

Goal Setting Tips for PTAs

WHY? – Goals provide direction, purpose and accountability. They roadmap a destination and give focus for individuals as well as for the team. Goals help the group and individuals to be more efficient and more effective as PTA leaders.

WHO? – The widest possible population equals ownership. This involves the whole PTA team. Get input from those who will do the work and those who will be affected.

WHAT? – A goal is a destination that helps to define the role of your PTA. It should answer the question of ‘who you are’ and ‘what you want’ to accomplish. It is a written, relevant and observable statement of a desired end. Goals reflect the mission of a PTA and give common focus to the PTA’s efforts.

Brainstorming – How To:

- Use facilitator from outside your group
- Everyone participates, one at a time
- Propose 1 item each turn, may pass
- Recorder records each statement
- No wrong answers, no debate
- Work until all have passed or time is up
- Each can advocate for or against an item
- Facilitator helps to find common threads
- Group can rank items with value of 1-3
- Highest ranked item is the consensus

Goal Setting – Multi-Step Process

- 1. Determine PTA's Role**
What do we want to do? Evaluate:
 - Past PTA Actions
 - Present PTA Needs
 - Future PTA Gains
- 2. Identify School Community's Needs**
How can we fill the role we identified to meet the needs?
 - Do needs assessments /surveys
- 3. Brainstorm Ideas**
What might work best?
 - Prioritize ideas to reach consensus
 - Review assets
- 4. Write A Goal Statement**
 - Define your goal
- 5. Set Objectives**
 - Identify specific actions needed
- 6. Develop An Action Plan**
 - Determine priorities and assets
 - Identify steps, resources and timeline
- 7. Monitor And Evaluate Goals**
 - At mid-term and end of term

Goal Setting Tips for PTAs

WRITING GOAL STATEMENTS

- Write statement to define goal
- Who, What, Why, How and When?
- Use 'SMART Goal' method for measuring how viable your goal is

Example: Our PTA will develop and implement strategies to jumpstart PTA involvement by communicating more effectively throughout the school year.

SETTING OBJECTIVES

- Define objectives needed for goal
- Show how you will reach your goal
- Identify specific actions
- Be brief, concise and clear

*Example – Improve Communications:
 Our PTA will publicize all PTA programs and activities.*

DEVELOPING ACTION PLANS

- Explain steps and resources needed to meet the objective(s)
- Relate Action Plan to objectives
- Identify:
 - What action will take place?
 - Who is assigned to do the tasks?
 - What materials are needed?
 - When will actions happen?
 - How will progress reports be made?

*Example – Improve Communications:
 The communications chairman will use email blasts, website postings and newsletters each month to publicize PTA programs and activities.*

DOING EVALUATIONS

- Determine method of evaluation
- Do evaluations at mid-term and end of term
- Decide who oversees the evaluation
- Sample questions for evaluating the effectiveness of a goal:
 - Does anything need to be changed?
 - Was the goal met?
 - Did it implement one of the Purposes of PTA?
 - Did it relate to PTA's mission?
 - Did it meet the community's needs?
 - Did it involve members, students or teachers?
 - Was it interesting, beneficial or helpful for members, students or teachers?
 - Did it give us any useful information?
- Review and implement changes to goal as needed

What are SMART Goals?

SPECIFIC

- What will be achieved?

MEASURABLE

- How will you know if your goal is reached?

ACTION PLAN

- What actions will be taken to achieve your goal?

REALISTIC

- Can you achieve the goal?

TIMEFRAME

- When will the goal be reached?

Worksheet – Goal Setting: Your GPS for Success

• PTA Goals – Purpose and Value

• Planning the PTA Year

• How to Set Goals

• Brainstorming – How can we jumpstart PTA involvement?

