

# best practices guide for parent societies and associations



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## AR 5001: School Councils and School/Parent Societies

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## Background



The Fine Arts Task Force was formed in June 2011 to examine the philosophy and direction of fine arts education in the Calgary Board of Education (CBE). In June 2012 the Task Force brought forward recommendations to advance fine arts education programs throughout the CBE. One of those recommendations was to establish a Fine Arts Standing Committee with additional representation from the Calgary arts community and CBE parents who represent all fine arts disciplines. Another recommendation was to develop “a “best practice” document to guide consistent interpretation and practice of the revised Administrative Regulation (AR) 5001 Parent/School Societies.” The Best Practices Fine Arts Subcommittee members tasked with developing best practices guidelines include a CBE principal, CBE fine arts teachers, community members and parents. The recommendations regarding best practices contained in this document are the work of this subcommittee.

This best practices document focuses solely on Part 3 of AR5001: School Councils and Parent Fundraising Groups. [AR 5001](#) is a CBE administrative regulation that applies to CBE schools, school councils and parent societies/associations that guides communication between schools and their community. The Fine Arts Task Force proposed revisions to AR5001, which were presented to CBE Superintendents’ Team. Further revisions were made after further consultation with stakeholders. Below are best practices based on the revised version of the AR.

## Best Practices Subcommittee



The representatives of this sub-committee consulted with stakeholders (teachers, parents, administration and representatives of music parent societies from across the system) and came up the following guiding principles:

1. The committee values the intention to be collaborative and transparent both currently and in the future.
2. parent societies have been formed to support and enrich school programming or specific programs in the school and are predicated on the following principles:
  - a. All activities undertaken by parent societies are meant to support the needs and success of students
  - b. The CBE values the work of parent societies
  - c. Collaboration is fostered through communication and understanding amongst parent societies/associations, school councils and the CBE
3. The Best Practices Document has been formatted to highlight the connections between the sections of AR and the Best Practice. The committee recommends that this document retain this format for clarity.

Though each member brings their own perspective to this work, the group shares some common goals around enrichment for Fine Arts Programming and student success.

\*\* These practices emerged from collaborations between schools, School Councils and Music Societies and will evolve/expand based on other school and community collaborations. Further consultation and conversations will be critical to the evolution of this work. (See Appendix D)

**Table 1: AR 5001 Sections**

AR 5001	Best Practices
<p><b>Section 13 (a):</b></p> <p>In preparation for the school year, the principal or designate, appropriate teacher(s), and the chair or designate of each school society, will meet to review and agree upon fundraising goals and events, and agree on donation of supplies, services and society expenses. A school council executive is expected to attend this meeting. The documented consultation should take into account the needs and limitations of the school/parent societies imposed on them by law or by the scope of the fundraising activities (e.g. gaming regulations and licenses).</p>	<ul style="list-style-type: none"> <li>▪ As a way to encourage transparency and better understanding, planning meetings for the subsequent year(s) should happen annually. Example: meet before the end of June (or budget year) to plan for the subsequent school year. Appendix A is to be considered the best practice guide for the planning meeting.</li> <li>▪ Stakeholders may request additional meetings if needed.</li> <li>▪ When a Parent Society is going to donate goods and/or services, it may assist the school’s financial representative by collecting monies from families and giving it to the school. The Parent Society and financial representative will share details of expenditures according to their requirements.</li> <li>▪ The disbursement of gaming proceeds must comply with Alberta Gaming and Liquor Commission (AGLC) policies and regulations. (<a href="http://www.aglc.gov.ab.ca/">http://www.aglc.gov.ab.ca/</a>) (Appendix A outlines considerations/questions for discussion regarding how casino revenue could be shared within a school.</li> </ul>
<p><b>Section 13 (b):</b></p> <p>Funds raised, services and materials supplied by school/parent societies:</p> <ol style="list-style-type: none"> <li>I. will be raised for the school and donated in accordance with Section 17(2)</li> <li>II. once donated to the school, fall under the legislative authority and accountability of the principal; and</li> <li>III. will become the property of the Calgary Board of Education.</li> </ol>	<ul style="list-style-type: none"> <li>▪ Some parent societies may choose to have an Administrative Assistant. The Administrative Assistant may function as a society employee and/or as a school volunteer. (Appendix C)</li> <li>▪ Any questions about specific situations can be directed to the CBE Manager of Corporate Financial Services</li> <li>▪ Parent Societies may undertake fundraising activities to support a particular program offered within a school. Proceeds from these activities will be deposited to a bank account in the name of the Parent Society and used to pay for goods and services permitted by its bylaws. Some fundraising projects may be designed to allow students to earn individual credits towards reducing the cost of a particular event.</li> </ul>

