

ONTARIO FEDERATION OF HOME AND SCHOOL ASSOCIATIONS, INC.



# HOME AND SCHOOL ASSOCIATION GUIDELINES

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## MISSION STATEMENT

The Ontario Federation of Home & School Associations (OFHSA), a province-wide network of dedicated members, is committed to informed and proactive involvement in our homes, our schools, and our communities to obtain 'The Best for Each Student'.

## RELEVANCE

One of the most important functions of an effective Home and School Association is to relate to its community needs with programs and projects that keep in mind the inter-relationships between the home, the school and the community.

## BELIEF STATEMENTS

### **Basic Belief #1**

*We believe parents/guardians are willing and active partners with those delivering education programs and services.*

### **Basic Belief #2**

*We believe Home and School at all levels is an advocate for the students in the public school system.*

### **Basic Belief #3**

*We believe co-operative and healthy environments in the home, the school and the community are necessary for the development of the student.*

### **Basic Belief #4**

*We believe local, provincial, and national parental networking is essential.*

### **Basic Belief #5**

*We believe effective communication is critical.*

## OBJECTIVES OF THE ORGANIZATION

1. To promote the welfare of children and youth.
2. To raise the standards of home life.
3. To promote the care and protection of children and youth.
4. To foster co-operation between parents and teachers, in the training and guidance of children and youth, both during and after the school period.
5. To obtain the best for each child according to his physical, mental, social and spiritual needs.
6. To give parents an understanding of the school and its work and to assist in interpreting the school in all its aspects to the public.
7. To confer and co-operate with organizations other than schools which concern themselves with the care and training of children and youth in the home, the school and the community; and with the education of adults to meet these responsibilities.
8. To foster high ideals of citizenship and to promote through educational means international goodwill and peace.

The infographic features a light blue background with white wavy lines at the top. It contains three blue boxes with white text, a white box with blue text, and a blue box with white text. The text describes the roles of different levels of OFHSA and provides a quote about membership and advocacy.

**Ontario Federation of Home and School Associations (OFHSA)**

- Works at the Provincial Ministry level to advocate policies
- Provides resource materials, leadership training, conflict resolutions to associations
- Offers a Conference for members and an Annual Meeting

**Home and School Council (*not School Council*)**

- Works at the Board level with the Trustees and Executive Council at the School Board
- Provides networking and co-operation efforts with their area and between associations

**Home and School Association (*at your local school*)**

- Works at the school level with Administration and School Council to advocate for "The Best of Each Student"
- Types of Memberships available Family, Individual, Associate
- Purchasing a Membership at an Association gives you a voice at each level of OFHSA

**Membership**  
*assumes that you are not giving your time or skills, but rather that you **choose** to spend your time, resources, skills and voice to the attainment of the mission. **Membership** is a statement of what you believe and who you are.*

*Karen Schieman,  
Princess Anne Association  
OFHSA Bulletin, Summer 2003*

**ADVOCACY:**  
*Members have a voice at all levels of government: regional, provincial and federal*

## RESPONSIBILITIES OF HOME & SCHOOL ASSOCIATIONS

- Identify and help meet the needs of the school-based community, identify school-related community issues and promote the advocacy work of OFHSA.
- Regularly review the school community's needs to ensure ongoing relevance
- Plan interesting learning opportunities to build members' knowledge of issues relating to the public school system
- Promote membership; aim for a good mix of members: parents, school staff, and community members.
- Ensure effective communication with members, and share mutual concerns/successes with the Home & School Council and the Federation.
- Ensure responsible handling of Association funds.

