

# Annual Report

November 2009

Susan Lipman, President

Annual Report of  
the New York State  
Congress of Parents  
and Teachers, Inc.

- ... Leadership
- ... Representation
- ... Support



- ... Communication
- ... Celebration
- ... Finance

# FROM THE PRESIDENT...

If we believe that we have “The Power to Shape the Future”, as my theme suggests, then you know we have been working hard to accomplish our goals and fulfill our mission. Building upon our initiatives, we held a second Summit co-sponsored with the Parental Information & Resource Centers (PIRCs) to continue the work begun last year in support of the Board of Regents’ Parent and Family Engagement Policy Implementation Plan. While the summits have been filled with energy, it is the work of the Action Teams throughout the year that will ultimately provide the recommendations for the systemic change that will benefit our children. We are also very proud that the collaboration between the PIRC and NYS PTA has been recognized nationally as a model partnership.



This year we have had several other initiatives come to fruition:

- Expanded the NYS PTA website to include a Members’ Only section of materials previously only sent to local presidents so that every member has access to the resources that support leadership development. Capital Region BOCES received an Award of Merit from the National School Public Relations Association for the design for our website.
- Implemented a Region Advocacy Partners program that provided in-depth training for individuals interested in advocating more effectively and included a visit to legislative offices in Albany to discuss the issues of importance to NYS PTA and its members.
- Expanded the use of CapWiz to send Action Alerts urging members to make immediate contact with legislators on issues of critical importance.
- Expanded use of Survey Monkey enabling us to leverage the benefits of technology, saving the association time and money while reaching more members for information and feedback on issues and events.
- Chartered the first community-based PTA in New York City, the Queens Community PTSA.
- Implemented an Annual Giving Plan and expanded sponsorship and advertising opportunities to provide increased non-dues revenue to fill the financial gap created by declining membership and avoid the need for a dues increase.

I have been fortunate to have attended events in 8 of our 16 Regions in my first year as president, had conversations with many region and local leaders and members, and visited a few schools along the way. This opportunity has afforded me the ability to remain in touch with what is happening at the local level. As the first year of my presidency comes to a close, I continue to be inspired by your dedication and commitment and energized to forge ahead knowing that working together PTA does what no other association can. Thank you for being part of the team that is committed to ‘making every child’s potential a reality’.



Best regards,  
Susan Lipman, NYS PTA President

## Our Mission is:

*PTA is:*

- A powerful voice for all children,*
- A relevant resource for families and communities, and*
- A strong advocate for the education and well-being of every child.*

## Our Vision is:

*Making every child’s potential a reality by establishing the New York State Congress of Parents and Teachers, Inc. (NYS PTA) as the premier organization for parent involvement and advocacy for all children.*

## Our Purposes are:

- To promote the welfare of children and youth in home, school, community and place of worship*
- To raise the standards of home life*
- To secure adequate laws for the care and protection of children and youth*
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth*
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social and spiritual education*

# LEADERSHIP AND STRATEGIC PLANNING...

## Designing a path to the future

Over the past generation our society has changed dramatically, presenting a wide range of financial, technical and service need challenges to families, schools, businesses and communities. With these changes has come the realization that volunteer organizations such as the PTA must develop new strategies to fulfill their mission. Our future success will depend on a number of critical activities initiated this past year by our Strategic Planning Committee, the Advocacy Team, and the Leadership Development and Budget and Finance Committees. The theme "Every Child, One Voice" captures the essence of where PTA must go, but it must be our volunteer leaders and unit members who must shape the strategies for getting there. Whether the setting is a parent teacher conference, a school board budget hearing, a meeting with an influential legislator or Board of Regents member, or testimony to a legislative committee, improved quality of life for children is the goal. The work to make such efforts successful is time consuming, intellectually challenging, and, at times, emotionally draining, but has never been more important. The work was begun with the task of clarifying the Mission, Vision and Purpose of NYS PTA to more closely connect the needs of individual unit members with national goals. With enhanced service to members as the central focus, the Strategic Planning Committee, under the guidance of Dr. Maria Fletcher, created three sub committees to examine Organizational Effectiveness, Member Services and Advocacy. Using large and small group discussions and feedback from member surveys these sub committees will spend the next year developing alternatives that offer promise to:

