Leadership Training
Connect | Lead | Collaborate

2026

Last updated October 27, 2026

Our thanks to the Federation team for the content of this presentation:

Shirley Smedley Jay - Executive Director
Vicki Bryanton - Facilitator
Stephen Gould- Facilitator

Workshop host schools, Home & School Presidents and School Principals:
#1: Tues. Oct. 6, Alberton Elementary School,
#2: Mon. Nov. 2, Spring Park Elementary School
#3: Tues. Nov. 3, Souris Regional School



Introductions and Agenda for Tonight

1. Federation and local groups
2. What can Leadership Look Like?
3. Finances and Best Practices
4. Collaboration and Discussion



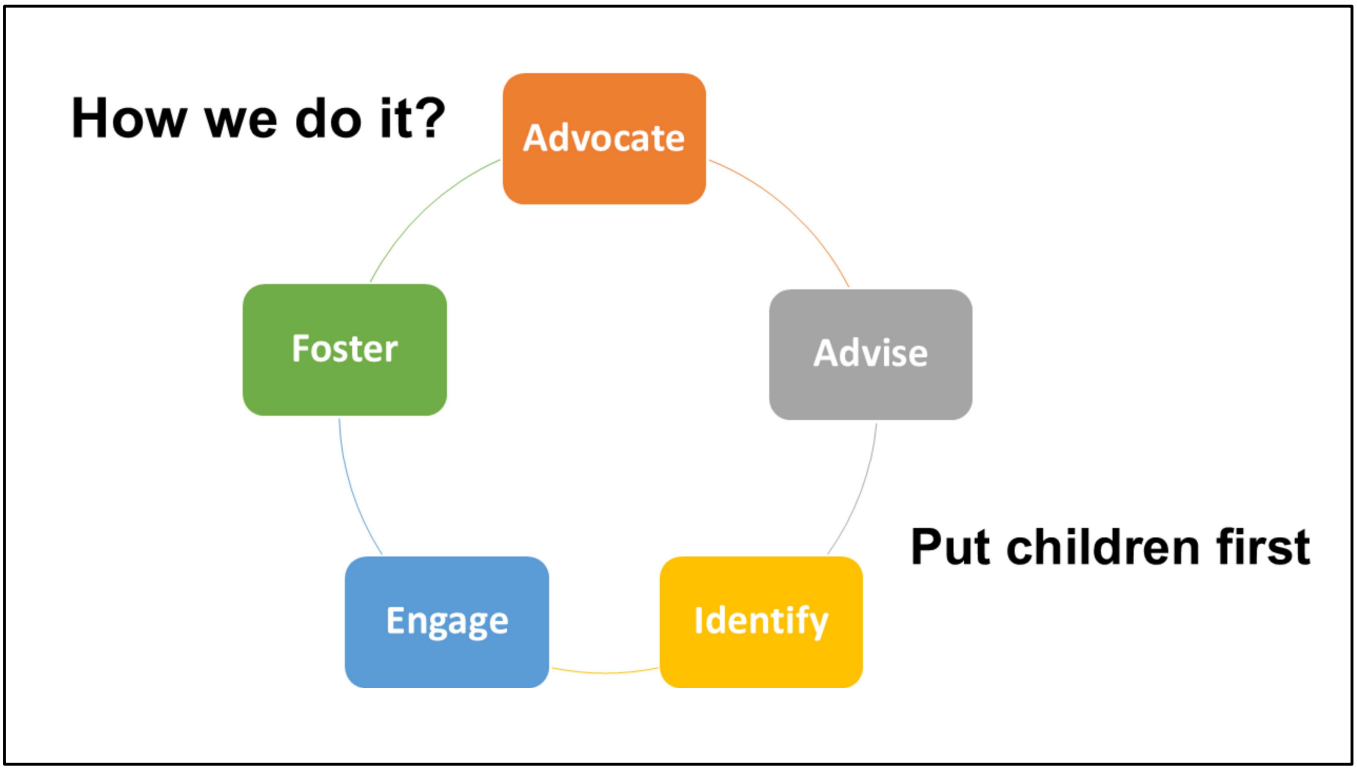
The Federation Connects the School Communities

- Connect parents and guardians with educators, staff, administrators and trustees.
- Bring local voices together around student well-being and education.
- Share resources, experience and provincial perspectives across Island schools.

We're the glue that connects parents/guardians, students and the community at large, with teachers and principals and staff and volunteers and administrators and trustees.

Introduce Home and School Handbook:

- **p. 4** for Home and School Objectives - see ***Home and School Handbook*** **(16th Edition October 2026)**



Home and School is a body of parents, teachers and students working together to advocate, advise, identify priorities, engage communities and foster collaboration.