### **Association Executive Responsibilities:**

- Distribute electronic mailings, educational news and information, upcoming events, any other updates from OFHSA, your H&S Council or from within your Association to the membership and/or school community as appropriate
- Promote H&S within your school community
- Review your association bylaws every two years
- Use the OFHSA website as a resource
- Follow OFHSA guidelines for: **H&S Webpages; H&S and Social Media; H&S Associations and E-mail; Personal Information; H&S and the CASL** (Canada's Anti-Spam Legislation); and **OFHSA Electronic Voting Guidelines**
- Be familiar with **Executive Skills Handbook** and **Financial Practices for Home & School Associations** resource
- **Ensure all financial records are retained for 7 years**

### **Each year the following items are submitted annually to:**

See also: *Tips for Home and School Association Executives*

#### ***Federation***

- Association Executive Contact Information listing - Due Sept 1<sup>st</sup>
- Association Membership list (and updates as new memberships are sold) - Due Sept 30<sup>th</sup>
- OFHSA membership fees and the Association Insurance Fee - Due Sept 30<sup>th</sup> (forward new memberships as sold)

#### ***Home & School Council***

- Association Executive Contact Information listing - Due Sept 1<sup>st</sup>
- Association Budget - Due Sept 30<sup>th</sup>
- List of tentative meeting dates - Due Sept 30<sup>th</sup>
- Association Annual Financial Verification - Due Oct 31<sup>st</sup>

***\* If there is no Home & School Council serving your area, then forward all items to the Federation***

## PRINCIPLES AND RULES OF CONDUCT

The following principles and rules of conduct guide Home & School Associations within the Ontario Federation in reaching their objectives.

1. The Federation and its Associations shall only pursue enhancements to education that achieves the organization's objectives.
2. Membership shall be open to all persons age 18 years and over, interested in the welfare of children and youth.
3. The Federation and its Associations shall not interfere in the administration of any individual school, but shall, when necessary, make representations to the appropriate educational authorities, through the proper Home & School channels.
4. The Federation and its members may co-operate with other agencies or organizations having interests in common.
5. The Federation and its Associations shall be non-partisan and non-commercial; neither lending official recognition or support to an individual political candidate or partisan cause, nor endorsing any commercial concern or its product.
6. The Federation and its Associations shall only engage in fundraising activities that support the Federation's objectives.
7. The Federation and its Associations shall be a member of the Canadian Home and School Federation.



## ASSOCIATION BYLAWS

The Ontario Federation of Home and School Associations is incorporated under the charitable section of the Corporations Act. As such, there are bylaws for each level of OFHSA (Association, Council, and Federation). Every Home & School Association should have a copy of **OFHSA's Constitution and Bylaws**.

- The Constitution and Bylaws document contains the basic rules of operation for an association.
- OFHSA's Association Bylaws contain the following "Articles" within: **Organization** of an Association; **Membership** and **Fees**; **Executive Committee** set-up; **Duties of Officers**; **Meetings** (various types); **Election, Removal and Replacement of Officers**; specific **Association Bylaws**; **Association Life Members**; **Dormancy and Dissolution** of an Association; and **Suspension and Expulsion** of a member.
- Each Home & School Association must have their own individual bylaws, which must be approved initially by the Federation. Subsequent amendments may be approved by its Home & School Council, or in the absence of one, by the Federation.
- For further information and a standardized template for use by associations, see the **Association Bylaws** document.

## STANDING RULES (BEST PRACTICES)

Standing rules are informal procedural guidelines, established as needed by an Association to document practices that detail instructions for administrative practices.

- Standing rules are more flexible than bylaws.
- Standing rules generally relate to customs or traditions in the operation of an Association. (i.e. time of meetings; outline of procedure for conveying condolences)
- Standing rules generally are not adopted at the time an association is organized, but may be adopted by a majority vote at any Home & School Association business meeting when the need arises.
- Standing rules remain in effect until rescinded or amended, therefore they do not bind future sessions if a majority desires to suspend a particular standing rule temporarily for the duration of a session.

## OFHSA POLICY DOCUMENT

The **OFHSA Policy Document** lists all of OFHSA's member-voted policy statements. It is a summary of what our members believe in and have advocated for since inception. Each policy statement contains the year it was brought forth to members as a resolution to be voted upon.