- Strengthen advocacy strategies by focusing attention on those high priority issues we are in the best position to influence.
- Research and develop resolutions whose purpose is to influence adoption of law and regulations.
- Establish a comprehensive advocacy plan based on research and adopted resolutions that includes testimony, position statements, advocacy letters and direct interaction with State and National policymakers.
- Improve communication through a review of print materials and expansion of information available through the NYS PTA website.
- Extend information services to a greater portion of our membership and expand the manner in which they are offered.
- Improve financial stability through the development of a five-year plan to implement revised investment, sponsorship and advertising policies.
- Improve the effectiveness of our Board of Managers and our Executive Board to assess member needs and quickly respond to them.
- Improve outreach efforts through development of partnerships and a better understanding of the needs of potential members. Through our outreach efforts we welcomed eight new units from six regions. They are Audubon School #33 PTA and Canandaigua PTSA from Genesee Valley Region, Nelson Mandela High School PTSA and Ossining Upper Elementary PTA from Westchester – East Putnam Region, The Queens Community PTSA from Nassau Region, Tonawanda Central PTSA from Niagara Region, South Colonie SEPTA from Northeastern Region, and the Stissing Mountain PTSA from Taconic Region. Each new unit has been given a voucher for a free registration to our Convention, so they can build leadership right from the beginning.



# REPRESENTATION...

## Sharing our efforts with others

To communicate its message, NYS PTA representatives must be credible, persistent and above all, visible. Participation by PTA volunteers and staff on the Education Conference Board helps to shape the positions of teachers, boards of education, school administrators, and others to include and value a parent perspective. A “Virtual Lobby Day” effort, now entering its fifth year, is becoming part of the message legislators expect from PTA. Testimony before legislative committees, collaborative projects with our educational partners, ongoing input to legislators, members of the State Board of Regents and a continuing dialogue with legislative and SED staff keeps the NYS PTA agenda constantly in front of State policymakers, clearly demonstrating the research and detail that goes into making the message credible. The names and faces of PTA representatives are familiar to NYS Education Department staff, members of the Board of Regents, legislators and Governor’s office staff, because we participate and because our message is carefully prepared.

This year, our volunteers and staff have represented PTA at conferences of partner organizations; spoken at press conferences, testified before legislative committees in support of maintaining a State commitment to public school funding and before the NYS Commission on Property Tax Relief, in support of expanding cost savings opportunities using the BOCES shared services model, and in opposition to caps on local property taxes. We also encouraged policy makers to study alternatives to the current school calendar that might enhance education at reduced cost, but spoke in opposition to a four day school week being considered by the Senate Education Committee. We have worked with members of the Board of Regents and education department staff to provide input on issues ranging from funding to special education to technology. We continue to promote healthy schools legislation that would create nutrition standards for school food service programs and assure attention to consistent levels of physical activity for students. PTA volunteers and staff are currently working with Education Conference Board partners to offer a conference on bullying in December 2009 that will place an emphasis on 21st century challenges in an electronic world. We participated in the selection and recognition of the NYS Teacher of the Year. We have begun working on “whole child” initiatives to advocate against a “one-size fits all approach” to teaching, testing and learning to promote 21st Century Learning skills as crucial to career development.

Over the past three years, NYS PTA has participated with National PTA in an Emerging Minority Leadership Initiative with our goal being to replicate National’s efforts in New York State. We have supported this effort through expansion of our partnership with EPIC, one of two federally-funded PIRCS (Parental Information & Resource Centers) in New York state; we co-sponsored, with EPIC, our second highly successful parent engagement summit this past September.

Continuing efforts have also involved many PTA volunteers in efforts to build New York City interest in establishing PTAs after nearly 40 years of absence, to improve after school programs, support “Go Green” efforts and recognize the achievements of special needs students with a meaningful high school diploma.

