA committee consists of fifteen members with ten core members, a treasurer, school guardians, a secretary and the president. They use the NZPTA constitution from 2009. This was due for review in 2012.

Decisions for projects targeted for fundraising are decided by the board of trustees. They then approach the PTA.



The deputy principal and a board member attend the monthly PTA meetings. The principal attends some meetings but is unclear of what the role is. The principal doesn't vote. They meet for an hour from 7.30-8.30pm. The meeting protocols are established with an agenda presented for every meeting.

## NZPTA

The varying roles of the New Zealand Parent Teacher Association (NZPTA) include advising and supporting principals and Parent Teacher Associations (PTA), providing professional development (conference) and maintaining and updating communication via their website. They produce pamphlets and hand-outs and numerous reading material including their newsletter - 'PTA News'. They are there to benefit all schools.

There was some discussion around the delegation of finances raised by PTA's. They suggested clear communication guidelines and protocols discussed and agreed to by board, PTA and principal. The decisions around the funding of certain projects needs to be discussed by all three parties.

There have been financial issues around misappropriation of funds, a dominating treasurer, financials incomplete, funds unaccountable, poor bookkeeping, books not checked each year and lost receipts. One of the ideas the Charities Commission are looking into is the auditing of PTA's as they are becoming more accountable. Currently they don't have to be audited and it can be difficult as it is the school name. It also guards against fraud.

## Educational Consultant

The PTA raise funds, hold it in their account, and then pass it onto the school as a gift in the area that has been designated for an already agreed project. The school will use funds for that agreed purpose.

The PTA is a separate entity with their own constitution. They serve the school, but remain totally independent. This can have the potential to be conflicting. Money is raised by the PTA with the intention to fund an agreed purpose. The PTA is committed to pass on funds to the principal on behalf of the board. Once the tagged funds are in the school accounts it is tagged as a funding gift received from the PTA. If the purpose to raise funds changes for whatever reason, for integrity's sake, the principal needs, on behalf of the board, to go back to the PTA and explain and discuss why and further discussions around the use of that money is suggested. The PTA has handed the funds over in trust. At times there is huge confusion over who owns the money.

## **Examples of healthy working relationships as a model for other schools to use**

### School A

The Parent Community Group (PCG), the school, the board and community work hard to be as consultative as possible.

The PCG have two goals:

- 1) To support the school community and to give back to the community.  
The PCG will organise events – to bring parents into the school to provide support needed for the children
- 2) Fundraising for the benefit of students, generate an income

This is a successful model group, who are motivated individuals giving up their time to help with the success of their school

Projects for the year are determined in February where the Principal reports to the PCG of the BOT's strategic direction. This provides the PCG with direction for fundraising. Teacher and student voice identify areas children need items for during that year. The PCG set a strategic plan for 3-4 years and identify what they want to fundraise for. This includes minor things that could be generated in the short term then broken down into term activities so there is a good balance of the giving back as well as the fundraising aspect. The school is conscious of parents dipping into pockets all the time and try to balance financial requests.

Parents are busy and committed trying to meet everyday demands. Schools need to be smart in how they engage their community. Digital perspectives work very well. Engagement/communication about events for parents over a school year that brings children in, generate excitement and the giving back. Induction of new members by the principal and PCG chair is very clear.

#### School D

The principal is aware of the HSC concerns and has worked hard to reach common ground/direction on where money is to be used. The principal made this a priority by ensuring the HSC were well aware what the money was to be used for, before being raised.

Now the principal and the board suggest where to use the funds collaboratively. This is then taken to the HSC. The principal is always open to ideas from the HSC on how they want to use the funds and is prepared to listen to what they have to say. To date any request by Principal has been approved. ICT/E-learning equipment (Interactive, projectors, I-Pads...) requested. There are occasional murmurs from some members of the community on why the school is spending money on a particular project. The principal is aware his perception may polarize people.