## OFHSA PROCEDURE GUIDES & RESOURCES

OFHSA has many procedure guides and resources that you may reference as needed:

- *Home and School President's Guidelines*
- *Planning a General Meeting*
- *Influencing Public Decision-Making – Advocating*
- *Influencing Public Decision-Making – Electing a School Board*
- *Preparing a Resolution*
- *Preparing and Presenting a Brief*
- *Home and School Installation Ceremonies*
- *Parliamentary Procedures*
- *Brand and Visual Identity Standards*
- *Executive Skills Handbook*
- *Financial Practices for Home & School Associations*
- *Applying For Grants Using OFHSA's Charitable Registration Number*

## OFHSA ANNUAL MEETING

- All members in good standing may attend the OFHSA Annual Meeting. Each association is entitled to a specific number of voting delegates, which is determined by the association's membership numbers submitted to the OFHSA office as of Dec. 31<sup>st</sup> each year. Notice of the number of voting delegates is sent to associations each January.
- The president, or appointed alternate, carries one vote, representing the first 25 members of the association. Each additional 25 members entitle an association to an additional voting delegate, up to a maximum of seven.
- The OFHSA Annual Meeting is where membership fees, annual meeting minutes, resolutions, bylaw amendments, expiring action recommendations and other items on the meeting agenda will be voted on.
- OFHSA's Audited Financial Statements for the fiscal year will also be presented to the membership as well as updates on what OFHSA has been doing throughout the current year.



## HOME & SCHOOL ASSOCIATION MEETINGS

Refer to Association Bylaws, Article VI

### (a) Association Executive Committee Meetings

- Attended by the elected officers, appointed committee chairpersons, Home & School Council representative and the Home & School representative to the School Council. The principal and/or his or her delegate may be invited to sit on the executive committee.
- The number of executive committee meetings required is stated in the Association's Bylaws.
- All executive committee members should be notified of all meetings.

### (b) Association Meetings

- Open to the public.
- Agenda and notice of meeting should be sent at least one week prior to the meeting date to the members of the association.
- Right of voting, nomination, and holding of office is limited to members in good standing.
- Member voting privileges commence 20 days after the purchase of their initial membership. Proxy voting is prohibited
- Associations should meet on a regular basis, according to their bylaws and the needs of the local association.
- Meetings should relate to the needs and interests of the community.
- An agenda ensures the best use of time available.

### (c) Association Annual Meeting

- Election of officers for upcoming year
- Ratification of the budget for the upcoming year
- Receiving of annual reports of elected officers and committee chairs.
- These reports may be prepared in advance for circulation to members.
- The minutes of the previous annual meeting are presented for approval.
- The association annual meeting should be held prior to the end of June. The new executive committee, as elected at the association annual meeting providing a quorum is present, shall take office at the end of June.