PTA representatives are regular participants in discussions to shape professional standards, recognize effective educators, establish meaningful standards for student testing and program evaluation, promote effective childhood vaccination programs, establish after school daycare standards and many other ongoing initiatives. The collective impact is that of an organization whose influence belies its relatively modest resources.



# COMMUNICATION...

## Reaching a broader audience

Achieving the PTA Mission requires ongoing communication that must be timely and must reach as many of our nearly 350,000 members as possible. We depend on three forms of communication to make this happen.

### **ELECTRONIC:**

This year, the New York State PTA took four significant steps forward to expand our use of electronic resources.

**Website:** This November marks the first anniversary of our new NYS PTA website, [www.nyspta.org](http://www.nyspta.org). An intensive two year process to assess our future needs led to an ongoing relationship with the Capital Region BOCES to develop the basic site while allowing it to easily evolve and address future needs to take advantage of opportunities presented by rapidly changing technologies. The result is a new look, a more logical organization of content, an improved ability to edit and update content and, beyond all else, an ability to grow and add new services. Beginning with a plan that provided a wide range of basic PTA information, we have added an area accessible only to members which provides access to the *NYS PTA Resource Guide* as well as workshop materials from each major conference. We have also expanded our use of member survey tools and begun development of an online registration feature. A host of new services will be added over the next several years including a PTA Store, video presentations and other online training services.

**CapWiz:** Employment of an electronic tool to facilitate individual member communication with State and National policymakers had once been considered cost prohibitive. A partnership with National PTA, however, has brought the cost within reach and greatly enhanced the ability of individual members to communicate with their legislators.

**Internal Data Library (IDL):** Managing and communicating information based on a system of complex and ever changing files is an enormous challenge whether the system is supported by a paper or electronic system. NYS PTA has spent considerable time and incurred extensive mailing costs in its efforts to keep this wide range of files up to date. A year ago, a development team led by assignee Gene Kinney introduced an electronic Internal Data Library, or IDL, which offers state and region PTA leaders a wide range of up to date documents, reports and data. Over the past year, the organization of data has been improved to make it more readily accessible and a great deal of new data has been added to it. With useful data stored and continuously updated online, the efforts of leaders who rely on this information to provide quality support to individual units and their members becomes far less complicated. Likewise, staff time and cost required to prepare and distribute updates is dramatically reduced. Such upgrades to online access to information have severely taxed the capabilities of our voice and data communications services. Upgrading those services to T-1 capability, however, will allow us to more than double previous bandwidth with little or no increase in cost.

### **PRINT:**

At the core of NYS PTA's print efforts are the *New York State PTA Resource Guide* and position statements contained in "Where We Stand". *Fast Facts*, a publication produced ten times per year, and the *New York Parent Teacher*, a four publication per year periodical and an *Annual Report*, round out the regular publications that are distributed to 2000 PTA leaders across the state. Since the *Resource Guide* is now available in the Members Only section of the NYS PTA website, hard copy publication will change to an every other year format with hard copies distributed to new unit and council presidents each year. An extensive review of the *New York Parent Teacher* publication is also under way to assess how that publication may be modified to better respond to member needs and interests. It is currently planned that "Where we Stand" will be included as part of the winter issue of the *NYPT*. There are also new projects being developed at any given time. Topic related brochures and related publications are developed by PTA volunteers, often in cooperation with "partner" organizations, based on need.

### **PEOPLE:**

From its beginnings 111 years ago, NYS PTA has depended on person to person contact to spread its message. No matter how sophisticated our efforts at communicating electronically or in print, the heart of PTA continues to be in person to person and face to face contact. Leaders within 16 regions, supported by topic related committee chairs, combine as a Board of Managers to represent PTA positions to local, state and national policy makers. The structure works but undergoes continuous review and renewal to assure that we find more effective and less costly ways to provide maximum person to person contact within the limits of budget and volunteer time.

