Message from Superintendent Laura Mitchell

Dear Parents,

We all know that delivering a high-quality education for every child has its challenges. For me, it’s hard to imagine handling these hurdles without thriving parent organizations working in our schools with us every step of the way.

Parent organizations have proven to be our greatest allies in our efforts to ensure that every student in Cincinnati Public Schools graduates fully prepared for life. The level of volunteerism, political advocacy and fundraising cannot be understated. Just as with teachers, parent organizations are on the front lines of efforts to give students what they need to succeed.

Some of our schools don’t have active parent groups, and we hope to change that.

This tool kit outlines the purpose, structure and governance of parent organizations, and it should serve as a guideline to help you get an organization started at your school.

It has been said that the best schools in the nation are backed by thriving parent organizations. I hope you will work with us to ensure that all students in Cincinnati Public Schools receive the world-class education they so richly deserve.

Sincerely,

Laura Mitchell
Superintendent
Welcome to the start of a great journey!

We thank you for your commitment to launching a parent organization in support of your child’s school. **It is parents such as you who make Cincinnati Public Schools a great place for children to learn and grow.** We know that parent- and family-led organizations play a vital role in supporting children’s education.

This tool kit was created by a team of dedicated CPS parent leaders and school and Central Office staff to guide and empower our volunteer leaders to work together to develop strong school-supportive parent organizations. We also used information provided by the National Parent Teacher Association (PTA) and Parent Teacher Organization Today (PTOToday.com).

In this tool kit, parent organization refers to any **non-school organization (NSO) that is separate from the school district**, including, but not limited to, parent/teacher organizations and associations, booster clubs, alumni groups, social committees, foundations, and “friends of” groups.

*(Printed in this book, for your information: NSO Board Policy No. 9212)*

This tool kit offers guidance on organizational and financial procedures to enhance the school-year experience for students, families and school staff. It provides a streamlined process for parent organization start-ups and for ongoing success, to help ensure that all efforts support student growth – academic, social and emotional.

Inside you will find information about how to form and organize parent groups, links to templates of helpful documents, descriptions of member responsibilities, and policies and procedures related to forming a parent organization.

You are embarking on an adventure that can be one of the most rewarding, and, at times, challenging, opportunities of your life.

**We hope this tool kit increases the rewards and eases the challenges!**

Disclaimer: This tool kit provides general guidance for recommended financial practices and operational procedures for parent organizations. The opinions expressed are those of the developing committee and are not meant to be a legal interpretation of the law or authoritative. The material included is dated as of January 2018 and is subject to change. Official interpretation of particular questions should be obtained through the legal counsel for the Cincinnati Public Schools’ Board of Education, the Ohio Department of Education, the Examiners of Public Accounts and/or the Internal Revenue Service. The development committee assumes no responsibility for consequences resulting from the use of information provided.
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Getting Started

Recruiting Members

The first step in creating a parent organization is to recruit others to join in. You want to reach out to as many parents/guardians and family members as you can from your child’s school. Ask the principal, teachers, resource coordinator and community members to suggest names of parents who might be interested.

Spread a wide net to catch a lot of people, but know that it only takes a few dedicated people to get your parent group up and running.

Partnering with Your Principal

Your school’s principal should be your first partner and the first person to talk to about forming a parent organization to support the school. The relationship between a parent organization and the principal is critical to ensuring success. The principal understands the incredible value of family engagement and values your support.

Try these suggestions for ensuring success of your parent organization:

- Listen to the principal’s vision and goals for the school.
- Establish two effective communication channels between the parent group and the principal (phone, email, etc.).
- Keep the principal informed of the organization’s goals, actions and impact.
- Ensure that the organization’s efforts are linked to learning (Kindergarten readiness, literacy, math, ACT, high school AP Exams, graduation rate or acceptance into Career Pathways).
- Invite the principal to attend all meetings.