### (d) Special Meetings

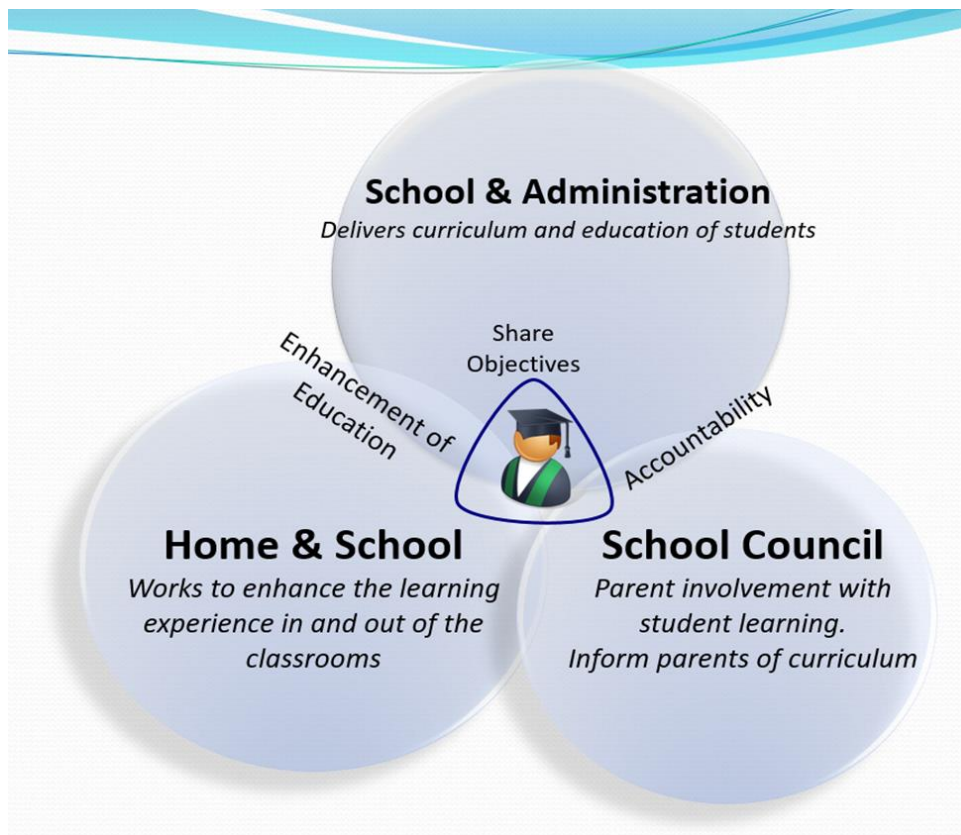
- Called in case of emergency.
- May include the executive or full membership, as required.
- May be called by the president when deemed necessary or upon the demand, in writing, of 10% of the members of an association. Only one voting member per OFHSA membership will be allowed to sign the request to call a special meeting.
- Such meetings should deal only with the specific business for which the meeting was called.

\*\*\* **Robert's Rules of Order** shall govern all meetings.

\*\*\* **Minutes** shall be taken for all meetings.

## SAMPLE AGENDA

- Call to order
- Approval of agenda
- Declarations – Conflict of Interest
- Approval of Minutes of previous meeting (read or circulated)
- President's report
- OFHSA correspondence/information
- Business arising from minutes.
- Treasurer's report/financial statements presented (received for information)
- New business
- Home & School Council Representative report
- Representative to School Council report
- Principal's report
- Other committee reports (i.e. Fundraising)
- Program, workshops, etc. (general meeting)
- Adjournment



## CONFLICT OF INTEREST

***A conflict of interest for an OFHSA member is any situation in which the individual's private interests may be incompatible or in conflict with his or her Federation, H&S Council or Association member responsibilities.***

An OFHSA member (at the Federation, H&S Council or Association level) may occasionally find themselves in a conflict of interest position in terms of an issue under consideration that would be of financial benefit to individual OFHSA members, thus influencing their decision. Keep in mind, a conflict of interest may exist whether or not a monetary advantage has been or may be conferred on an OFHSA member or his or her family.

### **A Conflict of Interest may be Actual, Perceived or Potential:**

**Actual:** When an OFHSA member has a private interest that is sufficiently connected to his or her duties and responsibilities as a member that it influences the exercise of these duties and responsibilities.

**Perceived:** When well-informed persons could reasonably believe that an OFHSA member has a conflict of interest, even where, in fact, there is no real conflict of interest.

**Potential:** When a Federation, H&S Council or Association member has a private interest that could affect his or her decision about matters proposed for discussion.

When this happens, OFHSA members have a duty to declare a conflict of interest (actual, perceived or potential) in relation to any meeting agenda.