The Strategic Plan wish list is how the funds are delegated. For the last three years it has been tied in strategically with a large agreed project. An ICT e-learning action plan has set direction and guided the HSC. It is very specific and was reviewed at the end of 2012. The philosophy of the HSC is to fundraise for a big event. They also apply for community grants to supplement fundraising projects.

The decision making process for the distribution of funds raised is initially with the principal and the board chair. The outcomes are then taken to the HSC for discussion.

Socially the HSC coordinate first time parent morning teas once a term. A liaison person makes personal contact with all new families. Introductions make connections for new parents particularly if they are new to the community. They actively organise discos, post fair celebrations and invite anyone who has helped.

#### School E

The school decides what/ how funds/projects are decided. However, there needs to be a balance as the HSG raise the funds. Their ideas need to be accepted for discussion. They need to feel valued. The Principal attends meetings well prepared to answer questions and to generate healthy discussions. Sometimes the principal doesn't have the answers but feeds back to chair with outcomes for further discussion. The principal works as best as they can with the HSG. Some members prefer a healthy bank balance, whereas others prefer to spend the money raised in a year to be spent on school priorities that year.

#### School F

Strategically at the start of year the H&S estimate their fundraising income for the year. The previous year in Sept/Oct in discussions with the principal, they guarantee an agreed amount based on a wish list prepared by the principal. This is given to the school in February.

In February, the principal presents the H&S with a wish list and invites them to select items they will financially support the school with during the year.

Communications with the community are through the school newsletter. In February the H&S outline the proposed financial contribution to the agreed targeted projects - it is the schools intention to report to the community regularly on funds spent. This is a work in progress.

H&S request help from the community to support projects. They involve the children to assist. The H&S receive help in lots of ways and know where and how to source this help.

Decisions around projects and finances incorporate student voice for ideas. The community try to spend wisely. The school operations grant is well used. Consultations in decision making make sense.

The school community contribute in various ways especially around the big fundraiser involving the wider community.

Service to the community involves food vouchers to members in the community who are struggling, hardship funds for families including school camps/trips, coffee and cake after school for new parents. Every term the school has a celebration of learning involving the

community. They try and keep fundraising and service to the school separate where possible.

There are clear guidelines around using the school name. This is a board directive.

The H&S don't apply for any community funding. This is the role of the principal. The H&S group do what they are good at - supporting the school financially and socially.

### School G

The PFA represent the perspectives of the school, parents and the girls. The PFA is a private enterprise which is operated by the parents whose responsibilities allows expenditure outside what would be school expenditure. Therefore, their mission statement is to fulfil the extra needs required and goes beyond the structure of the school itself.

The 'Development Centre/Committee' which is part of the school structure does the fundraising of events directly for the school. However, both work together supporting the school. The PFA generally supply personnel and hours - they lend a hand, the feet on the ground, providing critical manpower. They also sell product to raise funds for the Development Centre/ Committee. But they are more about the social aspects and covering associated costs. They have their own criteria, discussed with the school, but have opportunities to contribute to discussions.

The principal and a board representative attend the monthly meetings. The principal presents a school report on progress and a suggested wish list. There is robust discussion but all parties are reminded of their purpose, "will it enhance the girls educational experience/opportunities while they are at their school of choice". Students are asked for their contributions and are invited to the monthly meetings to present their suggestions. Parents can write a proposal to PFA for discussion.

The PFA consult with the principal in the first instance as they are the professional. It is a learning curve for all.

### School H

For succession planning, office holders are rolled over for a term of two years. This prevents losing all office holders at one time. Possible future discussions include staggering office bearers of secretary and treasurer for one year moving to chair the next year.

Currently the chair, secretary and treasurers role is co led and is working very effectively.

In 2011 \$50,000 was fundraised and deposited into the school account with no caveat on what the money should be spent on. Historically staff went directly to the PTA. Now staff and principal work together to create a wish list which is then prioritised by the leadership team. Funds are spent accordingly. There is a strong desire to support resources that children use to promote learning.