Schoolwide Promotion

Recruiting members and getting the word out about plans to organize a parent group requires schoolwide promotion. All parents, guardians and family members should be encouraged and feel welcomed to attend parent organization meetings. Utilize multiple strategies to ensure parents receive several invitations to meetings, including:

- Personal invitations – face to face
- Information fliers – handed out to parents during drop-off and pick-up times, etc.
- Reminders in parent newsletters
- School Messenger calls (coordinated through staff; a parent records the message)
- Schoology alerts (ask school staff to send message to parents inviting them to meetings)
- Meeting date announcements on social media (see below)
- Encourage students — with incentives — to bring parent or guardians to meetings
- Announce meeting dates and times on school campus signs
Utilizing Social Media

Social media is a wonderful resource to connect with parents throughout your school’s community. For guidance:

CPS Board Policy No. 9125 – Social Media Policy for CPS Employees

Cincinnati City School District Policies

The Cincinnati City School District (CPS or District) recognizes the importance of using social media as a communication and learning tool. This document provides the District’s guidelines regarding the use of online social media by its employees.

All staff members are expected to serve as positive ambassadors for CPS and appropriate role models for students. It is vital that staff maintain professionalism in their interactions with students and the community. Failure to communicate professionally when using social media could be a violation of Board policies – making District employees subject to disciplinary action.

What is Social Media?
Social media includes the various online Websites and tools that enable people to communicate easily over the Internet to share information and resources. Social media can include text, audio, video, images, podcasts and other multimedia communications. These Websites provide information and allow for interaction through user-generated content.

Social media is accessed through various forms of technology, including computers, notebooks, smartphones, tablets and other devices that allow Internet access.

Cincinnati Public Schools uses several social media tools, including:

Facebook (http://facebook.com/CincinnatiPublicSchools)
Twitter (http://twitter.com/IamCPS)
Blog (http://IamCPS.typepad.com)
YouTube (http://YouTube.com/IamCPS)

Social Media Account Authorization

District and Schools – District presence on any social media site, including school-related accounts (such as clubs, teams, field trips, courses and other affiliations with the District or a District school) must be authorized by a designee of the Public Affairs Department. Any sites, accounts or pages existing absent prior authorization will be subject to review, editing and/or removal.

To request permission for a District-related social media site, please use the Social Media Site Authorization Form. You must identify a Content Owner, or individual responsible for performing regular monitoring and maintenance of the social media account, and a responsible administrator (principal or lead teacher) assigned to the specific site. Please note that, for emergency purposes only, the District’s Public Affairs designee must also be listed as an administrator. However, the site, specifically, and all of its content will be the responsibility of the Content Owner and responsible administrator.

Foundation, PTA and Partner Sites – Authorized school Websites and social media accounts shall maintain a clear separation from the Website(s) of their school foundation, parent-teacher group or partner organizations. However, a link to the school foundation or parent-teacher group Websites or social media pages is permissible. The District maintains the right to take legal action against Websites that misuse its logos, school and District names, or violate any Board policies.

District Logo and Images – The use of the Cincinnati City School District logo(s) on a social media site must be approved by the Public Affairs Department. For approved logo use, please follow the CPS Logo Guidelines established by the Public Affairs Department.

General District Sites and Accounts – The District’s general social media sites, including the District’s blog, Facebook, Twitter and YouTube accounts, will be managed by the Public Affairs Department. Duplicate, unofficial sites shall be reported to the Office of General Counsel.
Sponsors and Advertising – All District and school-based social media sites must follow the advertising and sponsorship guidelines stated in CPS Board of Education Policy 9700. Advertising third-party events, for-profit ventures or activities unassociated with District or school business is strictly prohibited.