Home and School is a body of parents, teachers and students who will:

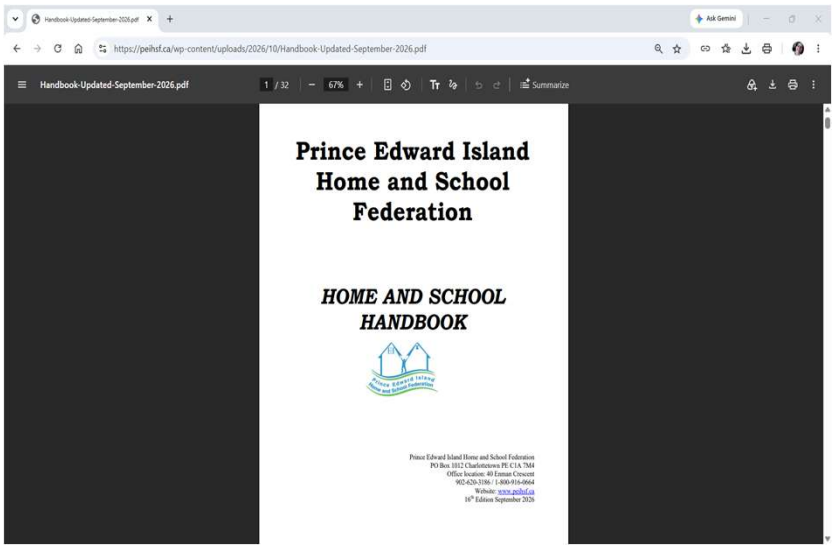
1. Advocate for the best educational experience for all Island students.
2. Advise, where possible, the Minister of Education and Early Years, Public Schools Branch and other decision-making bodies on education, health and well-being issues as they relate to children and youth.
3. Help to Identify education priorities locally and provincially.
4. Engage all school communities in educational discussions.
5. Foster collaboration among schools and the community.

Ask participants: *Which of these roles feels most familiar in their local Association and which one they would like to strengthen?*

On the Website peihsf.ca

Tabs to checkout:

- **About - Board of Directors**
- **Initiatives - Home and School Training**
- **Meetings - Resolutions**
- **Schools - Home and School Contacts**
- …and more!



Website Tabs to Explore:
About – Board of Directors
Executive & Board Members - in regions across the province
• http://peihsf.ca/board

Home and School Training - you will find the **Home and School Handbook** and so much more

- Initiatives - Home and School Training https://peihsf.ca/home-and-school-training/
- Handbook - https://peihsf.ca/wp-content/uploads/2026/10/Handbook-Updated-September-2026.pdf
- Meetings – Resolutions https://peihsf.ca/resolutions/
- Schools – Home and School Contacts https://peihsf.ca/schools/

Resources – from funded opportunities to links to available resources – check it out:

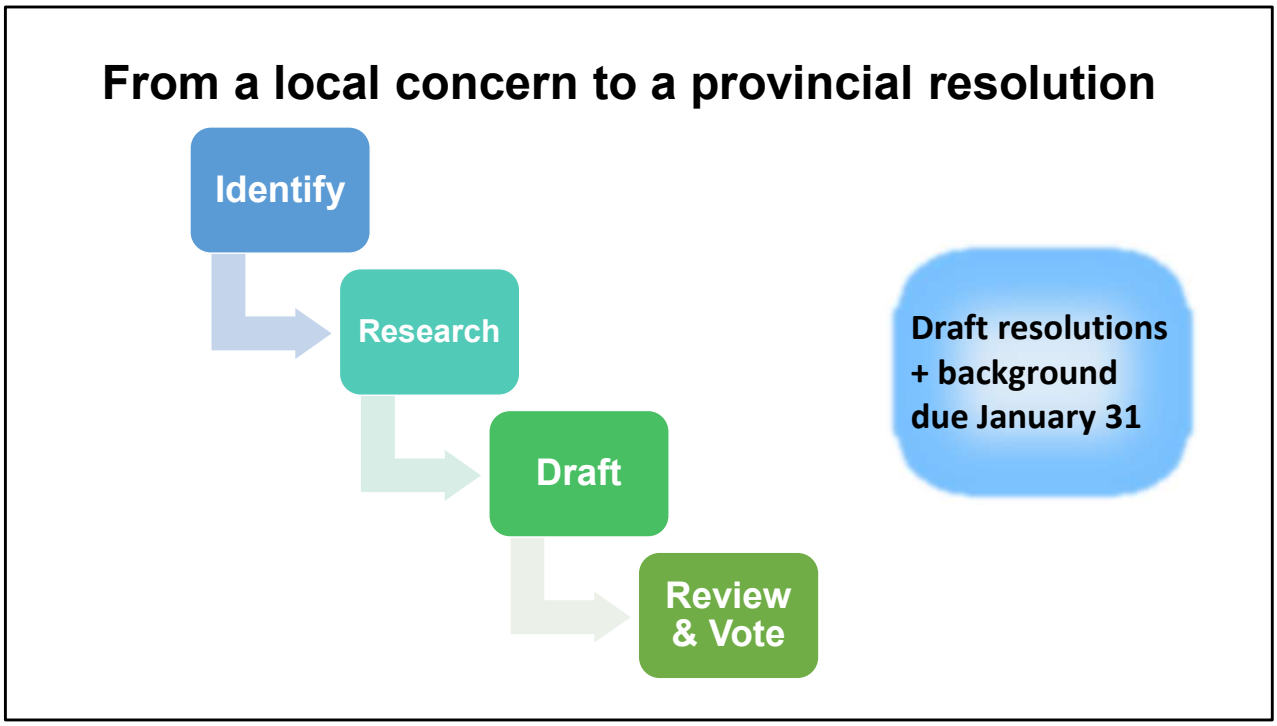
- What is there to offer to your group?
- What would your group like to promote in your community?