The PTA deposit funds raised into the school account and the school decides based on the wish list, where to allocate the funds.

#### School I

Regular fundraisers more than helped in many ways. A goal of this PTA was also to get parents involved in the school.

There is a PTA member representing every classroom. They have a confidential parent list for that room and act as a liaison person when PTA need additional support. More and more parents are working. Parents that didn't work gave their time.

The PTA is sold as being part of the school working alongside staff, principal and board bringing the community together and getting them involved. As many parents are time poor some prefer to write a cheque.

#### School K

The PTA is trying to promote its role within the school community by being transparent, communicating, having a page on the school website for minutes, photographs (a work in progress) requesting help, without having to join the PTA and socialising with the board and staff. They want to develop more community spirit. The PTA is acknowledged in the school community. The PTA president has worked hard to be visible assisting in the playground, meeting and greeting community members at the gate, handing out newsletters when picking up her children. The community are aware she has a connection with the board and the school. It is important for the PTA to see how their money has been used. There are presentations at meetings promoting transparency and communication with the community.

#### NZPTA

There are many successful models of effective and efficient PTA at numerous schools throughout New Zealand particularly rural schools. Generally there are up to eight members on a PTA delegating to various sub committees or co-opting community members to support a fundraising event.

One school engages the community inviting people in the door as part of the community.

Building community is achieved with the PTA having a presence at school events - parent interviews making new parents welcome. This is a great opportunity to promote the PTA within the school environment. Any event involving new parents, the principal invites the PTA and acknowledges their role with the school. The PTA establishes a presence at anything that has parent involvement.

#### Educational Consultant

An effective model is when the PTA meets with the principal and the board chair around budget time once a year to discuss school priorities other than what schools can cover in the budget. The PTA now has direction and can focus on these targets and begin to serve the school.

The principal, staff, PTA and BOT are all serving bodies of the school, primarily to serve the school and its interests by providing a high learning environment for students.

Clarity of the roles is best achieved by collaborating with the principal or Chief Executive Officer (CEO), discussing the strategic direction from the BOT developed Strategic Plan. The principal knows what the needs are.

The board needs to be aware, acknowledge and appreciate the PTA. Recognition should be directly involved with the principal as a collaborative practice. It is wonderful when it works well. However, the consultant has seen evidence of the PTA becoming disconnected from the school and doing their own thing. The board and principal need to take time and effort to encourage the PTA in their role.

For effective sustainability...

- 1) The environment/vision needs to be in unison with the school. It needs to be positive. The PTA are advocates for the betterment of the school. People like to belong, to be hands on and believe in the good of the school. If the atmosphere and capacity building within school whanau/ family organisation has a positive tone then recruitment of positively driven people is more likely to be part of a healthy productive committee.
- 2) If the environment is negative, whingey and whiney, moaning and dishing the school, people will be reluctant to attend. This has the potential to lose good enthusiastic committed people. Generally they don't want to be in an environment where they believe it is a waste of time and energy.
- 3) People are time poor. Their lives are busy. They want to go to a meeting and deliberate over important things impacting positively on the school and make decisions.
- 4) PTA's need to be a proactive and well organised group that has a clear understanding of what its goals are. The principal and board prepare the budget then invite the PTA to discuss areas the board and principal encourage the PTA to raise funds for. The PTA now has a clear purpose/direction.
- 5) Sometimes PTA's need to reinvent themselves, as well as other organisations. Doing the same things the same way doesn't always suit everyone and produce the best results. The world of technology is increasingly becoming the form of communication and fundraising ventures

The principal needs to familiarise themselves with the PTA or school specific constitution.

It is also important the PTA have some understanding of how governance and management works in schools so there is clarity.

In some situations there is a misunderstanding on the principal's part due to a lack of training. Most principals don't want to rock the boat with PTA. But it is all about collaboration. Principals need to ask the question, what is my relationship with the PTA? Who do I need to talk too? The negative can become challenging!

