

# As Easy As...

# 1-2-3!

# 1-

## Set your goals for the coming year!

### Once you and your board are elected...

- 1. Call a board-elect meeting.** This can be a getting-to-know-you social! Or it can be a brainstorming meeting! Or it can be a real organizational meeting, complete with an agenda!
- 2. Ask your board to think about PTA goals for the coming year. When you meet work with your board members to set goals. Remember:**
  - Goals are guidelines...directions for your PTA to move forward.
  - Goals should be written down! And reviewed & evaluated throughout the year.
  - Goals should be written with input from your board members; presidents do not "dictate" which goals the PTA sets.
  - Goals should be relevant, related to the PTA purposes & objectives.
  - Goals should be attainable...does your PTA have the time, budget, volunteer base to attain your goals?
- 3. For easy goal writing, follow this formula. Ask & answer:**
  - Who are you?
  - Who will you provide for?
  - What do you want as a result?
  - How will you get that result?

The \_\_\_\_\_ PTA  
**will** (action words to do what for whom)  
**to** (action word & achieve what result)  
**by** (or at) (how you will achieve this result)

*Example:*

**The Sunshine PTA**  
**will** host three family nights for our students and their families,  
**to** help families feel welcome and comfortable at our school, and to experience the academic environment of Sunshine Elementary,  
**at** a Family Science night in October, a Family Art night in February and a Family Math night in May.

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# 2

## **Plan your program to reflect your goals!**

**With goals in hand, the board-elect should plan the annual program.**

1. **Use your goals as a roadmap to your programs.** If your board has identified its goals, use each goal as a compass to point you in the direction of a program.
2. **Bring your calendars.** Bring a blank calendar for each of the board members, or ask them to bring their personal calendars. Also, bring a copy of a holiday/non-school day calendar from your school district, and ask your principal or administrator to bring a copy of the school's calendar for the coming year. Do not conflict with activities planned by feeder schools or your school district! Respect the religious holidays of all faith-based groups. Set tentative dates for the programs and events you plan.
3. **Use your goals as a roadmap to your programs.** If your board has identified its goals, use each goal as a compass to point you in the direction of a program.
4. **EVERYONE—Bring ideas!** Frontload your board by asking them to think of ideas BEFORE the meeting. Brainstorming meetings run much smoother and accomplish much more when participants are given time to think about what they would like to do in their area of stewardship. Ask program "experts" to join in the discussion, i.e. if you are working on a reading program, ask the librarian to join the meeting. If your PTA has done a survey of members, use the results in your planning. Don't be afraid of change; try fresh ideas!
5. **Include your principal or administrator.** The administrator might also have ideas of focus; for example, perhaps his/her focus for the coming year is math. Your PTA could partner with the administrator to host programs which will emphasize this focus area.
6. **Program idea examples** could include classroom funds, field trips, outdoor education, technology funds, enrichment programs, assemblies, playground equipment, safety, parent education, outreach etc.
7. **Develop a committee.** Once you have a program in mind, identify a committee and a committee chairman. A committee can have as few as 3 members and as many members as you wish. Look for members with special talents. Reach out by including a committee member from all populations in your school. Include teachers & staff in the committee.
8. **Constantly evaluate.** As the school year passes, constantly evaluate the value of your program, how it is running and what you could do to make improvements. "Reroute" your goals, if necessary

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## 3 With your goals and calendared program in hand, plan your budget!

1. **The budget committee is responsible for the budget.** This committee includes the financial officers (past and present), president and/or president-elect, the principal and others, as appointed by the president.
2. **Invite your officers and chairman to submit suggestions.** During the goal setting and program planning meetings, a plan for the year has been established. Officers and chairmen can give the budget committee details of these plans.
3. **Bring some figures!** With the help of the board and the budget committee, probable costs can be determined. Ask the board for detailed costs of the proposed programs. Review past budgets, income and expenditures. Refer to the Insurance and Loss Prevention Guide for approved activities.
4. **Raising the money.** Once you have established the programs that meet your goals, the next step is to develop the fundraiser that will pay for these programs. Review past fundraisers. Was the fundraiser a fit for your school? Did it bring in enough income? How many volunteer hours did it take to complete? Is it time to try a different fundraiser?
5. **Put your money where your mouth is!** Once a proposed budget is developed, go back and match up your goals with your budget. For example, if your PTA goal is to support advocacy efforts, make sure that your budget reflects that goal! If increasing membership is important, make sure that your budget allocates enough money for the theme presentation and incentive plan. Your budget should reflect your goals!
6. **Budgets should be program-driven *not* revenue driven!** PTA is not a fundraising machine. We are a professional volunteer organization committed to the well being of all children.
7. **Don't forget to budget for PTA business expenses, too.** It is important to understand that PTA has other expenses that are necessary to carry on the business of PTA.
8. **Remember the 3 to 1 rule!** There should be 3 non-fundraising programs geared to meet your goals for each 1 fundraiser.
9. **Take it to the people!** Remember—the budget must be approved by the PTA association. A budget should be revised mid-year. Your board cannot encumber future boards.