# CELEBRATION...

## We celebrate the present as we build to the future.

Essential to the success of any organization is a determination to honor the past while we celebrate present accomplishments and look to the future. This year we celebrated the contributions of Central Region's Bridgeport PTA, winner of this year's PARP award for their program titled "Wild About Reading". Five NYS PTAs were recognized with National PTA Phoebe Apperson Hearst Family School Partnership Awards of Merit including the Arthur S. May PTA, Poughkeepsie, Briarcliff PTA, Briarcliff Manor, Fishkill Elementary PTA, Fishkill, Helen B. Duffield PTA, Ronkonkoma, and Levy Lakeside PTA, Merrick. Three other New York State PTAs were recognized for their support of the PTA founders' vision with "Take Your Family to Work Week" implementation grants. They include Brookfield PTSA in Central Region, Chester Elementary PTA in Central Hudson Region and Unity Drive PTA in Suffolk Region.

We recognized National Reflections Award of Merit Winners Jess Sander of Warwick, NY, for literature, and Lorean Galanza of Branch Brook, NY, and Kari Cornfield of Corning, NY, for photography. National PTA also recognized the New Scotland Elementary School PTA in Northeastern Region with its Mary Lou Anderson Reflections Arts Enhancement Grant. We celebrated the achievement of students planning to enter the teaching profession by awarding nine \$3,000 Jenkins Scholarships for Teacher Education to Chelsey Barker, Cassandra Funk, Lindsey Giacalone, Mary McCormack, Emily Novak, Kyle Ohlson, Jefferson Piasek, Kendal Wiertel and Matthew Wurtzel. We also celebrated awards to support the work of teachers working to improve their craft by awarding \$1,000 Teacher Fellowships in Memory of Richard Gazzola to Robyn Madden of Bayville and Maria Tedeschi of North Bellmore, New York. We celebrated Robin Kornstein of the Nassau Region as this year's winner of the Youth Humanitarian Award in Honor of Stanley Marcus, as well as winners in thirteen other regions and the many students who build community through their humanitarian efforts. We celebrated 2008-09 Newsletter Award winner, Central Region's East Hill Elementary PTA's efforts in publishing the East Hill Wildcatter. Finally, many volunteers from all parts of the state were nominated to receive the Leadership Award in honor of Jane Skrzypek. We celebrated Central Hudson's Jeanne Marie Flanigan of the Valley Central PTA Council as our 2008 state winner, as well as many region winners.

Hundreds of other individuals and collaborative teams are also honored each year as units and councils across the state acknowledge outstanding service with Lifetime Memberships, Distinguished Service, Outstanding Newsletter and Membership Growth Awards. Thousands more quietly pursue their advocacy roles with no more recognition than the inner satisfaction that comes from making the lives of our children just a little bit better. Whoever we are and whatever recognition we receive, we can all celebrate in the realization that our efforts are important and valued by those we serve.

# STAFFING...

## Building on a model for more effective support

While NYS PTA prides itself in being a volunteer operated organization, the size, complexity and scope of the operation make it impossible to pursue our mission without effective staff support. Support from a stable and specialized staff is expected to become even more critical to our future success. The basic staffing model created several years ago, provided specialized staffing for event coordination, communications, membership activities, advocacy representation and general support. The model has worked well, but we expect that it will continue to evolve.

Changes in the past year have been achieved at minimal change in overall cost but will shift some staff support to outside sources. Rick Longhurst, Clare Hart, Noreen Iacobucci, Holly Miller and Eileen O'Connor continue in their current roles. Pam Chrysler, following the birth of her daughter, will continue to support communications tasks in a part time role, with Joanne McGuirk joining the staff as part time Office Assistant. Other communications tasks will be distributed among current PTA staff with specialized support provided by outside sources such as the BOCES. The staff is committed to this evolving model, the PTA mission and to their individual roles.

