



New York State PTA Guidance on PTAs and School Budgets in Difficult Times

The Governor's budget for 2012 – 2013 has proposed an increase in aid to education of 4.1% over the amount provided in the 2011 – 2012 budget. The actual amount allocated to each district varies considerably from this overall percentage increase. School boards continue to face challenges in developing their 2012 – 2013 budgets as a result of the newly imposed 2% tax levy cap. School boards will have to make very difficult choices in order to meet the needs of the children in their communities while adhering to the requirements set forth in the tax levy cap legislation.

PTAs and Requests for Financial Assistance and Donations

PTA is an educational advocacy organization and should not allow itself to be the provider of services, supplies or equipment even during difficult financial times. PTAs that feel pressure to provide financial assistance may find themselves under fire from varying groups requesting funds and may not be able to provide it to everyone, thereby creating dissension within their own school community.

Reasons why PTAs should not provide this type of support:

- It establishes a precedent that it is an acceptable practice and it may not be able to be sustained over time.
- It can result in an inequity among schools in a school district.
- When one PTA provides services, supplies or equipment, it puts the other units in the district in a difficult position by exerting pressure for a similar item.
- Equipment does not necessarily remain in the school it was originally intended for.
- Who will be responsible for the maintenance of the item?

Constant fundraising establishes PTA as a "fund-raising" organization and our true purpose as advocates for children will be diminished. It is not PTA's job to provide financial assistance to schools. It is PTA's responsibility to be vocal during the school district's budget sessions to ensure that the needs of the children are met.

PTAs and School Budgets

It is the PTA's responsibility to educate themselves and to promote an understanding of the educational needs of the community and how the school budget supports those needs. PTAs should carefully review and consider the budget as proposed by the school board. Following that review a PTA may choose to take a position to support, educate about or oppose the school budget.

In order for a unit to take a position on a proposed budget in the name of the unit, a vote of its general membership **must** be taken. In accordance with unit bylaws the proper notification of the meeting **must** be given to the members.

In order for a council to take a position on the budget in the name of the council, an instructed vote is required. Each unit's general membership takes a vote and each unit then has one vote on council. If only the voting body of a council takes a position, it must be clearly stated that the position is that of the voting body of council and not the council as a whole.

If only the executive board of a council or a unit votes to take a position, it must be clearly noted in any letters, publicity, etc., which body has taken this position.

A proposed school budget need not contain all of PTA's priorities for it to be supported. A statement of PTA's concerns can inform the board of education of those aspects of the budget with which it does not concur. As a caution, opposing a school budget for insufficient funds and/or educational programs may be misinterpreted.

PTA's position on the proposed budget and any statements of concern should be publicized in newsletters, local newspapers, fliers to parents and other community members. It is import to include an explanation when publicizing PTA's position.



Information regarding the date of the budget vote may be sent home with students, but state education law prohibits the use of public funds to urge a "Yes" vote. If a PTA seeks to encourage a "Yes" vote the PTA:

- May not reproduce any fliers or newsletters publicizing their position using school copy equipment or paper. This must be paid for using PTA funds.
- Information must be mailed home and the PTA is responsible for the costs including postage.
- School phones cannot be used to communicate the PTA position.

School Budget Timeline

- March 1st – Districts must submit information necessary for the calculation of the tax levy limit to the state comptroller, commissioner of education and the commissioner of taxation and finance.
- April 23rd - Districts must transmit "Property Tax Report Card" to NYSED by the end of the next business day following its approval by the school board, but not later than the 24th day before the budget vote
- April 24th – May 1st - Districts must complete the budget 7 days before public hearing
- May 1st – 8th – Board must hold public hearing on the budget
- May 1st – 15th – Copies of the budget must be available to the residents upon request
- May 9th – Deadline for mailing budget notice
- May 15th – Annual Budget Vote and School Board Election
- June 19th – Uniform Budget Re-Vote

Additional Resources:

- The New York State PTA Resource Guide which can be found in the Members Only Section of the website at www.nyspta.org
- Your Region Director and Associate or Assistant Directors are valuable resources to assist, advise and guide you when dealing with these difficult issues.