AR 5001	Best Practices
<p><b>Section 13 (c):</b></p> <p>When funds raised are donated to the school, the principal will ensure that the use of funds reflects the understandings developed through consultation, in accordance with Section 17(2) and that an accurate accounting is provided to the school/parent societies as those funds are expended.</p>	<ul style="list-style-type: none"> <li>▪ The school will provide a regular report to the society regarding the expenditure of society funds donated to the school.</li> </ul>
<p><b>Section 13 (d):</b></p> <p>The school council will work with the registered school/parent society's designate(s) in support of fundraising activities.</p>	<ul style="list-style-type: none"> <li>▪ Ongoing communication is encouraged through a society representative attending regular school council meetings. Alternately, regular reports about fundraising activities should be provided. This will encourage transparency between all parties and avoid overlapping activities.</li> </ul>
<p><b>Section 14:</b></p> <p>CBE employees are discouraged from becoming officers of school/parent societies:</p> <p>(a) if CBE employees hold office or have signing authority for the school/parent society for the school in which they work; or</p> <p>(b) if the number of CBE employees on the school/parent society of the school in which they work is considered sufficient to influence the independence of the decisions of the school/parent society.</p>	<ul style="list-style-type: none"> <li>▪ A principal or his/her school designate (i.e., the specific program teacher) in a non-voting capacity should attend society meetings and events to inform the society of the needs of the school/program.</li> <li>▪ Society bylaws should be reviewed and revised to ensure that teachers and administration at the society's school do not have voting privileges and/or signing authority.</li> <li>▪ CBE employees who work outside of the society's school can have voting privileges.</li> </ul>
<p><b>Section 15</b></p> <p>If money is received by the school from the school council or the school/parent societies:</p> <p>(a) it is considered a donation in the hands of the school and must be recorded in an appropriate donation revenue account within the financial records of the school; and</p> <p>(b) official receipts for Income Tax may be issued in accordance with Administrative Regulation 7009 - Donations from the Community, as long as:</p> <p>i. the money is forwarded to Finance &amp; Supply</p>	<ul style="list-style-type: none"> <li>▪ An official receipt which outlines the purpose of the donation will be provided by the school to the society.</li> <li>▪ A report of the expenditure of donated funds will be provided within thirty days of request.</li> <li>▪ A specific account(s) held in the school will be created to track donated funds. (example "King George Parent Society Account")</li> <li>▪ Official receipts for Income Tax may also be issued by a parent society that is qualified to do so (Charitable Organization status).</li> </ul>

AR 5001	Best Practices
<p>Chain Services, Treasury Accountant for the CBE who will issue such receipts for income tax purposes; and</p> <p>ii. a budget transfer, in the amount of the donation, is made to the school's decentralized expense account(s) by Finance &amp; Supply Chain Services department.</p>	
<p><b>Section 15 (c):</b></p> <p>Purchases of supplies or equipment from donated money retained in the school must be recorded in the financial records of the school in accordance with Administrative Regulation 7004 - School Generated Funds.</p>	<ul style="list-style-type: none"> <li>▪ A trained school representative will enter the items retained as inventory. One example of this is Archibus (a CBE electronic inventory system).</li> </ul>
<p><b>Section 15 (d):</b></p> <p>Where purchases of supplies or equipment are made by the school:</p> <p>i. Such purchases must be in accordance with Administrative Regulation 7001 – Purchase of Goods and Services, and purchasing standards of the CBE; and</p> <p>ii. The school must claim the Goods and Services Tax (GST) rebate and the school principal or designate must inform the school council or school/parent society, as appropriate, of the GST claim to ensure that only one claim is made</p>	<ul style="list-style-type: none"> <li>▪</li> </ul>
<p><b>Section 15 (e):</b></p> <p>A principal or designate is expected to acknowledge a school council or school/parent society donation in an appropriate manner.</p>	<ul style="list-style-type: none"> <li>▪ Public acknowledgement of support provided by societies can include a thank you letter, announcement, newsletters etc.</li> </ul>