# FINANCE...

## Making wise use of limited resources

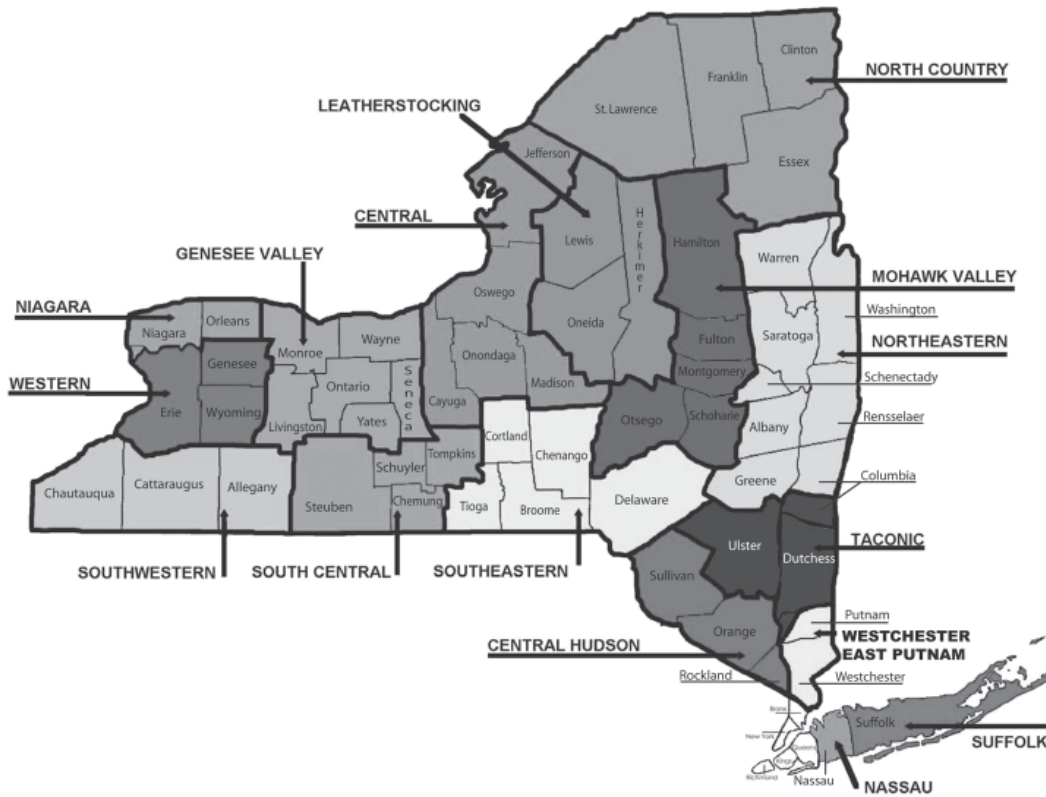
The past year has presented us with fiscal challenges that were just becoming apparent at the time we prepared our annual report a year ago. Keeping our hard earned reserves safe, our investments diversified and our hands continually on the pulse of our financial activities has become a critical priority but is not enough. Responding to a changing world economy while we continue to address declining membership will require persistence and creativity as we seek to strengthen ourselves financially at a time when our advocacy efforts are needed most. While we have been successful in managing current budgets, reducing mailing, travel and lodging costs, investing wisely and building successful sponsorship programs, we have also been expanding our electronic communications capabilities, improving our website and examining how we can make each of our volunteer and staffing resources more effective. We have worked closely with the Bonadio Group, our independent auditors, with Wells Fargo Investments and our own Board of Managers to help assure a future that will be secure and well-managed, as well as effective in addressing our core mission. A summary of recent financial activity includes:

### New York State PTA Revenue and Expenditure Activity

	Actual 2007 - 2008	Actual 2008 - 2009	Budget 2009 - 2010
<b>Revenues: General Operating Fund</b>			
Membership	\$622,089	\$605,143	\$605,000
Convention	\$113,901	\$90,752	\$85,000
Summer Experience	\$44,843	\$34,040	\$35,000
Leg/Ed Conference	\$17,496	\$20,011	\$20,500
Subscription/Publications	\$3,425	\$5,123	\$4,600
Gifts/Grants/Sponsorship	\$14,477	\$10,315	\$9,000
Distinguished Service Awards	\$3,710	\$8,175	\$7,000
Investment Interest	\$52,224	\$25,713	\$20,000
PTA Store (Net)	\$18,235	\$3,105	\$2,500
Miscellaneous/Interfund Transfer	\$3,651	\$3,475	\$2,850
<b>Total Revenue General Operating Fund</b>	<b>\$894,051</b>	<b>\$805,852</b>	<b>\$791,450</b>
<b>Expenditures: General Operating Fund</b>			
Advocacy	\$24,140	\$28,605	\$32,300
Field Support	\$73,440	\$74,490	\$75,244
Communications	\$32,634	\$50,254	\$52,150
Leadership	\$141,466	\$125,671	\$133,000
Structure	\$84,243	\$106,915	\$113,600
PTA Office	\$377,704	\$357,905	\$385,156
<b>Total Expenditures General Operating Fund</b>	<b>\$733,627</b>	<b>\$743,840</b>	<b>\$791,450</b>
Total Revenue PARP	\$18,331	\$12,363	\$1,200
Total Expense PARP	\$14,147	\$7,815	\$2,450
Total Revenue Twin Projects	\$72,382	\$67,912	\$51,800
Total Expense Twin Projects	\$36,368	\$29,506	\$44,000
Total Revenue Insurance	\$393,600	\$387,137	
Total Expense Insurance	\$292,638	\$264,913	