### **Meeting Guidelines:**

1. "Declarations – Conflict of Interest" - standing agenda item (follows "Approval of Agenda")
2. The *member should declare* that they are in a conflict of interest situation
3. The member should not vote on any decision made on the issue

This provides an opportunity for a member to declare in advance, private interest in a specific agenda item, to refrain/absent themselves from any discussion of that specific topic, to allow the meeting to carry on and complete the business of that agenda item.

**A Federation, H&S Council or Association member should try to avoid situations in which a conflict of interest is likely to result whereas:**

- the member's ability to carry out his or her duties and responsibilities with the Federation, H&S Council or Association may be jeopardized;
- the Federation, H&S Council or Association member or his or her relatives gain or benefit indirectly;
- favours or economic benefits are accepted by the member from any individuals, organizations, or entities known to be seeking business contracts with the school, school board, the Federation, H&S Council or Association;
- any family member, friend, person, organization, or business entity associated with the member will be favoured or benefit.

*Conflict of Interest (COI) guidelines are intended to protect the integrity of the decision-making process  
Adapted: School Council, A Guide for Members; 2013 RR's Demystified*

## PARLIAMENTARY PROCEDURES – ROBERT’S RULES OF ORDER

Creating a motion to propose a new idea or action for the Association:

- allows for discussion of the idea by the members of the association
- calls for some action: investigate, develop, plan, post
- make a separate motion for independent actions
- identify the item called for action; specify the task
- specify who is tasked with that action: executive, member, etc.
- define a timeline for completion or action review
- define monetary requirements

<b>Type of Motion</b>	<b>Must be seconded</b>	<b>Can be discussed</b>	<b>Can be amended</b>	<b>Vote Required</b>
Privileged – (and incidental) Stops proceedings no matter what is before the assembly				
<b>Motion to adjourn</b>	Yes	No	NO	Majority
<b>Motion to Recess</b>	Yes	Length only	Yes	Majority
<b>Question of Privilege</b>	No	No	No	Majority
<b>Point of order</b>	No	Chair & Mover	No	Chair rules
<b>Appeal Ruling of Chair</b>	Yes	Yes	No	Majority
Subsidiary – Determines the immediate fate of a motion before the assembly				
<b>Table of Motion</b>	Yes	No	No	Majority
<b>To call for a vote</b>	Yes	No	No	2/3
<b>Refer to a committee</b>	Yes	Yes	Yes	Majority
<b>Amend a Main Motion</b>	Yes	Yes	Only once	Majority
<b>Withdraw a motion</b>	No	No	No	Majority
The Parliamentarian (who does NOT make decisions) is on hand to advise the chairperson and, when necessary, if asked by the chairperson or the assembly, to state the rule or give an interpretation of it.				
Unclassified – Refers to motions that need to be considered again.				
<b>Motion to Reconsider</b>	Yes	Yes	Yes	Majority
<b>Motion to Rescind</b>	Yes	Yes	Yes	2/3
<b>Take from the Table</b>	Yes	No	No	Majority
<b>Main Motion</b>	Yes	Yes	Yes	Majority