AR 5001	Best Practices
<p><b>Section 15 (f):</b></p> <p>All assets purchased by the school out of monies provided by the school council or school/parent societies become the property of the CBE and will be for the use of the school.</p>	<ul style="list-style-type: none"> <li>▪</li> </ul>
<p><b>Section 15 (g):</b></p> <p>All donations of money or assets become the property of the CBE to manage as it deems appropriate. It is understood that the CBE will not ordinarily remove monies or assets from the school to which they were donated.</p>	<ul style="list-style-type: none"> <li>▪ A donated item may be received by the parent society; a tax receipt may be issued by the society if they are qualified to do so. The tax receipt may also be issued by the CBE in accordance with 18-1(b).</li> </ul>
<p><b>Section 15 (i):</b></p> <p>Documented review of the use of funds, supplies and services provided by the school/parent societies as per Section 17(2) will be provided annually by the principal or designate to the school/parent societies.</p>	<ul style="list-style-type: none"> <li>▪ A documented review will be provided at the annual meeting (identified in the best practice associated with 17 (2)).</li> </ul>
<p><b>Section 16 (a):</b></p> <p>The decision to remove monies or assets from the school to which they were donated will be made by the principal, in consultation with the Area Director and relevant school/parent societies. Documentation on the decision would reside at the Area Office</p>	<ul style="list-style-type: none"> <li>▪</li> </ul>
<p><b>Section 16 (b):</b></p> <p>In the case of a school closure, the relevant school/parent societies will be consulted by the Area Director prior to the movement of monies raised or assets donated.</p>	<ul style="list-style-type: none"> <li>▪</li> </ul>
<p><b>Transitional Provision:</b></p> <p>This Regulation will come into effect immediately, with the following exceptions:</p> <ol style="list-style-type: none"> <li>1. fund-raising already approved through the</li> </ol>	<ul style="list-style-type: none"> <li>▪ Previous gaming (casino/bingo) agreements, and the spending of funds related to those agreements, will be honoured (any changes to planned expenditures must be approved by) Alberta Gaming and Liquor Commission.</li> </ul>

AR 5001	Best Practices
<p>gaming process will be completed as approved; and</p> <p>2. where school/parent societies have processes mandated by their by-laws which conflict with the requirements set out in s.17(3) of this Regulation, there will be a one year transition period from the publication date of this Regulation to allow CBE staff to continue working with school councils and parent societies to achieve fundraising goals and CBE Results.</p>	

## Appendix A: Discussion Guide for Annual Planning Meeting

### Meeting Date:

**Attendees:** (School Administration, Society representative, School Council representative, Staff representative)

### Possible questions for parent society members to guide discussion

#### A. General Fundraising

1. What groups want to fundraise in the next school year?
2. What are the goals and plans of each group for the following school year? – Is there a long term plan
3. What projects/events/enrichment activities does each group want to undertake?
4. What fundraising is being planned and how will it benefit the students? Start and end date? Projected revenue?
5. How and when are groups going to fundraise?
6. What communication is required throughout the year?
7. What expectations does each group have of the school throughout the year?
8. What kind of acknowledgement does each group value from the school?
9. How can groups work cooperatively throughout the year?
10. Are there any competing initiatives? How can these be resolved?
11. What are the goals/visions of families (parents/students)?
12. How can the school help meet their needs/wishes?
13. What fundraising projects and/or procedures have been successful in the past?

#### B. Casino

1. Have gaming applicants demonstrated clearly their links to the school vision and enrichment, the number of students to benefit, and specifics about how they will spend funds?

2. Have applicants demonstrated the fundraising activities and volunteer involvement they have been successful in over the past two years?
3. Have interest/parent groups – music, drama, athletics, academics - demonstrated that they have been active groups (actively raising funds) for a minimum of two years and have run other successful fundraising projects in support of their programs in order to be participants in the gaming activities?