An example of a very good model is based around the governance manual for the Board of Trustees. This includes terms of reference - the how and what the PTA do, what the PTA are about and why they exist (roles and responsibilities).

PTA can invite board members to attend meetings. It is not obligatory. It is more important for the principal or staff member to attend representing the school. If a board member attends it needs to be clarified as to the role they are representing - either that

of the board or as a parent. This is very difficult as members of the PTA will always see the board member!

***How to manage challenging conversations including effective and sensitive handling of community members***

School A

This school makes sure there are strong parameters around roles with clear guidelines. This is an important step because the perception of members of what their role was didn't align with the purpose of the group that the board gave that delegation to set up from.

Prior to meetings the principal and PCG chair communicate either face to face, by phone or email, to confirm the agenda. Agenda items are specific with different sections – reports are updated as required, general business, fundraising reports and an opportunity to provide a verbal report by the principal.

Communication with the community is very important. Many offer their support but this didn't go any further. It was a bit hit and miss regarding availability. So PCG created a Google form (on school website) sent to parents to offer their time by providing details of what they are interested in helping with and times that suit. This is completed by the end of February. The PCG has access to the list and make contact for support. They have a high strike rate which is very successful. An excellent model of engaging the community and supporting the core PCG members.

A section in the school newsletter and website provides updates to the community. This is the responsibility of PCG chair. All correspondence goes through PCG chair for approval first.

BOT/PCG is a partnership. The public relations role on the board attends PCG meetings. This works very well. They are there as any other member.

School B

There is a perception that the government pay for everything to educate students from some members of the community. Community members are very busy and some prefer to donate money rather than time as a matter of convenience.

School C

The communication between PTA and school has improved over the last two years. The teacher representative is improving communication. The school secretary is a link to the PTA. The new communication tool 'School Links' is excellent in helping inform the parent

community of events and asking for support and assistance. Board members are needed for different perspectives and information sharing. There needs to be clear channels, systems and procedures. Delegations need to be clearly defined. The PTA previously informed school community of events through the school newsletter. Of concern is the dwindling number of active members currently involved with the PTA. There is a page on the school website designated to the PTA, but members are unclear on how to use it therefore it is not effective. The Google calendar proposed will help to assist with year events once members are assisted in its functionality.

After the monthly meetings there is currently no communication with community. The PTA believes people need to come to the meeting to know what's going on. However, this can be detrimental to the effectiveness of the PTA.

The current PTA is poorly supported by community. People are afraid to volunteer for fear of offending others. The PTA wants to lift their profile in the community. Notices are ineffective. "We have very capable parents however they don't want to push themselves forward and don't want to exclude others in the community. They are unclear why this is the case. It can be a clicky community".

The current PTA has distanced themselves from the community. They have been focussing on a large fundraiser rather than little community events. PTA members all work so are also time poor. They want more active involvement and support with school events not just fundraising but the social aspects of giving back to the community. They want the image to not always be being out there asking for money. They are juggling careers and giving up time to support the school

Their goal is 'how to build and sustain an effective model involving a supportive community'.

They need to change the perception the community have of them and break down barriers. They need more direction from the school and hope to target community members of students in the middle school to build capacity as they are already established and confident with the school rather than the new parents.

The school has a funding application package they submit during the year for any fundraising requests providing a clear paper trail. The school is trying to consolidate applications and circulate two weeks before the monthly meeting to all members so they are prepared for discussion.

The principal presents the Strategic Resource Management Plan in February so PTA are informed. Currently the community don't know what the school needs (makes it difficult for PTA fundraising projects). The PTA needs to know what the strategic goals are on the resource plan. There needs to be clear communication and more support between board, school and PTA. The PTA is unclear where the board see the role of the PTA.

There is a need for a succession plan for big fundraisers.