Federation Board

Position	Name
President	Tom Deelstra
Past President	David Schult
Vice-President	Mary MacDonald Pickering
Treasurer	Craig Goodick
Secretary	Bev Campbell

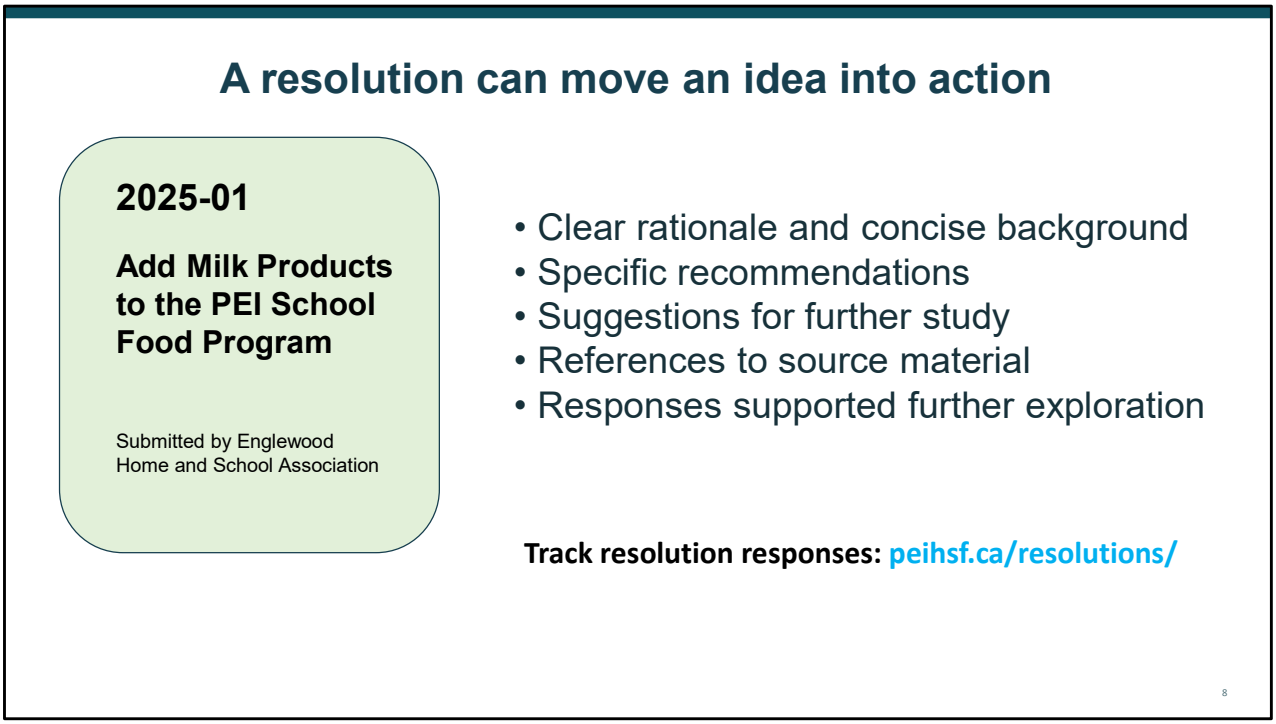
Regional Directors	Name
Bluefield	Andrea Kelly
Charlottetown Rural	Bethany Robinson
Colonel Gray	*vacant*
Kensington	Coreen Pickering
Kinkora	Steve Charlebois
Montague	Kate Drake
Morell	Sarah Hansen
Souris	Kelly Steele
Three Oaks	*vacant*
Westisle	Christina Sidwell

In addition to the Executive, there are 10 Directors – one for each of the Public Schools Branch Family of Schools. Each serves a 2-year term



Identify
Is the issue bigger than one school?
Research
Describe the issue, background and possible solutions
Draft
Write clear Whereas and Be it resolved statements.
Review & Vote
Committee review, local discussion and Annual Meeting vote.

Draft resolutions + background due January 31



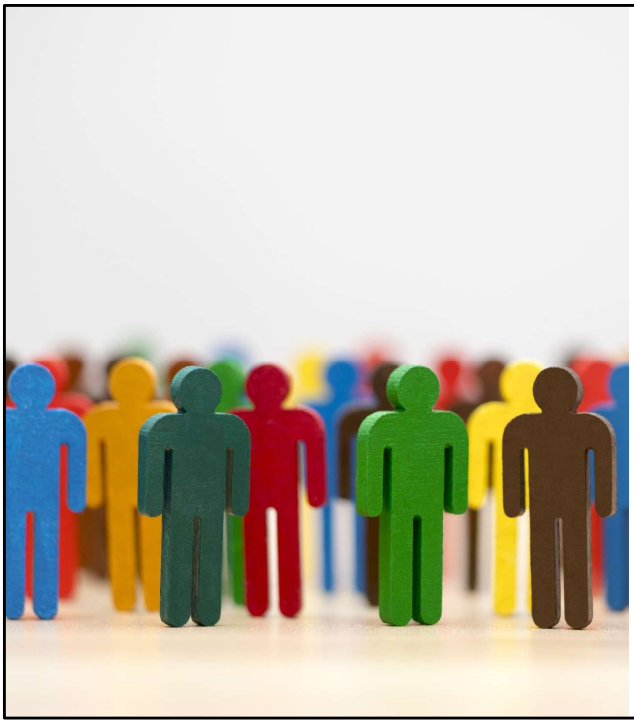
Use Resolution 2025-01 as a concrete example of how to present an issue. Englewood Home and School Association submitted the resolution to add milk products to the PEI School Food Program.

Why it worked:

1. the resolution had a good rationale, succinct background information,
2. made specific recommendations and suggestions for study and
3. Provided source references

Responses were received from the Department of Education and Early Years, the Public Schools Branch and the PEI School Food Program, and all supported further exploration.

Emphasize that progress and responses to resolutions can be followed on the Federation website.