### **For principals**

#### **A. General Fundraising**

1. How are undertakings going to be communicated to teachers?
2. How will the agreement between administration and societies be documented and shared between all parties?
3. When will representatives from the parent societies, parent council and the principal meet to discuss school fundraising activities, including gaming?
4. How do the decisions around fundraising reflect the vision for your school?
5. What interest/parent groups want to participate in the fundraising activity?
6. How will fundraising proceeds be distributed?
7. How are fundraising activities that take place within the school coordinated?

#### **B. Casino**

1. How do the decisions around casino reflect the vision for your school?
2. What interest/parent groups want to participate in the casino activity?
3. How will casino proceeds be distributed?
4. What are the timelines for volunteer participation in the gaming activity?
5. Who writes casino or grant applications and how is this linked to proceeds designated to support the school?
6. How are interest /parent groups represented on School Council?

**At the (yearly) meeting in June, the parent society, parent council and principal will agree upon:**

- % of funds to be distributed based on organizational responsibility in submitting and following through the paperwork and by the number of volunteers provided by the (each) interest/parent group
  
- The organization responsible for coordinating the aspects of the gaming activity (i.e. parent society holding the gaming license) to determines the timeline for the volunteer list prior to the casino and communicate this to the interest groups – if an interest/parent group is unable to fill the number of volunteers from their group, the percentage of the funds are distributed differently

## Appendix B: Dispute Resolution Process

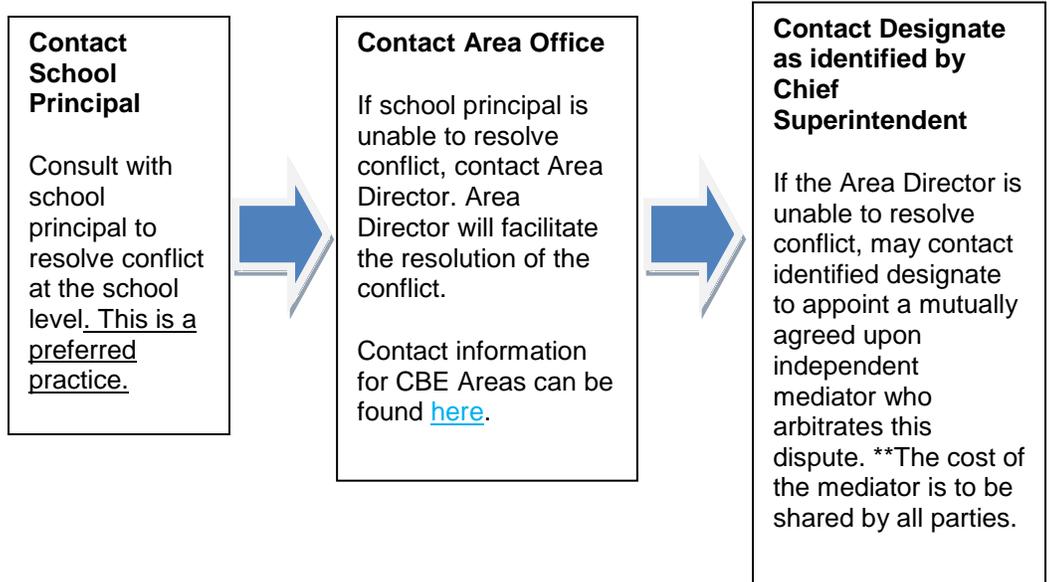
For any of the best practices identified in this document, there is the possibility that conflicts amongst parties could arise. Every effort should be made for conflicts to be resolved at the school-level in a timely manner.

### Internal Society Disputes

It is also expected that school councils and parent societies/associations have an internal dispute resolution mechanism in their by-laws. If a dispute arises and there is no such mechanism identified in the by-laws, school councils and parent societies/associations may pursue the following options at their own cost: assistance by a facilitator in dispute resolution techniques, assistance by an outside trained facilitator, or any other dispute resolution method that the parties agree upon.

### Other Societal Disputes (CBE, school, school council, other societies)

- a) If parent societies and associations are unable to resolve conflicts at the school-level, the process identified in AR5001 can be followed for resolution.
- b) The committee recommends the following alternative mediation process.



## Appendix C: Best Practices regarding Administrative Assistants for Parent Societies

Through consultation with stakeholders including society members, teachers, principals and CBE representatives in Human Resources, Communication and Senior Administration, the following job descriptions delineate the differences between the roles that a society's administrative assistant plays for the society and as a volunteer in the school.

