

## Planning the PTA Year

---



### Overview

---

A plan, including goals and objectives, for the year should be written and shared with the PTA board and principal. School staff should be included throughout the planning process.

Preplanning is very important to establish income and expenses for the year. The written plan of overall goals and specific objectives should be used by the finance committee in developing the budget. Planning also should include an evaluation mechanism for ongoing measurement of your PTA's progress and successes.

Revisit your goals throughout the year and check to see if you have attained them, or what has changed.



### Goal Planning Step by Step

---

1. Determine the purpose of PTA in your school (remember to use the PTA mission as a guide: be a relevant resource for families and communities, and be a strong advocate for the education and well-being of every child).
2. Review past and current activities of the PTA (did past activities meet the needs and goals of the association?).
3. List all available resources for the PTA (funding, membership, local assistance from other organizations and agencies, facilities, etc.).
4. Gather input from parents, teachers, and administrators on school and community needs through surveys and discussions.
5. List the types of activities for consideration.
6. Prioritize ideas and select the two or three that best meet the board's goals.
7. Develop a calendar for activities and assign committee responsibilities.
8. Evaluate the activities using measurable outcomes.



CHECKLIST

### Objectives Checklist

---

Your plan objectives should follow S.M.A.R.T. guidelines (specific, measurable, attainable and agreeable, relevant, time frame).

#### Specific

- Is the main intent stated?
- Is the main intent specific?

#### Measurable

- Is the outcome measurable?
- Are you able to determine if the outcome can be achieved?

#### Attainable and agreeable

- Is the goal achievable during the time period established?
- Is the goal satisfying, or agreeable, for all people involved?
- Is the goal in line with the mission and purpose of PTA?

#### Relevant

- Is the main intent relevant to the objectives of the group?
- Is the goal applicable to the unit?

#### Time frame

- Is there a time frame within which the goal must be met?
- When will the goal be met?



### Goal Planning Guide

Fill in the blanks and draft some ideas for your PTA's year. Page 37 has a more formal "plan of work" template, but you may want to use this page to brainstorm first.

Objective	Plan for meeting this objective and time frame
Encourage parents to be involved in the school.	
Inform parents about issues that affect student success.	
Participate in the state PTA convention or other state PTA-sponsored events.	
Increase membership by 5 percent.	



### Frequently Asked Questions about Planning and Goal Setting

---

#### What is a plan of work?

A plan of work lists the goals of your PTA and the expected means by which those goals will be reached. The plan of work guides the unit's activities for any given fiscal year. Committee chairs also prepare a plan of work (which must be approved by the executive committee or board) for their committees.

#### How is a plan of work put together?

Survey members on their perceptions of the school's most urgent needs. Once identified, these needs should be grouped and prioritized. The highest priorities should guide you in setting the PTA goals for the year. Establish ways the PTA can best help to meet those needs and estimate how much money your PTA will need to reach its goals, then identify sources of funds and create a budget.

On the following page is an example of a committee plan of work template recommended by Texas PTA.



### Planning Resources

---

Take the Planning and Goal Setting e-learning course at [www.pta.org/e-learning](http://www.pta.org/e-learning).

**Plan of Work**

Officer/Chair Name: \_\_\_\_\_  
 (Nombre de Oficial/Presidente de Junta)

Position: \_\_\_\_\_ Year: \_\_\_\_\_  
 (Posición) (Año)

Responsibilities/Duties: (Responsabilidades)			
Goal: (Meta)			
Specific Action Steps (Proceso Especifico de Acción)	Start Date (Fecha de Empiezo)	Completion Date (Fecha de Terminación)	
Budget: (Presupuesto)			
Resources: (Recursos)			
Evaluation Process: (Proceso de Evaluación)			
Committee Members: (Miembros del Comité)			