School D



Communication between the Principal and HSC chair is informal. There is no written report by the Principal at the monthly meetings. Requests are accepted during the year from the principal. The principal likes to think he has listened to people with reservations over any requests.

#### School E

Previously there were issues around the role of the HSG. The principal engaged an Educational Consultant to clarify and work with the principal, Board of Trustees and HSG. As a result Boards and HSG need to be more involved and communicate with each other - find the balance.

#### School F

Major conflicting issues around relationships, finance, community gossip, lack of consultation and communication, who decides what, power conflicts, lack of clarity around roles within the school all led to a tense and unpleasant environment for the school to operate for all involved. It was a divisive community with a 'them and us' attitude. The newly appointed principal endeavoured to provide a means for all parties to cooperate and work together. Eventually the HSG folded and a new group formed who are working with and for, the good of the school.

A traditional rural town of hard working but time poor community members with increased rentals and rates impacted negatively on this small hard working community. The principal, HSG and Board work continuously to build relationships within the community and are well aware of financial constraints when requesting funds from the community.

The Principal trusts the HSG. They know what they are doing and informally catch up regularly discussing the current situation, and where to in the immediate and long term.

#### School G

The PFA endeavour to engage with community wherever possible.

#### School H

It is important to engage the community and to keep them informed. Parents need to know what the funds are being spent on.

Socially the PTA welcomes new parents at an afternoon tea every term and provides various support whenever the school asks. For example they assist staff for playground duty based on a roster. Parents are inducted by a teacher. They organise the end of year lunch for year eight leavers and families rather than year eight parents. They contribute to open evenings operated by the school, sell second hand uniforms and new family contacts are given to PTA by the school secretary.

#### School I

The PTA produces a booklet specifically for parents including information they might require. It is a rewarding job which they take very seriously. They invite new parents to contribute their time and value any form of contributions. Sometimes they ask them specifically to assist for a special purpose such as engaging with the Pasifika communities.

The staff is very supportive and attend meetings, building community with staff and the PTA. They are all involved.

The school database assists the PTA in their fundraising events.

#### School K

The PTA is working hard to develop a succession plan to ensure new members by targeting community members of year 3-4 students.

Unfortunately some members of the community see the role as a PTA member being too much work. They see it as another committee. The PTA is trying to change this perception and incorporate fun evenings. The school is trying to be innovative in its methods to meet the changing society needs of being time poor by using technology and operating efficiently.

The goal in the next 5 years for the PTA is to maintain numbers and have more direction which is aligned with the school. There needs to be more communication with the principal that provides the PTA with options that are priorities for the school. The board are working on linking this to the strategic plan. Whilst they make the overarching decisions, they need to consult with the PTA and the school.

#### NZPTA

One of the most difficult problems facing NZPTA is the lack of communication reaching PTA members within schools. Not all correspondence is passed on.

The principal is the backbone of the community and the Board of Trustees (BOT) the nuts and bolts. Within PTA's there can be power struggles. The role of the principal and the board is to clarify and manage these issues professionally and carefully to benefit the school and work together. Some are huge issues especially around the power of delegation and finances and just working with other people in the PTA and community.

Communication is a great word. It is the 'how' that needs clarification. It is suggested the PTA chair set a time with principal at least once a month to discuss the progress of the school and seek any clarification/advice (no surprises). Some PTA's have to deal with personality conflicts, power struggles, the need to have a clear understanding of how to run meetings and know how to develop constitutions.

#### Educational Consultant

Problematic issues involving relationships are mainly between the PTA, school/principal and the Board of Trustees- a triangulated relationship between the three. There needs to be clarity around these roles.

The number one key to any organisation that operates a voluntary group providing support for the school is that all three relationships need to have clarity around roles and responsibilities. These need to be in the written form illustrating clear understandings of how the three roles work together. If this is not the case, there is the potential for negativity to take the school to a place it doesn't want to go.