Worksheet – Goal Setting: Your GPS for Success

• Goal Setting Process

• How to Write a PTA Goal Statement

• How to Develop Action Plans

• How to Evaluate a PTA Goal

HOW TO – WRITING A GOAL STATEMENT

WHO ...	The _____ PTA
WHAT ...	will _____ (action word or two stating what PTA will do)
WHY ...	to _____ (action word and achieve what result)
HOW ...	by _____ (how PTA will achieve this result)
WHEN ...	_____ (when PTA will achieve this result)

Strategy Chart

- **Stated Goal or Objective?** Improve Communications

Resources	Allies & Opponents	Targets	Tactics (Activities)	Timeline
<input type="checkbox"/> School District Administrators <input type="checkbox"/> Volunteer interest & expertise <input type="checkbox"/> Print shop discount <input type="checkbox"/> Community organizations <input type="checkbox"/> Local businesses	Allies: <input type="checkbox"/> Parents <input type="checkbox"/> Principal <input type="checkbox"/> Teachers <input type="checkbox"/> Students <input type="checkbox"/> Community organizations	<input type="checkbox"/> Parents <input type="checkbox"/> Students <input type="checkbox"/> Teachers <input type="checkbox"/> Local Businesses <input type="checkbox"/> School District <input type="checkbox"/> Local Newspaper	<input type="checkbox"/> Monthly Newsletter <input type="checkbox"/> PTA Website <input type="checkbox"/> Telephone Tree <input type="checkbox"/> Text messages <input type="checkbox"/> School Marquee <input type="checkbox"/> E-news/ email blasts <input type="checkbox"/> Facebook <input type="checkbox"/> Twitter <input type="checkbox"/> Meet with Reporters	<input type="checkbox"/> 1 st of each month <input type="checkbox"/> Update 2X/ month <input type="checkbox"/> Before meetings/ events <input type="checkbox"/> Before meetings/ events <input type="checkbox"/> Change weekly <input type="checkbox"/> Twice a month <input type="checkbox"/> Update weekly <input type="checkbox"/> Before meetings/ events <input type="checkbox"/> Before 1 st PTA meeting, for events & end of the year

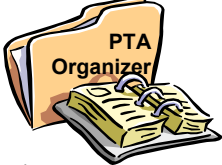








Strategy Chart

- **Stated Goal or Objective?** _____

Resources	Allies & Opponents	Targets	Tactics (Activities)	Timeline

SAMPLE

2011-2012 PTA Unit Calendar of Events and Deadlines

<p style="text-align: center;">June</p> <p>___ President-elect with Principal *Summer plans for PTA *Continue to build good relationship</p> <p>Over summer ... *Attend PTA training *Set goals with board *Hold casual committee, planning meetings *Read bylaws & Toolkit *Pass on files & procedure books *Write your newsletter articles *Organize your files and papers</p> 	<p style="text-align: center;">July</p> <p>1 Take office 1 Prepare audit - outgoing auditor 1 Change signature cards at bank ___ Executive board meeting-___am/pm *Decide on goals & review draft calendar *Present budget to board for review *Give copies of bylaws to board</p> 	<p style="text-align: center;">September</p> <p>___ First Day of School *Membership Kick-off ___ Executive board meeting- ___am/pm *Appoint bylaws/standing rules review committee ___ Association Meeting- ___am/pm *Adopt audit *Approve proposed programs/projects *Approve updated budget *Approve fundraisers</p>  <p>*Submit member per capita dues monthly </p>
<p style="text-align: center;">October</p> <p>___ Remit member per capita dues ___ Start the Art Week ___ Kick-off Reflections</p> <p>___ Executive board meeting - ___am/pm ___ Red Ribbon Week</p>  	<p style="text-align: center;">August</p> <p>___ Executive board meeting - ___am/pm *Present audit to board *Final board approval of calendar ___ First Day of School</p>  <p style="text-align: center;">November</p> <p>___ PTA Healthy Lifestyles Month ___ Remit member per capita dues ___ Executive board meeting - ___am/pm 15 Tax return deadline *Forward 2 copies ___ PTA Scholarship Deadline *Teacher/Counselors, Nurses, PTA Volunteers ___ Association Meeting - ___am/pm ___ Reflection entries to council</p> 	<p style="text-align: center;">December</p> <p>___ Remit member per capita dues ___ Insurance due to council/district ___ Workers comp form due ___ Executive board meeting - ___am/pm</p> <p> Prepare books for auditor <i>updated: 1/30/11</i></p>