Leadership

It’s a Team Effort

Your Local Team

- President or Chair
- Vice President
- Past President
- Secretary
- Treasurer

"Co-positions"

Each person takes a "leadership role" but it does not mean that they do it all on their own.



Turn to p. 7 of Handbook

Executive member takes a leadership role for their job description, but that does not mean they must do everything themselves. Roles can be shared or held by co-leaders.

- President/Chair
- Vice President/Chair
- Past President/Chair
- Secretary
- Treasurer

Usually, you have a President/Chair and most of your Executive Team in place starting the school year.

If you don't have enough executive team members try this approach:

1) invite others to help with a **planning** session,
2) after the planning session, describe the roles of the empty Executive positions
3) ask for volunteers – pause to allow people to really consider it, remind them that the "team" is here to help each other
4) if no volunteers step up, ask the group to think about it for a while
5) approach individuals after the meeting (you can try right after if someone looks promising or contact them within the next couple of days)
6) ratify or vote on positions you fill at an open meeting for your Association – but the volunteer can start work right away

President/Chair – creates space for others

- Prepare and lead meetings
- Set a relaxed, respectful tone
- Keep things on track
- Start and End on time

See Home and School Handbook
- *How to Run an Effective Meeting*
- *Agenda* sample

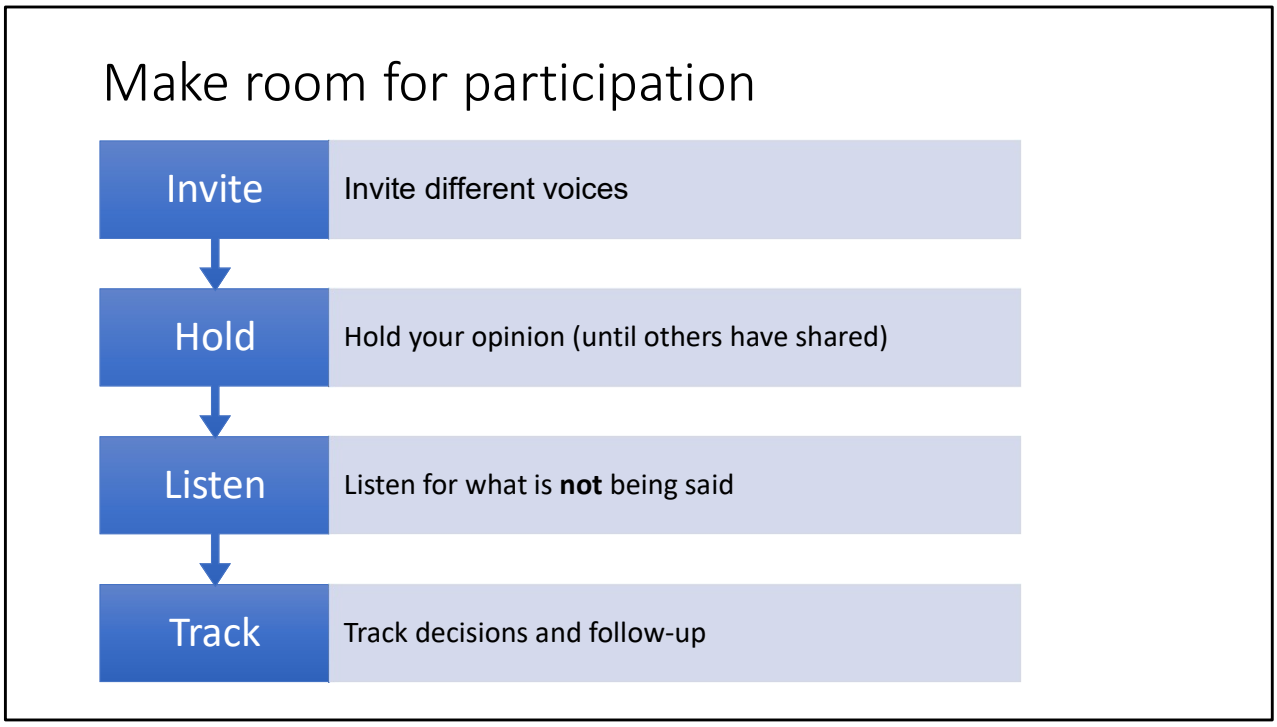


Information on tools for the President or Chair can be found starting **on p. 7** of the **Home and School Handbook**

Your key roles during a meeting is to:
- Prepare and lead meetings
- Set the tone - be relaxed but keep things on track
- Follow an agenda to stay on track
- Start on time out of respect for those who arrived on time. End when you said the meeting would end.

How to Run an Effective Meeting **starts on p. 10 of Handbook**
Sample Agenda **on p. 18**

Ensure that you include **the "Add this to your Agenda" from the Federation's monthly newsletter**



The Chair's job is not to have all the answers. It is to help the group do its best thinking.

Holding back your own opinion, especially early in a discussion, can encourage others to speak and make it easier to listen carefully.

If the Chair speaks first or forcefully, some participants may be less willing to challenge an idea.

Keep your own list of decisions and follow-up instead of waiting for the minutes.

Power of the Secretary!