Content Disclaimer – Any approved official presence on social media sites outside of those created and monitored by the District’s Public Affairs Department or an authorized administrator shall include the following text:

*The views expressed on this site do not reflect the views of the Cincinnati City School District. This site contains user-created content which may not be endorsed by the District.*

Maintenance and Monitoring Responsibilities for Content Owners

Content Owners are responsible for monitoring and maintaining official presences on social media sites as follows:

1. When engaging in social media about the District or its schools, act as an ambassador for all Cincinnati Public Schools.

2. Content must conform to all applicable state and federal laws, as well as all District and Board policies and administrative procedures. This includes, but is not limited to, the COAST Agreement.

3. Content must be kept current and accurate, refreshed at least weekly, following Acceptable Internet Usage Standards set by Cincinnati Public Schools in Board Policy #7540.04.

4. Content must not violate copyright or intellectual property laws and the Content Owner must secure the expressed consent of all involved parties for the right to distribute or publish recordings, photos, images, videos, text, slideshow presentations, artwork or any other materials.

5. Before posting any photographs of students, Content Owners shall ensure that a Photo Permission Form has been completed for each student to be depicted. No student photographs shall be published for personal use, promotional use or any other non-school or District related purpose.

6. All postings and comments by users are monitored and responded to, as necessary, on a regular basis. Postings and comments of an inappropriate nature or containing information unrelated to official or District business should be deleted promptly.

7. There shall be no use of inappropriate language, ethnic slurs or personal insults of any kind.

8. When discussing the District or any of its schools, employees shall not provide sensitive or confidential information. Further, employees shall not publish or report on conversations that are private or internal, and must always follow federal guidelines regarding student privacy.

9. Employees shall identify themselves if commenting about the District and/or its schools or programs. If employees post content about the District or its schools or programs, language used must be in the first person (I or we) and be clear that the content being posting is coming from the individual and is not on behalf of the District.

10. Employees shall not pick fights or participate in online verbal altercations with users.

11. Employees should not allow online activities to interfere with job performance.

12. If there is doubt about content, employees shall not post it.

Online Media Inquiries

Should you be approached online by media representatives (including bloggers), please direct such inquiries to the Public Affairs Department at 513-363-0020. Additionally, if you are asked to provide comment on behalf of the District or its schools, direct such inquiries to the Public Affairs Department.
District Authorized v. Personal Social Media Guidelines

Although staff members enjoy free speech rights guaranteed by the First Amendment to the United States Constitution, certain types of communication, typically by virtue of their subject-matter connection to the District or its schools, may have ramifications for the author, the District or its schools.

When using technology owned by the District, all communication is governed by the Board’s Acceptable Use Policy (#7540.04), which will be enforced. Students and staff should not expect privacy in the contents of their personal files on the District’s Internet system or other District technology, including email. District technology may only be used for educational or District business purposes. Use for personal purposes, such as personal blogging, instant messaging, online shopping or gaming, is not allowed.

Use of personal technology (equipment that a staff member owns personally for personal use) may violate the District’s acceptable use policy if the District reasonably believes the conduct or speech will cause disruption to school activities or a staff member’s ability to perform his/her job duties.

Personal Internet usage should be unrelated to school. In certain circumstances, courts have held that personal online communications may be connected enough to the District to result in staff member discipline.

Personal Technology Staff Guidelines

1. Work/Personal Distinction – Staff members must maintain a clear distinction between their personal social media use and any District-related social media sites.

2. Limit On-Duty Use – Staff members must limit their personal technology use during duty hours. Use of personal technology should be limited to off-duty time and designated breaks.

3. Student Photographs – Absent parent permission for the particular purpose, staff members may not send, share or post pictures, text messages, emails or other material that personally identifies students in electronic or any other form of personal technology. Staff members may not use student images, emails or other personally identifying student information.

4. Professionalism – District employees must be mindful that any Internet content is ultimately accessible to the world. To avoid jeopardizing their professional effectiveness, employees are encouraged to familiarize themselves with privacy policies, settings and protections on any social networking Websites to which they choose to subscribe and be aware that information posted online, despite privacy protections, is easily and often reported to administrators or exposed to District students. Personal Internet usage should be unrelated to school. In certain circumstances, courts have held that personal online communications may be connected enough to the District to result in staff member discipline.

