



## **Financial Management**

**Working with your PTO:**

**Improving Oversight While Maintaining Parent Engagement**

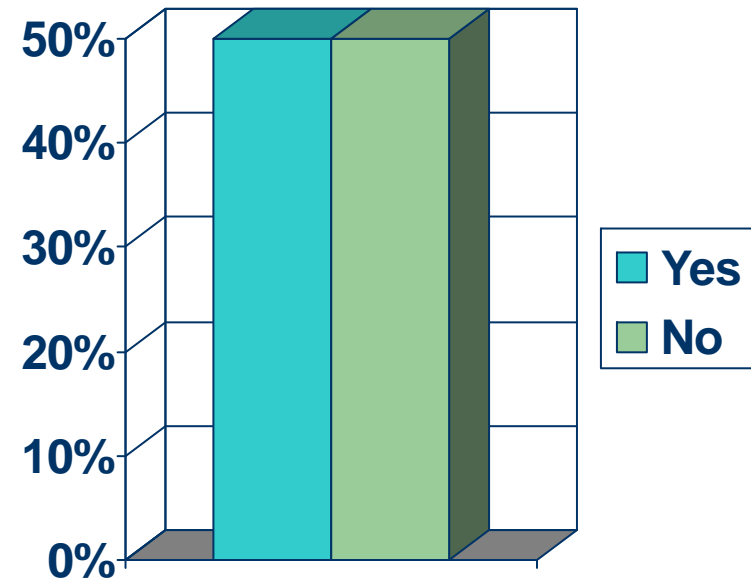
**Stephane Acel, Facilitator  
September 20, 2006 at 1 pm Eastern Time**

# Agenda

- **Welcome**
- **Share and Discuss Selected Survey Results**
- **Summarize and Discuss Article**
  - Principles to keep in mind
  - Recommendations
- **Voice from the Field: Practices in Action**
  - Gary Wingens, Immediate Past President, Solomon Schechter Day School of Essex and Union
- **Reflection**
- **Next Steps**

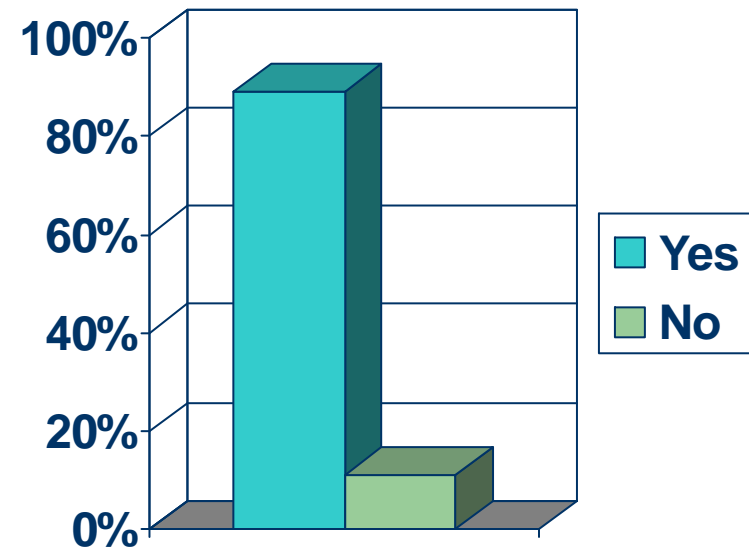
# Survey Results (18 participants)