- Flag when a motion is needed
- Track any “motion” in play
- Recall previous decisions
- Pause discussion to clarify wording



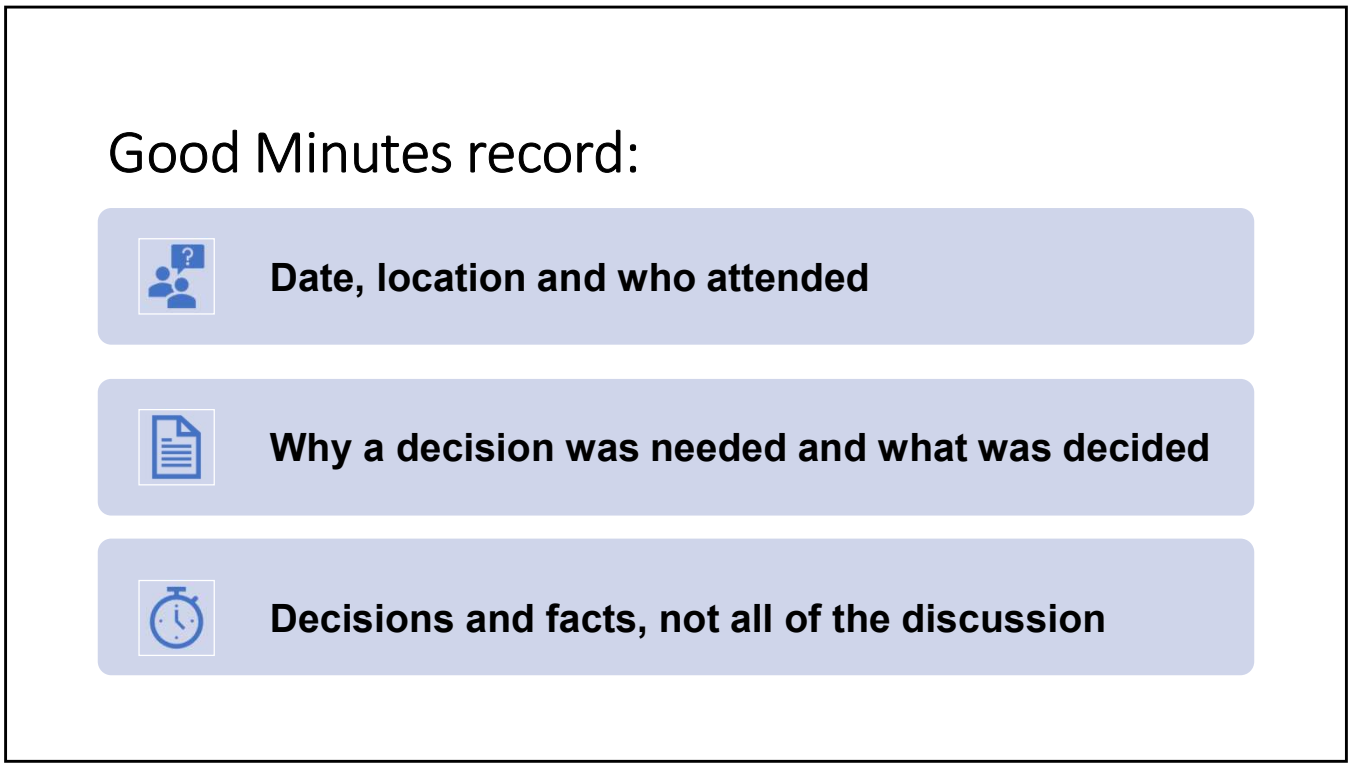
The Secretary has real power to support an effective meeting. Encourage the Secretary to speak up when the group needs a motion, when wording needs to be captured clearly, or when the group is repeating a discussion already settled.

Secretaries can help to **keep things on track** – they can

- remind members when they need a motion,
- keep track of when they have a motion in play,
- know the history of what was talked about at previous meetings or remind others if similar decisions have already been made

Allow your Secretary to **stop the discussion** in order to complete the process and get wording down

Secretary can ask for help with the wording



Pages 21-22 of Home and School Handbook – *Sample Agenda and Minutes*

Minutes record “decisions” not discussion and should also include: the date and who was at the meeting (although ALL Board Members/Executive Members are responsible for decisions of the group – so if you miss a meeting, you must read your minutes to know what happened in your absence)

Minutes record “facts” not rumours – nothing should be written down that you cannot back up

Should have enough detail to understand the intent – when someone else reads your minutes, they should be able to see:

- why you needed a decision? and
- what was the decision?

Treasurer - make decisions visible



- Plan it
- Track it
- Report it
- Protect it

See expectations of the ***Treasurer*** **on p. 9** of **Handbook** and the ***Fundraising Guidelines*** **on p. 25**

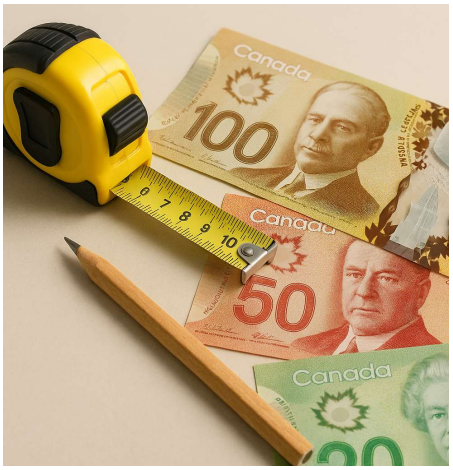
Plan it, track it, report it, protect it

Don’t let this role become so overwhelming that you get stuck. It is easy to get behind in bookkeeping or get confused.
Don’t let these situations trap you.
Ask for help within your group. If help is not readily available, contact the provincial office for advice and assistance.

Plan it - the Money Plan - Budget

After you discuss what you "want" and "need" to do – work with your Treasurer to answer questions:

- How are we paying for it?
- Do we need an additional fund raiser?
- Do we need to cut out some of our "wants?"