5. Personal Social Networking and Media Accounts – Before employees create or join an online social network, they should ask themselves whether they would be comfortable if a “friend” decided to send the information to their students, the students’ parents or their supervisor.

6. Friending District Students – Employees should not have online interactions with students on social networking sites outside of those forums dedicated to academic use. District employees’ social networking profiles and personal blogs should not be linked to District students’ online profiles.

7. Contacting Students After School Hours – When in doubt about contacting a student outside of school hours using either District-owned or personal technology, begin by contacting the student’s parent(s) or legal guardian. Students should only be contacted for district/school-related purposes.

Revised: 7-23-14
Fundraising

Fundraising should not be the primary focus of your parent organization. Instead, the group should focus on creating a culture that encourages strong relationships among parents, school staff and community members. When those well-developed partnerships are established, other families are more likely to support a parent-organization-led fundraiser. In a nutshell, lay a solid groundwork first.

It’s important to pick only one or two fundraising efforts per school year and to run them well.

- Share the purpose of the fundraiser with the school community; for example, explaining what the money will buy and how it will support student achievement.
- Share how much money was raised
- Remember to thank your supporters via cards, newsletters and/or school websites

Launching Your Group

The first meeting of your new parent organization should be an open gathering of anyone interested in supporting the school, with the goal of building relationships.

Keep it short, engaging and informative. Discuss the purpose of the proposed parent organization, suggest some proposed goals and encourage parents who came to invite others to join.

Election of officers should wait until a later meeting after the group has collected a starting group of members.

How to Run a Successful Meeting

Your goal is to create a welcoming atmosphere at your meeting place that will encourage people to come back — and bring others!

Some tips (from PTOToday.com):

- Post the agenda online before the meeting and have copies available.
- Arrange chairs and/or tables in a circle or square; avoid having leaders or officers sitting at a head table.
- Place 1 or 2 people at the entrance to serve as greeters.
- Everyone wears a name tag (newcomers and veteran members).
- Serve light refreshments (such as coffee, soft drinks or water, and a dessert or snack).
- Start and end on time; an hour or less is good length for a meeting.
- Introduce the officers, and, if the gathering is small, introduce everyone.
- An informal ice-breaker opens the meeting on a light note and puts people at ease. For example, ask the group, “What do you think is special about our school?” or “What is your favorite memory of elementary school?”
• Avoid “insider talk” and “alphabet soup.” Explain briefly the history of subjects and the meaning of initials (EMIS, IEP, etc.) under discussion so newcomers won’t feel left out.

**Basics of Robert’s Rules of Order**

Using parliamentary procedure to run meetings may sound complicated; but, with a little study of Robert’s Rules of Order, you’ll find it invaluable in keeping discussion on track. You don’t have to memorize the entire Rules of Order book; understanding a few key concepts will help a lot.

**Robert’s Rules of Order helps groups:** (from PTOToday.com)
- Conduct business one item at a time. Jumping around from item to item can be confusing, and it generally delays progress.
- Let committees do their work. General meetings are to resolve major issues. Save everybody’s time by letting committees deal with smaller details.
- Stop crosstalk. Require all speakers to address the meeting’s leader. This helps the leader keep control and ensures that everyone hears the discussion.
- Limit discussion to the topic at hand. Keep things focused, and ask speakers to deal only with the current topic.
- Cut off discussion when it becomes redundant. For controversial issues, setting a time limit for each speaker can help. When discussion becomes circular, summarize the points on each side and ask for anything new — or shut off discussion by calling for a motion.