It is important the three have a good working relationship. However, none of the three are obligated to incorporate the other into their role. The principal is part of the board. The board sometimes work directly with PTA or with the principal. At times the PTA dictates to principal... we have money this is what we are going to use it for. This is not a healthy environment.

The PTA can potentially take on rogue characteristics that can conflict with school priorities. The relationship between the principal, the board and the PTA needs to be respectful and all need to understand roles and have a clear understanding of how the relationships work together. You can't legislate any one to be a member of any group.

### **Implications**

When Parent Teacher Associations, boards of trustees and principals of schools have an understanding of the varied roles and responsibilities, each can effectively contribute to the operations of a school. There are great and many opportunities to build strong and effective partnerships to support the school providing the best educational opportunities for the students.

Respectful relationships built on trust, clear and specific roles and responsibilities, setting of direction based on the schools guiding document the 'Charter and Strategic Plan' are critical to the success of a school.

Empowering members of the community to want to contribute to the life of the school in any way is best managed when they feel welcomed and valued, there is fun built around commitment, meetings are efficient and positive, decisions and outcomes are made for the good of the school, people feel they are / have made a difference, the PTA has established meeting protocols agreed by all and feels supported by the school and the Board of Trustees.

Communication needs to be a three way process between the Board, the PTA and the principal. Effective and regular communication and informing each other within the school environment results in positive outcomes. This needs to be a priority so all groups work together and support the school.

The setting of direction and providing the PTA the opportunity to feel valued in their contributions empowers them. They need to be acknowledged frequently and in many ways by both the principal and the Board.

The presence of the PTA around schools doesn't always need to be for fundraising. Many schools interviewed indicated they felt part of the role was in a volunteering capacity and having a high profile and presence around the school. For example, supporting the school

with open evenings, meeting and greeting new families to the school, assisting with working bees, having a presence at local school events and being involved in any local community events lifting the profile of the school and their role.

Some PTA's have or are in the process of establishing a school wide data base (with parents permission). This provides the core PTA committee with the opportunity to request support for a fundraising venture or to assist the school by co-opting community members and local businesses in their areas of speciality or passion. Schools who already operate this way have found the support more streamlined, fair and effective.

Building capacity/sustainability is an area that PTA's continue to develop. As parents are time poor and heavily committed with busy lives, schools need to reflect and consider how they engage their community and think about the use of technology to support their important role in the school.

Of paramount importance is a shared vision with a shared constitution which can be school specific or based around the NZPTA constitution. It needs to provide a clear and consistent framework of how the PTA is going to operate.

### **Key recommendations**

Open, honest, transparent and regular communication with the community provides a strong foundation to continue to build on the strong home school partnerships supporting a successful school community. All three groups should review the constitution and how the PTA operates together on an annual basis.

Further study into other ways of working with a bi-cultural/multicultural school population would enhance this study and inform practice for schools with a multi-cultural community.

Provide a clear and specific vision for the PTA. The vision needs to complement and support the school's vision and Charter, all working for the good of the school. There needs to be clear terms of reference developed in conjunction with the PTA, Board and school. This needs to be documented. The how the PTA are going to implement the purpose allows for the decision making process to be effective and clear to all.

The PTA is accountable for having a good relationship with all groups.

### **Conclusion**

An effective PTA provides the community with a high profile and supportive group of committed volunteers with the purpose of enhancing the experience/opportunities of students while they are at their school of choice.

Procedures and systems are critical for the success of the PTA and school/community relations.

Communication is best when it is current, frequent and considers all three parties, and relates to the strategic plan.

A central part of the wheel is having clearly defined relationships. Annual self-review and reflection on how these relationships are working and building capacity and sustainability in schools is effective and efficient operations. A collaborative relationship is critical to success.

It is also about acknowledging and celebrating all families/whanau engaged in fun community activities.

People dynamics can change everything. Thus there is a need for clear roles and responsibilities, purpose, protocols and guidelines.

### **Bibliography**

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