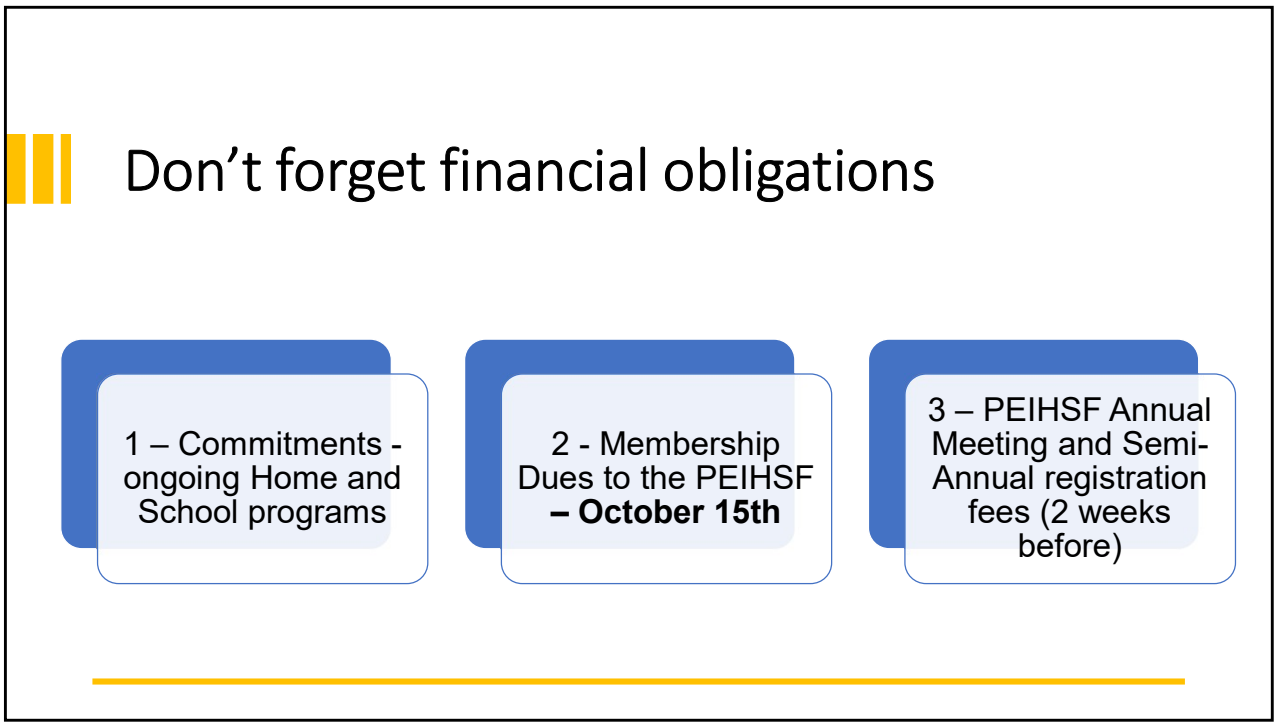
Even if you don't have a formal "budget" you need to do some money planning. Have the whole Board involved in this process and get as much input from other parents as you can.

Get input from the Principal – ask about plans for the school and decide how the Home and School might help out.

After you know what you "want" and "need" to do – work with your Treasurer to answer:
How are we paying for it?
Do we need an additional fund raiser?
Do we need to cut out some of our "wants?"

A budget is an estimate – your best guess at this point – that you may need to adjust along the way.

Image created by Copilot



Don’t forget financial obligations
Associations pay a membership fee to the Federation each year:

- $100 for schools with under 200 students
- $200 for schools with over 200 students

The **PEIHSF membership fees are due October 15th**

Registration payments for PEIHSF semi-annual and annual meetings are due **two weeks before the event**

Be true to your Association’s principles and objectives

Track it -the paperwork

- Deposit slips
- Receipts
- Processed/cancelled cheques
- Journal entries



Deposit slips – keep the slips to show the money was put into the bank; supports the journal entries

Receipts – get a receipt for all purchases made and provide a receipt for all donations received

- In the event that no receipt was received or issued, create a statement containing date, amount, explanation, and your signature.
- For example: an event charges a $5 fee paid at the door but no individual receipts are issued. At the end, the amount is counted and a statement created containing the date, the total collected, an explanation of the event and why no receipts were issued, and signature (2 people preferred for safety reasons.)

Keep a list of processed cheques – cheque number, date, paid to, $ amount, purpose of payment. Should connect to a receipt/invoice.

Journal entries are a dated and item-by-item list of money coming in and going out – on paper or electronically. This is the best way for tracking all in one place.

JOURNAL ENTRIES

Date	Income	Expenditure	Current Balance	Who to/from	Reason

Journal Report – accounting for what came in and what went out

Similar to a personal chequing account

Keeps a running total of what is in the bank

Report it - Treasurer's Financial Report



- Keep it simple
- Be prepared for questions
- Don't overwhelm them
- Most people want to see the bottom line

Report it

This is where using your Journal entries comes in handy along with the bank statement.