**Robert’s Rules 101** (one page summary):

**Robert’s Rules – What You Should Know:**

**Tips for handling difficult situations in meetings:**
www.ptotoday.com/pto-today-articles/article/1310-eliminate-a-negative-vibe-at-pto-meetings

**Taking and Approval of Minutes**

Minutes are the official record of what happens at a meeting, including summaries of the group’s discussion and the outcome of votes (passed, defeated, tabled).

The secretary (or someone else if secretary is absent) takes notes during the meeting, by hand or on a laptop, or recorded. Before the next meeting, the secretary compiles the notes into the official minutes to be approved by the executive board at the next meeting. Prior to the next meeting, the secretary shares the minutes with the full board to check for omissions or corrections.

**How to Take Meeting Minutes:** www.ptotoday.com/pto-today-articles/article/1029-how-to-take-meeting-minutes
Linking Family Engagement to Learning

Connecting Efforts to Grade-Level Expectations, Graduation Requirements, Etc.

At Cincinnati Public Schools, we “prepare students for life,” so we encourage each parent organization to embrace that mission. The ultimate goal of parent organizations within CPS is to increase parent and family awareness and ownership of grade-level student expectations.

CPS is focused on these outcomes for the 2018-19 school year:

- Kindergarten Readiness
- Literacy (grades 3rd / 6th / 9th)
- Math (grades 3rd / 6th / {9th – Algebra})
- ACT College Admission Test
- High School Advanced Placement (AP) Exams
- Increasing graduation rate
- Acceptance into Career Pathways — Enrolled, Enlisted, Employed

Parent organization members don’t have to be experts in these areas. They can link with district administrators and community partners to provide parents with professional development sessions.

When each parent becomes an active partner in their child’s education, student success will be uplifted.

CPS’ Family Engagement Pillars

Cincinnati Public Schools acknowledges that parent and family engagement have direct impacts on students’ success. Thus, we ensure that all family engagement strategies are linked to learning and meet CPS’ Family Engagement Pillars:

- We uplift family voice in CPS decision making.
- We partner for student success.
- We empower lifelong advocates.

CPS Board Policy No. 9140 – Parent - Family Engagement

Cincinnati City School District Policies

Parent/family engagement is an important part of the educational process. A home/school partnership and greater involvement of families in the education of their children generally result in higher academic achievement, improved student behavior, and reduced absenteeism. All families and support systems of students enrolled in the district are encouraged to take an active role in the education of their children.

The District recognizes multiple levels of family engagement, some of which happens and is visible in the school building and still other happens at home or in the community. The district believes each level of
family engagement is valuable and important to student growth and the District’s pursuit of equity and excellence in education (Policy 2255, Equity and Excellence in Education).

Therefore, every school will implement and sustain opportunities for parents/families to be engaged. Recognizing that a family’s opportunity for engagement varies depending on a number of factors, schools will design both in and out of school engagement opportunities that allow families to participate in their children’s education including:

A. Encourage strong family / school partnerships
B. Provide consistent and effective communications among parents/families, teachers, and school staff including direct communication regarding students, academics, behavior and attendance
C. Offer parents/families ways to assist and encourage their children to do their best
D. Offer ways parents/families can support classroom learning activities in and out of school
E. Involve parents/families in the design, operation, and evaluation of the educational day and program
F. Provide sufficient and timely information concerning the status and progress of their children’s education

Suggested formal or in-school parent/family opportunities include:

A. Parent representation on the Local School Decision Making Committee
B. Parent / Teacher Conferences
C. Parent Organizations
D. Parent Professional Development
E. Local or Districtwide Parent Councils and advisory groups for specific purposes
F. Booster Clubs
G. Attendance at school functions
H. Volunteering during the school day
I. Social and Advisory Groups

Every school shall have at least one parent organization. These organizations may look different at each school, as they will be designed to fit the specific needs of that school’s parent community. At the same time, the district encourages parent organizations to collaborate across schools for sharing of information and best practices. The formation of the parent organization will be included in the School Improvement Plan.