1. Do your school board, administration, and PTO experience issues relating to role definition and role clarity?



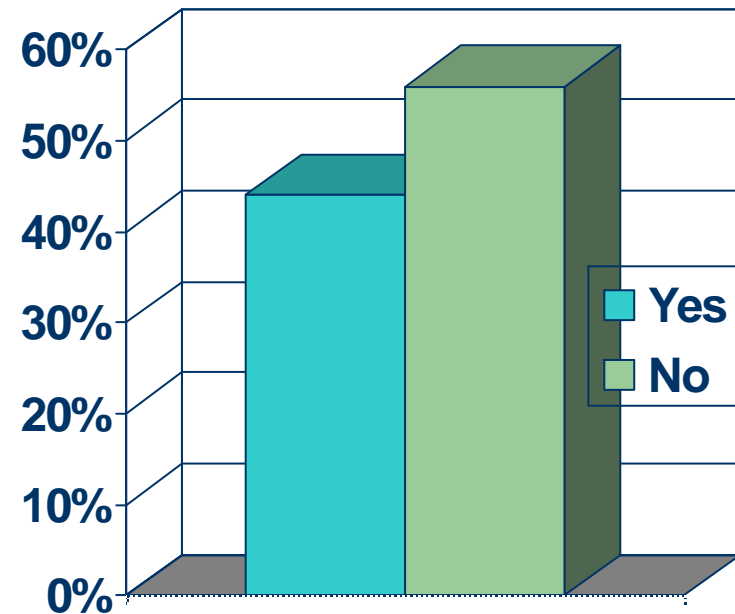
# Survey Results

2. Does your board contain representation from your PTO?



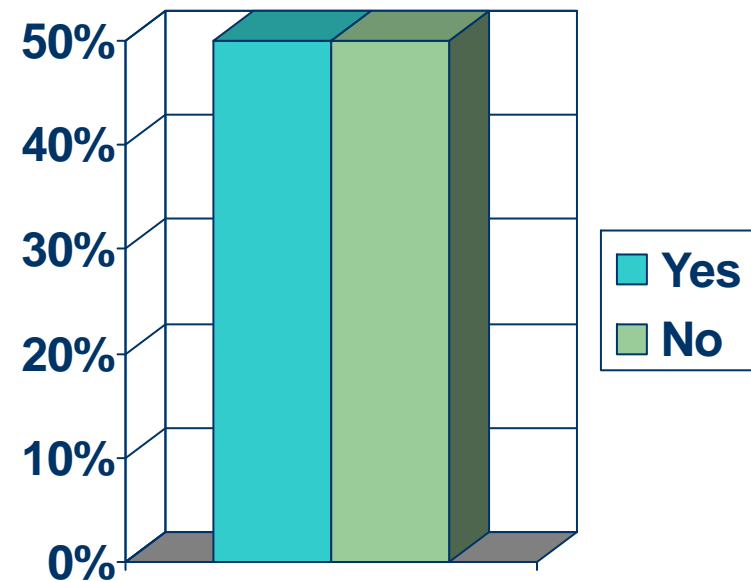
# Survey Results

3. Is PTO fundraising coordinated with the development office and approved by the board?



# Survey Results

4. Do PTO financial activities flow through the business office's books?



# Article: Parent Associations For Independent Schools

By Author: Patrick F. Bassett, NAIS

<http://www.isacs.org/resources/monographs/library.asp?id=326&category=16&action=show>

# Principles to Keep in Mind

- Independent schools should seek partnerships with parents.
- The role of parent associations is to work with the administration to build those partnerships.
- **Adversarial relationships have no place in independent schools.**
- Parent associations exist at the pleasure of the board.

# Discussion

- How have your schools defined the parent association's role?
- What policies or practices are in place to prevent adversarial relationships?
- Does your parent association serve at the board's pleasure?

# Principles to Keep in Mind

- Independent schools eschew representative democracy. Some noteworthy practices:
  - boards should focus on the future
  - administration functions as a court of last resort to resolve problems or conflicts (with no “appeals” to the board)
  - a parent association should commit to their specific role of advancing the cause of the school and contributing to an overall positive climate

# Discussion

- Do parent issues spill over from the administration to the board?
- Whose cause is your parent organization advancing?

# Recommendations

- Appoint a parent association member to the board to serve as board's communication link back to the parent association.
- Fundraising by the association must be coordinated with development office and approved by the board.
- The parent association should use school's tax i.d. number and their financial activities should be recorded in school's books.
- Fundraising and expenses beyond a minimum threshold (e.g. \$250) must be authorized by the school.

# Discussion

- What recommendations would you make?
- What should you avoid?
- What is at stake if the parent organization does not operate under the school's tax i.d. number and through the school's books?

# Voice From The Field: Practices in Action

## **Gary Wingens, Immediate Past President, Solomon Schechter Day School of Essex and Union**

- As PTO Treasurer, he was a CPA and understood the implications from the audit management letter.
- The PTO, under his leadership, started keeping financial records in Quickbooks, allowing for easy transfer to the school business office.

# Reflection

- How similar is your school's situation to what was just described?
- How is your school different?
- Are there any lessons here for you to take back?

# Next Steps

- What will you do?
- What do you need in order to move forward?
- How can you share outcomes with the group?
- Please continue the discussion on the listserv. A sample set of the **Parent Association by-laws** will be shared as will the SSDS of Essex and Union **Parents' Association brochure**.

## Next Call

- **"Implementing a Salary Broad Banding Program in Your School."** This is part two of the discussion that we started last spring with Terry Moore from ISM. This time Terry will lead a discussion on how to integrate broad banding into schools. Notes from last spring's call will be distributed prior to the call which will take place **Thursday, October 26 at 3 pm Eastern.**