Keep the report simple. When you present to the Executive or the Membership, don't overwhelm or confuse them with all

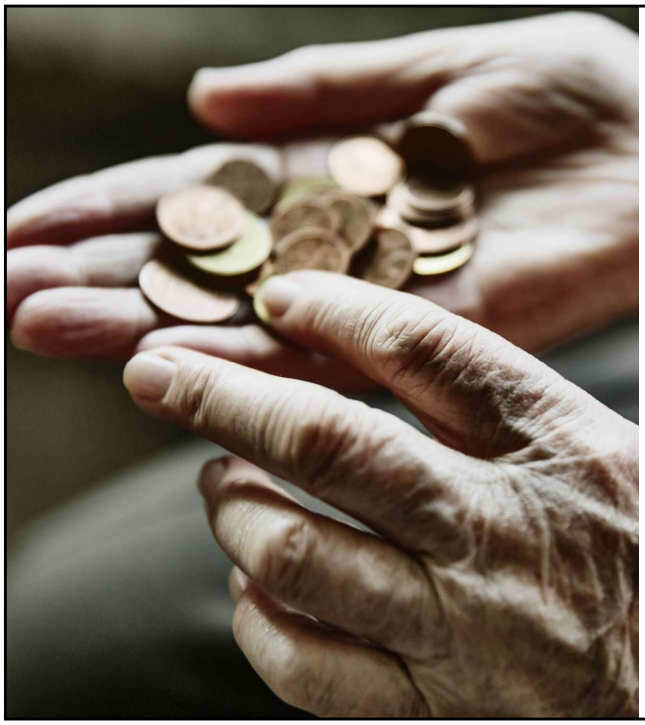
Give them the information they want

Then be prepared to answer questions – remember, don't be offended by questions, they need to know this stuff and you have the answers.

Treasurer's Report – the numbers

FINANCIAL SUMMARY	AMOUNT
Balance at last meeting	$_____
Money received since last meeting	$_____
Money spent since last meeting	$_____
Current bank balance	$_____
Outstanding bills/commitments total	$_____
Available balance	$_____

Provide handout: VOLUNTEER TREASURER'S ROLE



What people usually want to know:

- Do we have enough money?
- Do we need to fundraise?
- How much has been spent?
- Are we doing what we said we wanted to do with the money?

Do we have enough money? (what came in) – see bank statement

How much has been spent? (what was paid out) - see bank statement

Are we doing what we said we wanted to do with the money? (compare to your budget/plan)

Tools to use:
Bank statements– bring each to a meeting and have someone sign off to show that it was shared.
Treasurer's Report

COMPARATIVE STYLE REPORT

Group Name

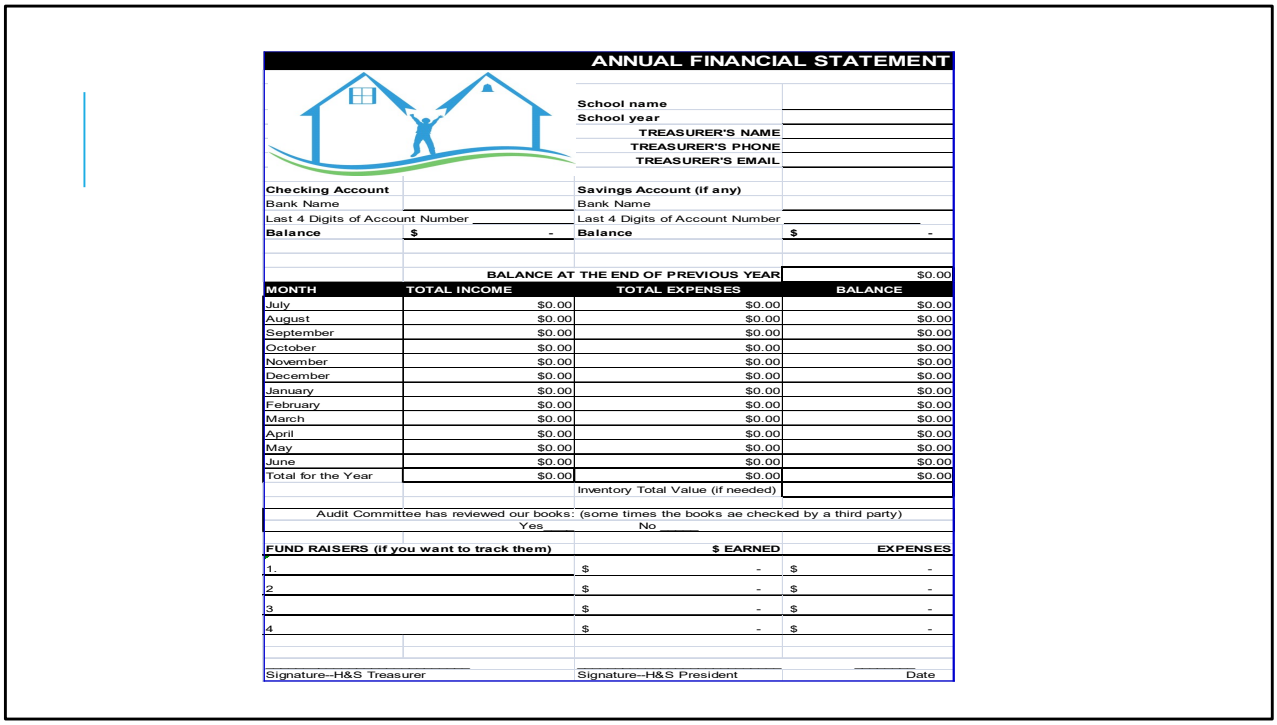
	To Date	Budget	Difference	Percent Difference
Income				
Fundraising				
Grants				
Donations				
Total Income				
Expenses				
Fundraising supplies				
Project 1 (Playground Upgrade)				
Project 2 (School Trip Assistance)				
Project 3 (Teacher Appreciation Day)				
Office supplies				
Home & School Dues				
Bank Charges				
Travel				
Misc				
Total Expenses				
Income minus Expenses				

Comparative Report – reports financial position at any time period from the beginning of the year accounting for:

- what came in
- what went out and
- are you on track?