Consideration must be given to English as a Second Language families and the special needs of parents who are physically challenged or sensory impaired to ensure that they also have access to information about their children’s education.

Revised: 4-19-2018

CPS’ Family Engagement Plan

A committee of parents, CPS staff and community members created a detailed, comprehensive Family Engagement Plan for Cincinnati Public Schools, based on six engagement standards established by the National PTA.

- Welcoming all families into the school community.
- Communicating effectively.
- Supporting student success.
- Speaking up for every child.
- Sharing power.
- Collaborating with community.
Governance

In Cincinnati Public Schools, parent organizations are known as Non-School Organizations (NSOs) and are governed by Board policy.

CPS Board Policy No. 9212 – Non-School Organization (NSO)

School Support Organizations are independent from the District and the Board of Education, but exist exclusively for the benefit of students. The Auditor of State refers to these groups as Non-School Organizations (NSOs) due to them being distinct and separate from the school district. Cincinnati Public Schools (CPS) has clearly identified groups that are recognized as NSOs. Examples of NSOs currently in operation throughout the district include: parent/teacher organizations and associations, booster clubs, alumni groups, social committees, foundations and “friends of”. The Board has adopted the School Support Organization policy and established parameters within which these groups should operate. This policy specifies that the:

1. Activities of these groups do not involve public funds,
2. Groups clearly distinguish themselves from the CPS school district in all activities,
3. Guidelines and procedures related to the use of school grounds, school district personnel, and students in fund raising activities of the groups are strictly followed,
4. Purchases by the groups are not represented as school district expenditures and do not use the identification numbers of the school district (Tax I.D. numbers, sales tax exemption forms, school district purchase orders, etc.),
5. Donations to the school district, in the form of cash or merchandise by such groups, only be accepted by board resolution that is reflected in the Treasurer’s Report, and
6. Checks made payable to the school district or a school district building should be deposited into the applicable fund within 24 hours of receipt.

According to Ohio Revised Code Section 3313.811, the State Board of Education has established the following guidelines to be used by the board of education in determining the appropriateness of the sale of items by organizations other than a school district.

1. The organization has a purpose which will benefit the school district and its students.
2. The organization’s planned activities are clearly in the best interest of the school district and its students.
3. The organization has submitted the following information and assurances:
   a. A statement noting the purpose of the organization, including but not limited to:
      i. Organization name,
      ii. Stated purpose, which must benefit district students,
      iii. Provisions for student involvement,
      iv. Names and terms of officers, along with the procedures for elections, and
      v. There will be at a minimum a president, treasurer and secretary elected.
   b. Financial accountability assurances that the organization:
      i. Utilizes a proper bookkeeping procedure by recording revenues & expenditures, review of monthly bank statement by someone without check writing authority, checks require dual signatures, etc.
      ii. Has identified persons who have financial responsibilities,
      iii. Will not commingle funds with student activities accounts,
iv. Will use funds within the framework of the purpose of the organization whereby funds will not be considered public monies, and

v. Will guarantee that at least seventy percent of funds collected will be spent on student activities.

c. Use of facility assurances that the organization:

i. Will obtain permission from the principal to use school property and obtain a permit if needed,

ii. Will have a faculty member or principal on the advisory board as a sponsor,

iii. Will use teacher volunteers, students, or members to conduct activities only if approved by the superintendent or his or her designee, and

iv. Will be willing to pay for any or all additional expenses incurred by the activity.

4. District employees many not be compensated by NSOs for school-sponsored activities; specifically, school employees compensated by the Board of Education are prohibited from receiving compensation for the same services from any other source, including a booster group or other support organization. District employees are prohibited from serving as a signatory on NSO checking or savings accounts.

5. Any NSOs desiring to use the District's name, logo, trademarks, copyrights, etc. must first obtain approval from the Superintendent or his/her designee. Such approval shall also be required for the NSO's use of the District's intellectual property and good will on social media websites.