- Parent societies formed to support school programs may develop a need to engage the services of an Administrative Assistant. In many cases, the Administrative Assistant will not only assist the parent society to conduct its business, but will be expected to provide volunteer services to the school program supported by the parent society. The job description for the position of Administrative Assistant should clearly delineate these two roles and should be understood by the parent society, the teacher(s) of the program being supported by the parent society, and the principal or designate.
- Parent societies should use a rigorous selection process to ensure the Administrative Assistant can perform both the duties required by the parent society and the volunteer services which may be required by the school.
- The parent society should consult with the teacher(s) of the program it is supporting and with the principal or designate during the hiring process.
- If the Administrative Assistant will be conducting parent society business in the school, it is the right of the principal to decide whether to provide "hotelling" services.

### **Job Description**

#### **Administrative Assistant for Parent Societies**

Parent Societies are formed to support school programs by providing enrichment opportunities that would not otherwise be possible. Many parent societies undertake fundraising projects to fund their activities.

The Administrative Assistant reports to the Board of Directors of the Parent Society, supporting the day-to-day activities of the society, fundraising initiatives, financial records and communications with families.

#### **Skills required:**

- Excellent relationship building and interpersonal skills
- Excellent oral and written communication skills

- Strong organizational skills, ability to prioritize and complete multiple tasks under time constraints
- Ability to work independently to complete job tasks
- Intermediate to advanced level ability with MS Office suite of programs, especially with Word, Excel and Publisher
- High level of attention to detail
- Intermediate to advanced level ability with accounting software such as Simply Accounting or QuickBooks
- Prior experience with programs supported by the Society and/or non-profit experience may be desirable

**Duties related to the business of the Parent Society**

- Maintain membership records, including fees and donations collected
- Track revenue generated from fundraising projects and student credit accounts
- Assist with organizing volunteer activities
- Respond to e-mail and phone inquiries from families
- Co-ordinate the sale of tickets to society events
- Maintain accounting records for the society using appropriate accounting software
- Collect funds from fundraising activities and special events and prepare deposits for the society's bank account
- Reconcile bank statements to accounting records monthly
- Responsible for accounts payable
- Prepare or assist Treasurer to prepare monthly financial statements
- As needed, maintain an inventory of uniform items
- As needed, help issue, collect, repair and clean uniforms each year
- Attend all society meetings
- Communicate with families regarding fundraising activities and society events
- Assist Treasurer with preparation of periodic government reporting
- Perform other duties, as required

**Job Description**

## **Volunteer Role**

Parent Societies are formed to support school programs by providing enrichment opportunities that would not otherwise be possible. Many parent societies undertake fundraising projects to fund their activities.

The volunteer role works actively with the society, parents and school to enhance and strengthen programs supported by the society.

### **Skills required:**

- Excellent relationship building and interpersonal skills
- Excellent oral and written communication skills
- Strong organizational skills, ability to prioritize and complete multiple tasks under time constraints
- Ability to work independently to complete job tasks
- Intermediate to advanced level ability with MS Office suite of programs, especially with Word, Excel and Publisher
- High level of attention to detail
- Intermediate to advanced level ability with accounting software such as Simply Accounting or QuickBooks
- Prior experience with programs supported by the Society and/or non-profit experience may be desirable

### **Volunteer activities to support school programs**

- Provide support to the staff and school
- Assist with maintenance of uniforms, as requested
- Assist with organization and maintenance of equipment, such as musical instruments, used in a school program
- Photocopy materials for use in the classroom
- Organize, collate and file printed material
- Facilitate communication with external agencies
- Accompany students and teachers to events held away from the school
- Adhere to all CBE volunteer regulations
- Perform other tasks as requested by principal or designate (typically the teacher in charge of the program supported by the parent society)

## Appendix D Resources

- [AR5001 School Councils and School/Parent Societies Societies Act](#)
- [Societies Act](#)
- [Alberta School Council Resource Manual \(Alberta School Councils' Association/Alberta Education\)](#)
- [CBE School Council Handbook](#)
- [CBE Fine Arts Standing Committee website](#)
- [Alberta School Councils' Association](#)
- [Calgary Association of Parents and School Councils](#)
- [www.cbe.ab.ca](#)
- [Alberta Gaming and Liquor Commission \(AGLC\)](#)