- Excess Insurance premiums are placed in an Insurance Reserve to protect against unanticipated insurance losses or premium increases.
- An Annual Audit conducted by the Bonadio Group CPAs rates NYS PTAs financial reports as "unqualified", the best opinion an audit firm can provide.

## OUR REGIONS



© NYS PTA® March 2009

## NEW YORK STATE PTA BOARD OF MANAGERS

### Executive Committee:

President- Susan Lipman; First Vice President- Dr. Maria Fletcher, Educator Vice President- Tamalin Martin, Vice President- Kathy Dowling, Vice President- Susan Berkow, Vice President- Michele Conklin, Vice President- Stephanie Fehr, Vice President- Sue Rau, Vice President- Lana Ajemian, Secretary- Patricia Hysert; Treasurer- Janet Meyerson

### Region Directors:

Central- Kammy Popiwczak, Central Hudson- Merle Payne, Suffolk- Doris Fischer, Leatherstocking- Donna Imobersteg, Genesee Valley- Gail Gligora, Mohawk Valley- Marge Ugalde, Nassau- Judy Van Haaren, Niagara- Diane Campbell, Northeastern- Penny Hollister, South Central- Denise Reppert, Southeastern- Tina Zdimal, Southwestern- Linda King, Taconic- Nancy Hulton, Westchester-East Putnam- Chrisanne Petrone, Western- Maria Eagen, North Country- Lynn Jock

### State Chairmen:

Arts in Education- Debbie Faraci, Bylaws- Nancy L. Cummings, Education- Neil Johanning, Environment- Michelle Nolan, Health and Wellness- Mary Ward, Family, School and Community Engagement- Pending, Legislation- Susan Pedro, Membership- Kelly A. Stephenson, NY Parent Teacher Editor- Bonnie Russell, Outreach- Alvin Benson, Parenting & Family Life- Bev Cottrell, Parents As Reading Partners (PARP) - Helen Hoffman, PTA Store Manager- Wendy DeSanto, Publications- Pam Schmitt, Resolutions- Jane Harsha, Resource Development- Julie Griffith, Special Education- Max Donatelli, Technology Communications- Pending, Twin Projects- Jacqueline Wilson

### Additional Board Members:

Youth Members- Kimberly Griffith and Angela Johanning, Immediate Past President- Maria L. DeWald, Presidential Assignees- April Jean Holdren, JoAnn Incalcata, Gene Kinney, Catherine Romano, Consultants- Janet Ahola, Richard Ahola, Mary Ann De Costanzo, Mike Meehan, Sue Rau, Gracemarie Rozea, Rhea Vogel, Penny Whiting, National PTA Board Member- Vito Borrello

### State Office Staff:

Assistant to the President- Rick Longhurst, Administrative Assistant- Holly Miller, Communications Specialist- Pamela Chrysler, Event Coordinator- Clare Hart, Membership and Insurance Specialist- Noreen Iacobucci, Office Assistants- Eileen O'Connor and Joanne McGuirk

**New York State**  
**PTA**  
everychild.onevoice.®

One Wembley Court  
Albany, NY 12205-3830  
1-877-5NYSPTA  
www.nyspta.org