6. Student participation on athletic teams or in co-curricular activities is completely independent of any fund-raising activities, and students cannot be denied participation on athletic teams or in co-curricular activities based solely on participation in fund-raising activities.

7. Schools gratefully accept support from these organizations, but they are bound to a one-way flow policy in the sense that, although they may accept and benefit from such support, they may not return the favor by making payments to, making purchases for, or materially enriching a NSO by otherwise using district resources.

**NSO Fundraising Activities Permitted (no student participation)**

A NSO, with the approval of the Principal, may conduct fundraising projects such as the following:

1. The school is used as a distribution center to send materials (candy, wrapping paper, a catalog to sell magazines, raffle tickets) home for sales by parents to friends and neighbors. Students are not involved in the process at all, including but not limited to, the sales, neither as sellers nor buyers. The NSO must provide its own volunteers to implement the distribution, as it is not entitled to—nor is the district permitted to provide—the publicly financed labor of school district employees. All the revenue is handled, and all bills paid, by the NSO. It is clearly a fundraiser of the NSO.

2. A building permit to use the school building is obtained by the NSO outside school-day instructional hours, for a fundraising social event—such as a fundraising dinner, or a benefit concert. In this case, because the permit has been issued to the NSO, and because the event is held outside instructional hours—it is clear to auditors and to other concerned parties that the outside organization, not the school, is sponsoring the event, handling the revenues, and paying the bills. Evening and weekend events for which a building permit is issued are, by definition, functions of the NSO. Building permits can be obtained from Facilities.

**Fundraising Activities Which Must be Handled Through Student Activity Funds- SAF (student participation)**
1. Bake sales, and sales of candy, popcorn, or inexpensive novelties, for example — sold to students during the school day, must be sponsored by the school (through an SAF project), as non-school organizations are prohibited from sponsoring such sales.

2. The students are provided with items — for example, candy, wrapping paper, magazine subscription forms, raffle tickets — and asked to sell them to family, friends, and neighbors. This kind of fundraiser must also be sponsored by the school (through an SAF project), as non-school organizations are prohibited from sponsoring such sales. This is a school fundraiser, with the funds to be deposited into and expended out of the given schools student activity fund account.

Revised: 06/21/2018

Affiliate With A National Group — Or Stay Independent

Each parent organization decides whether to function independently or to affiliate with a national group, after discussion with its membership.

The National Parent Teacher Association (PTA) (and its sister group, Parent Teacher Student Association - PTSA), was founded in 1897 and operates at the school level, with links to district, state and national chapters. Affiliation as a PTA provides additional resources and guidance for a school’s parent group, and requires payment of joining fees and/or membership dues.

Information: www.pta.org

There also are PTOs (Parent Teacher Organizations), which is a generic term for an independent, non-PTA parent group. An umbrella group called PTO Today began in 1999 and provides many of the same resources as the PTA, at no cost for the basic level.

Information:
- www.ptotoday.com

Why Bylaws Are Important

Bylaws are a broad range of rules that govern how a group operates and is organized. Every parent group should have bylaws that are available for all interested parents to read. Bylaws cover topics such as the makeup of an executive board, how officers are elected, how meetings are run and membership requirements.

Four reasons to adopt bylaws (source: National PTA):

- **Consistency** — Rules and policies that are documented in bylaws can be applied consistently so that emotions and personalities do not get involved.
• **Efficiency** — Bylaws include procedures for decision making so your parent organization can conduct its business according to the rules and as efficiently as possible.

• **Protection** — Strong bylaws help protect the group from internal conflict, financial risk and the tendency to drift from its core mission.

• **Legitimacy** — A strong set of bylaws is a sign that the parent organization takes itself seriously. Bylaws give the members assurance of the group’s mission, structure and policies. And, the IRS requires bylaws if your parent organization files for 501(c)(3) (non-profit) status.