**Executive board meetings are held on: _____ [week and day in the month] (quorum= ___)


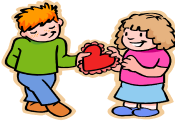
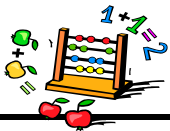


**Association meetings on: _____ [week and day in the month] (quorum= ___) **Months listed in your bylaws

2 Copies of all reports due annually (1-President & 1-Procedure Book)

Add council and district association meetings to calendar

SAMPLE

2011-2012 PTA Unit Calendar of Events and Deadlines

<h2 style="text-align: center;">January</h2> <ul style="list-style-type: none"> ___ Remit member per capita dues ___ Executive board meeting - __am/pm ___ Association Meeting - __am/pm <ul style="list-style-type: none"> *Elect nominating committee (___+__ alternates) *Read prior committee - not eligible *Elect convention delegates *Adopt bylaws (returned signed by State) ___ Scholarship /Apps to State -Feb 1 <ul style="list-style-type: none"> Graduating Senior Scholarships PTA Spotlight Award Application ___ PTA Hearst Awards <ul style="list-style-type: none"> Outstanding Family-School Partnership/Excellence *3 awards & others due: March 1 ___ Complete mid-year audit 	<h2 style="text-align: center;">February</h2> <ul style="list-style-type: none"> ___ Remit member per capita dues ___ Register for PTA Convention ___ Take Your Family to School Week ___ Executive board meeting - __am/pm <ul style="list-style-type: none"> *Present audit to board *Review mid-year budget *Review goals ___ 17 PTA Founder's Day <ul style="list-style-type: none"> Mid-year membership drive Notify members of slate of officers <ul style="list-style-type: none"> *30 day deadline before election Update procedure book! Forward Founder's Day Freewill Offering 	<h2 style="text-align: center;">March</h2> <ul style="list-style-type: none"> ___ Arts Education Month ___ Remit member per capita dues ___ Executive board meeting- __am/pm ___ Association Meeting - __am/pm <ul style="list-style-type: none"> *Adopt audit- 2 copies to council *PTA elections for next term *Bring membership list & ballots ___ Honorary Service Awards 
<h2 style="text-align: center;">April</h2> <ul style="list-style-type: none"> ___ Remit member per capita dues ___ Executive board meeting - __am/pm ___ President-elect Meeting <ul style="list-style-type: none"> with officers-elect and principal *Ratify parliamentarian & committee chairmen *Discuss future goals, plans, school calendar *Copies of bylaws for board-elect *School yr theme? Core subject focus-programs? ___ Budget meeting <ul style="list-style-type: none"> *Chairman - incoming treasurer *Committee - listed in Standing Rules ___ California State PTA Convention 	<h2 style="text-align: center;">May</h2> <ul style="list-style-type: none"> ___ Teacher Appreciation Week ___ Remit member per capita dues ___ List of officers & required chairmen <ul style="list-style-type: none"> *List due to council/district ___ Executive board meeting - __am/pm ___ Annual Historian Report due ___ Association Meeting - __am/pm <ul style="list-style-type: none"> *Membership to approve proposed budget *Approve all routine summer expenditures in budget 	<h2 style="text-align: center;">June</h2> <ul style="list-style-type: none"> ___ Remit member per capita dues ___ Executive board meeting - __am/pm <ul style="list-style-type: none"> *Incoming/Outgoing boards invited *Bring procedure books to pass on *Copies of bylaws for incoming chairmen ___ 15 Free Will Offering <ul style="list-style-type: none"> *Send final member per capita dues *Loop back to June ... 