## MEMBERSHIP INFORMATION

- **Memberships are valid from October 1<sup>st</sup> to September 30<sup>th</sup>.** New members do not have voting privileges until 20 days after the membership is purchased. Renewing members continue with voting privileges.
- **Membership cards are provided free of charge from the OFHSA office.** Please contact the office to have cards delivered to the Association. Individual membership payment envelopes are also available.
- **The Federation membership fee for the coming year is determined annually** according to the financial needs of the Federation and ratified at the OFHSA Annual Meeting in April. Associations may charge more or less if they wish, but the ratified Federation amount per membership sold must be remitted to the OFHSA office.
- As per a motion brought forth at the April 2017 OFHSA Annual Meeting, each Association is now required to pay an annual **Association Insurance Fee of \$100** to cover the cost of the **Liability Insurance Coverage** for their members. OFHSA is charged per Association, not per member and must now pass this cost on to the Association. The *Association Membership List*, including full member names and contact information, must be on file at the OFHSA office in order to ensure liability insurance coverage. OFHSA's liability insurance covers members while involved in sanctioned Home & School activities.
- It is the responsibility of the Home & School Association to complete membership cards and lists when a membership is purchased, and to forward this information to the OFHSA office.
- Ensure the required member contact information is complete on the **Association Membership List**. The Association Membership List and fees must be remitted to the OFHSA office as collected. Memberships may be sold throughout the year and remitted as received.
- Memberships on file at the OFHSA office as of December 31<sup>st</sup> determine the number of voting delegates eligible to represent the Association at the OFHSA Annual Meeting. Memberships purchased after January 1<sup>st</sup> do not influence the number of eligible voting delegates.
- Please forward to the OFHSA office: the completed **Association Membership Summary** form; a copy of the completed **Association Membership List**, and an **Association cheque** for the fees collected plus the annual Association Insurance Fee.
- It is Home & School policy and a bylaw of the Canadian Home and School Federation that membership lists are not given to outside agencies for any purpose.

- OFHSA membership fees support the Canadian Home and School Federation, Home & School Councils, costs of representation at partnership tables, costs of advocacy, website maintenance and fees, and expenses of the OFHSA Board of Directors in order to provide services to associations and all members of OFHSA.
- A portion of OFHSA's revenue comes from membership fees. Other income necessary to fully finance the operation of the Federation is derived from Ministry of Education grants, and interest from the McLaughlin endowment fund.

For further information, see the **Membership Challenge** booklet. Membership information is sent to Associations in the August/September electronic mailing.

## OFHSA'S LIABILITY INSURANCE

- All members in good standing of OFHSA are covered by OFHSA's Liability Insurance policy while involved in activities related to their Home & School Association, Home & School Council or the Federation.
- Membership must be recorded in the OFHSA office to make insurance coverage effective. Associations must ensure full membership lists are submitted to the office.
- There is an annual Association Insurance Fee of \$100 per Association to cover the cost of Liability Insurance.
- The liability insurance coverage is limited to five million dollars.
- Types of activities covered: association and executive meetings, workshops, fundraising projects, school picnics, mall displays, leadership days and the OFHSA Conference and Annual Meeting. Without exception, each Home & School member is covered by this liability insurance and is protected from the financial impact of a lawsuit.

For more detailed information, see OFHSA's **Liability Insurance Coverage** brochure and the **About Liability Insurance Coverage** information sheet.

## COMMUNICATION WITH MEMBERS AND THE PUBLIC

H&S Associations may use social media platforms as versatile communication tools. There must be precautions taken when setting up online Home and School identities, see ***H&S and Social Media***, and some deal more with courtesy and responsible digital citizenship. Guidelines help maintain a respectful, knowledgeable interaction with people on the Internet. They also protect the privacy, confidentiality, and interests of the members and the organization.

### **H&S Councils using Social Media**

- Social Media accounts should have the President and Vice-President as administrators. If that is not possible, another member of the Executive can be an administrator to the account. Exceptions can be made if there are no executives who use Social Media, then a Social Media rep can be assigned. Any Social Media reps are also bound by ***H&S and Social Media*** guidelines set forth by OFHSA.

## LIAISONS

### **Between the Association and the School Staff**

- The principal should be the main contact between the association and the school. Good communication and collaboration is key for the success of the association. The principal may be a member of the executive committee.
- Before arranging meetings and/or projects to be held in the school, it is advisable to consult the principal re: school policy to ensure mutuality of goals.
- School board policy, re: use of school property, permit specifications, etc., should also be checked out.
- Association committees can benefit by teacher members to incorporate their viewpoints and suggestions thus ensuring a truly co-operative effort.
- The principal should be given an opportunity at each meeting to bring items of interest to parents relating to the school program, curriculum, etc.