Information: How to write parent organization bylaws, with sample bylaws –

www.ptotoday.com/pto-today-articles/article/968-how-to-write-pto-bylaws

**Descriptions of Officer’s Roles**

Parent organizations should elect a **president**, **vice president**, **secretary** (can be two positions: recording and corresponding) and **treasurer** to handle the group’s leadership responsibilities. All officers attend the general and executive board meetings, and participate in discussion and decision making.

**Typical Officers’ Roles**

**President**

- Prepares for and leads general meetings and executive board meetings
- Meets regularly with the principal, serves as the group’s primary contact and represents the group
- Serves as an ex-officio member of all committees
- Reviews the treasurer’s monthly report

**Vice President**

- Assists the president
- Performs the duties of the president if president absent or unable to serve
- Participates in executive board meetings
- Oversees committees, acting as liaison between committee chairpeople and the executive board

**Secretary**

- Prepares meeting agendas
- Records minutes (details of what occurred) of all general and executive board meetings
- Maintains file of all approved minutes, agendas and materials distributed
- Serves as the group’s parliamentarian and bylaws expert
- Manages communications and marketing for the group, including but not limited to newsletters, email broadcasts, website, social media and school bulletin board
Treasurer

- Posts financial transactions
- Creates monthly treasurer’s reports
- Balances the group’s checkbook
- Writes checks as needed (two signatures, proper paperwork required)
- Deposits funds as needed
- Preserves financial records
- Leads annual budget development process
- Facilitates annual audit of group’s financial records

Process for Obtaining Non-Profit Status

Many parent organizations apply for non-profit status. Being a non-profit organization qualifies the organization as a public charity under the Internal Revenue Code 501(c)(3). This means the organization does not collect taxes or pay income tax, and the businesses that you ask for donations can claim the donations on their income tax returns to the Internal Revenue Service.

To become a non-profit, the parent organization must submit an application to the IRS, seeking a 501c(3) non-profit status. The cost to apply is about $500. After approval, the IRS issues the organization an EIN (Employer Identification Number).

Note: When the Ohio PTA charters a parent organization to become a PTA, there is no cost to receive non-profit status. Ohio PTA applies for the organization’s non-profit status and obtains the EIN for the organization. This is a big benefit to becoming a PTA.

Succession Planning

Grooming Future Parent Leaders

Making sure your parent organization continues to operate smoothly as leadership changes is vital; the organization’s work must be a group effort that doesn’t dissolve when members leave or step down.

Parent organizations are transient groups, with parents moving on as their children move up from grade schools and graduate — making room for incoming parents who may be new to participating in an organization.

Veteran parent organizations know there are ways to minimize the turmoil that sometimes comes with the annual changing of leadership.

Eight Tips For Improving Transition (from PTOToday.com)

- **Share the load** — install co-presidents and co-committee chairs to staggered terms for on-the-job learning.
- **Plan for your successor** — from day one, start thinking about what would help the next leader, such as what notes to save, etc.
• **Recruit, recruit, recruit** — mention early and often that good candidates are needed for next year

• **Set term limits** — put in the bylaws that officers may serve specific number of years, so officers don’t stay too long.

• **Create a position for past presidents** — such as president-emeritus or chairperson on special projects or committees, to keep the person involved and accessible to newcomers looking for an experienced voice.

• **Have a “brain dump”** — outgoing officers should talk to their successors to ensure a smooth transfer of responsibility.

• **Keep it in perspective** — don’t lose sight of the group’s purpose – to help the school and the children; try to keep disputes from turning personal.

• **Seek professional help** — when conflicts rise to an uncomfortable level, outside help is needed to negotiate a solution – from the principal, another board member, or a mediator such as the United Way or another non-profit support group.

A special “thank you” to our team members for their time and effort in creating this Parent Organization Tool Kit:

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- **Rick Wolfe** – Parker Woods Montessori School, parent
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**September 2018**