Similar to Journal Style but connected to you PLAN (budget).

Difference helps track progress on this financial item – Are fundraising goals falling behind? Are expenses getting paid?



ANNUAL FINANCIAL STATEMENT

School name	
School year	
TREASURER'S NAME	
TREASURER'S PHONE	
TREASURER'S EMAIL	

Checking Account		**Savings Account (if any)**	
Bank Name		Bank Name	
Last 4 Digits of Account Number		Last 4 Digits of Account Number	
Balance	$ -	**Balance**	$ -

BALANCE AT THE END OF PREVIOUS YEAR	$0.00

MONTH	TOTAL INCOME	TOTAL EXPENSES	BALANCE
July	$0.00	$0.00	$0.00
August	$0.00	$0.00	$0.00
September	$0.00	$0.00	$0.00
October	$0.00	$0.00	$0.00
November	$0.00	$0.00	$0.00
December	$0.00	$0.00	$0.00
January	$0.00	$0.00	$0.00
February	$0.00	$0.00	$0.00
March	$0.00	$0.00	$0.00
April	$0.00	$0.00	$0.00
May	$0.00	$0.00	$0.00
June	$0.00	$0.00	$0.00
Total for the Year	$0.00	$0.00	$0.00
		Inventory Total Value (if needed)	

Audit Committee has reviewed our books: (some times the books ae checked by a third party)
Yes ____ No ____

FUND RAISERS (if you want to track them)	$ EARNED	EXPENSES
1.	$ -	$ -
2	$ -	$ -
3	$ -	$ -
4	$ -	$ -

Signature--H&S Treasurer ____ Signature--H&S President ____ Date

Electronic sample documents can be found online:
https://peihsf.ca/home-and-school-training/
Under **Financial Workshop**

Protect it - Handling Funds Safely

For your protection and for accuracy

- Never be alone with uncounted money
- Attach invoice or bill to cheques for signing
- Have bank statement reviewed and signed by another



Most problems and hard feelings within an Association occur around money issues – money not accounted for properly, money transferred between people without records of what happened, discrepancies over amounts.

To protect yourself as a money handler and to protect the Association's funds – here are few simple rules to keep everyone happier.

Never be alone with uncounted money

Have at least two people count the money together - for your protection and for accuracy

- If the money cannot be counted then and there – here is one protection method you can use:
  - place it in an envelope, seal it, and have a witness sign the seal to show that they saw you put all the money in the envelope, only open when you have two people to count it (the other should be a non-family member) and make sure they note on the envelope that it was still sealed.
  - Keep the envelope as evidence

Don't sign cheques without seeing an invoice or bill.

Show the bank statements at every Board meeting so everyone sees the real balance and have someone – other than Treasurer - sign the statement.



Do you have any other questions about tonight's information?

Group Conversation:

How do you find out about the concerns in our community?
What concerns are parents and guardians raising?
Where is your group getting bogged down?
What does your group already do well?

Staying Connected

- Who will track information and send annual report to th Federation?
- Attend Member Meetings: Semi-Annual and Annual
- Engage: awards, trainings
- President's Report: Annual Deadline: Feb 19th



Who will track information and send annual report to the Federation?
Attend Member Meetings: Semi-Annual **(Oct 20, 2026)** and Annual **(April 10, 2027)**
Engage: awards, trainings
Report: Annual Report - **Deadline: Feb 19th**

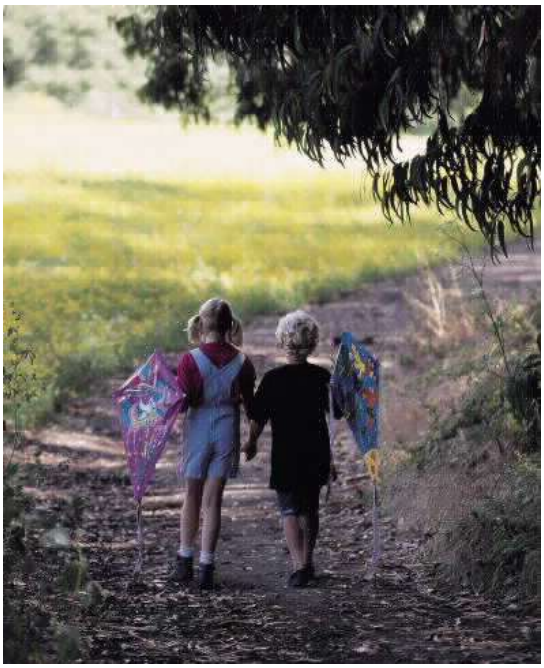
Reporting to the Federation is actually sharing with each other.
Local Associations report to the Federation so the Federation can respond to the needs of parents/guardians in your area

- If you need help, there is likely help out there! Someone has already faced your challenge and may be ready and willing to help you.
- Reach out to neighbouring Associations or contact Shirley at the office (she knows a lot about what other Associations have faced, addressed, and conquered!)

Your Navigator

Shirley - office resources

- 1-800-916-0664 (Toll Free)
- (902) 620-3186
- ssmedleyjay@gov.pe.ca



Let's look at where you can start building your support team.

Your NAVIGATOR:
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