### **Between the Association and the Home & School Council**

- Liaise with your Home & School Council for guidance and assistance.
- Attendance at Home & School Council meetings is vital to the success of the association and the Home & School Council.
- Both the president and the Home & School Council representative are the voting members from each association at Home & School Council meetings.
- All members of an association are welcome to attend Home & School Council meetings; the responsibility to report back to the association is that of the Home & School Council representative.

### **Between the Association and the School Community**

- The association newsletter should welcome regular contributions from the principal and his/her staff to increase understanding between teachers and parents and to build a climate where all work together to benefit students and their families. Alternatively, the association may request to be included in the school's newsletter.
- Contributions to the newsletter should also be encouraged from students and members, to reflect their point of view in the overall efforts of the association.
- All social media accounts should be open for the public to view/join; the site or app is the face of H&S, not a personal platform.
- All postings must support the aims and objectives of OFHSA.



## COMMUNITY AFFILIATIONS

**Community Response** - It is important that the Home & School Association be informed of, and sensitive to, the needs of the community, to set up viable and relevant programs and projects to fill that community's needs.

**Liaison with Allied Organizations** – Home & School Associations can foster closer liaisons at the community level with other organizations fostering mutual goals and working to a common purpose.

**Responding to Issues** – A Home & School Association is responsible and accountable to its total membership and any briefs or “feedback” submitted by an association should reflect the feelings and considerations of the entire group.

**Evaluating Issues** – Home & School Associations should investigate the validity of important local issues, directly or indirectly affecting the welfare of children, to provide responsible leadership while remaining within the framework of the Home & School Constitution.

**Controversial Issues** - After investigation and consultation with their Home & School Council or the Federation, such situations may justify calling a special meeting of the association to discuss the issue and its implications. An association should never risk incurring criticism for lack of leadership by refusing to take a stand on a controversial issue affecting the welfare of children and youth within its community.

**Representation** - The Home & School Association should present the coordinated findings of its members and their recommendations on any specific issues to that level responsible for implementation. The Home & School Council is charged with representation to the District School Board and OFHSA. The Federation then communicates to the Canadian Home & School Federation for ‘**A Voice at Every Level**’.

**School Councils** – With the passing of the Education Quality Improvement Act (Bill 160, 1997) each school in the province of Ontario must have a School Council. In each area of the province, School Councils will be different. Whether the Home & School and the School Council function separately or in some collaborative form is up to you. Good relationships with School Councils should be maintained. The Home & School mandate is broader than that of School Councils: Home & School deals with the same issues but can and should deal with more.

## ASSOCIATION AND FEDERATION AWARDS

Acknowledging and recognizing the significant contribution made by dedicated and long serving members is very important in a volunteer organization like OFHSA. Several types of recognition awards are available through the OFHSA office.

### Home & School Association Awards

- **Life Membership**

A Home & School Association wishing to honour a member for outstanding service to the association is entitled to confer a Life Membership in the association in accordance with the procedures established by the Federation. Life Members have the same privileges as any other member of that association. Family Life Membership may be conferred on a family by an association that wishes to honour a family for outstanding services.

- **Past-President**

An association may present a **Past-President's** pin to an outgoing president.

- **Volunteer Skills Portfolio**

Every member of OFHSA can register with the office and complete their portfolio to receive the *Ada Courtice Certificate of Leadership and Learning* along with a leadership pin.

### Federation Awards

- The **Col. R.S. McLaughlin Memorial Award** is presented to an individual member who has demonstrated outstanding service to education by fostering co-operation between parents and teachers and promoting understanding between the Home and the School.
- The **OFHSA Educator Award** is presented to an educator who has demonstrated in an exceptional way his or her support for parental involvement in education through the Home & School organization.
- Each year many students are presented with an **OFHSA Citizenship Award**. These awards are to recognize students who demonstrate exceptional qualities of leadership, congeniality and willingness to serve the community.

More information about these awards may be obtained from the OFHSA office, the Awards Workgroup Leader, the website and/or the ***Recognizing Outstanding Service*** brochure.