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Basic Information

The information in this Utah PTA Handbook has been compiled by Utah PTA to help local presidents carry out their responsibilities. Take time to read the handbook. It will help prepare you for your position.

- Read all materials you receive.
- Check the Utah PTA website often: www.utahpta.org
- Distribute materials to applicable Board members.
- Contact your Council President (or Region Director where councils do not exist) for assistance when needed.

CORRECT USAGE OF THE NAME

PTA (Parent Teacher Association) and PTSA (Parent Teacher Student Association) are registered service marks of the National Congress of Parents and Teachers and are registered in the U.S. Patent Office. National Parent Teacher Association is also a registered name, as is the National PTA and Utah PTA. Only organizations chartered by the PTA may use its name.

The official name of your local is (your school name) PTA or PTSA (for example, Main Street Elementary PTA or Main Street High PTSA). “PTA” or “PTSA” must be included in your name on all of your records and correspondence.

Note: Do Not Use Periods, Hyphens, or Small Letters

NOTE: When a Local PTA President leaves office before the end of his term, the Utah PTA Handbook should be given to the incoming Local PTA President.

The Utah PTA Presidents Handbook is updated each year.
Local PTA/PTSA Critical Information
At-A-Glance

8-Digit PTA Unit ID Number _______________________

EIN _______ - ____________________________

Bylaws Approval Date ______________________
(Above information is found on the front page of your bylaws)

Region # _______ Council Name _________________________________________________

Region Director ___________________________ Phone ______________________________

Email ______________________________________

Council President ___________________________ Phone ____________________________

Email ______________________________________

School Name ______________________________________

Principal Name: ___________________________ Phone ____________________________

School Address _______________________________________________

Email ______________________________________

My Board

Name ___________________________ Position ___________________________ Phone _________

Email ______________________________________

Name ___________________________ Position ___________________________ Phone _________

Email ______________________________________
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Name of Bank ____________________________

Bank Account # __________________________

Address ________________________________

Phone ________________________________

Authorized Check Signers:

______________________________

______________________________

______________________________
According to the PTA bylaws, all meetings shall be governed by Robert’s Rules of Order Newly Revised. In addition, all Board members shall:

■ Abide by all PTA rules and meet all PTA deadlines.
■ Ensure that the PTA database information (names, addresses, etc.) be for use of PTA Board members only. The confidentiality of hard copies and electronic copies shall be protected.
■ Attend all Board meetings and applicable Executive Committee meetings.
■ Notify the President as soon as possible if an emergency occurs and they are unable to attend a scheduled PTA meeting.
■ Arrive on time and remain to the conclusion of the meeting except in cases of individual emergencies.
■ Begin all meetings on time.
■ Be allowed a 10-minute break every two hours, returning promptly.
■ Remain in a meeting while in session.
■ Hold all but emergency calls. Leave the room to answer a call.
■ Turn all cell phones to off or vibrate.
■ Complete preparation before or after meetings, not during meetings.
■ Refrain from holding side conversations.
■ Direct all comments and questions through the chair.
■ Maintain professional courtesy at all times, including being supportive rather than judgmental, respecting differences of opinion, and listening to others’ ideas without prejudice.
■ Give feedback directly and openly in a timely fashion.
■ Acknowledge problems and deal with them as they arise.
■ Be prepared to present agenda items in a concise manner and focus on tasks and the process and not on personalities or hidden agendas.
■ Obtain missed information during breaks out of consideration of others.
■ Adjourn at the scheduled time, as per the printed agenda.
■ Dress to match the dress of those also attending a meeting when representing PTA.
■ Wear name badges when representing PTA.
■ Notify President of address, phone number, and email changes as soon as possible.
■ Stay at home out of consideration for the health of others if ill and possibly contagious.
Why Calendar?
1. Minimizes conflicts with other schools, council, region, school district, and community activities.
2. Gives time to plan effectively. Coordinate with principal and school calendar.
3. Allows for ample spacing of major events.

What do you calendar?

**Locals:**
Meetings:
- School Board
- Region
- Council
- Executive Committe
- Board (Local)

Needs assessment
Membership drive
Programs/Events for entire year
Fund raisers
General membership meetings
  a. Approval of audit or AFR report and budget by September 15
  b. Nominating committee election - before December 31
  c. Report of nominees - February or before
  d. Elections - March or before
  e. Approval and/or changes in bylaws
  f. Founders Day - February 17
Utah PTA Convention and Conferences
Annual Financial Reconciliation (AFR)
Reports due
Deadlines for Awards
Reflections

Region and/or council events
  a. Reflections
  b. Training
  c. President’s meetings
  d. Recognition programs
  e. Special conferences
National and/or State programs
Teacher appreciation

**Council/Region:**
Executive Committee meetings
Board meetings
Needs assessment
Trainings
Meetings with local Presidents
Reflections program
School Board meetings
Pre- / Post- convention orientations/trainings
District appreciation
Field service/leadership
Special conferences
Reports due
Deadline for Awards
Nominations
Elections
Annual Financial Reconciliation (AFR)

Where is this information available?
Utah PTA Website: www.utahpta.org
Council calendars
Region Calendar
School District Calendar
Community Calendar

National PTA website: www.pta.org
National PTA kits
National PTA *Our Children Magazine*
Year-Long Calendar and Time Line

Use this Calendar and Time Line to plan your upcoming year
Utah PTA Website Calendar will be updated regularly: www.utahpta.org

NOTES ABOUT CALENDAR:
- If something on the calendar says “due to council” and you are in a region with no council, submit to your region by date given.
- If you choose to incorporate activities into your schedule, adjust dates to your local school calendar as needed.
- Utah PTA dates are subject to change. Notification will be made online and to regions for distribution.

New Officer Transition Information

March
- Election of officers.
- Transition period from your election until June 30 begins now.

April
- Give all your contact information to the Council (region if no council) to be submitted to the Utah PTA: Name, Address, Phone number, Email address.
- Obtain a copy of your local bylaws from your outgoing president. Check the red stamp to see if they are current or if they need to be renewed. Bylaws are renewed every three years. (Note: For your PTA/PTSA to be eligible to participate in Reflections and other PTA programs, apply for Utah PTA Awards, and receive sales tax refunds, your bylaws need to be current.)
- Fill Board positions other than those which are filled by election. Local Bylaws (Article VII) will tell you the duties of elected officers. Local Bylaws (Article X) will help with commissioners and special committees.
- Meet with your new Board.
- Prepare your local PTA/PTSA directory with the above information about your Board to give to your Council President/Region Director. Contact information will be used for PTA business only.
- Attend Pre-convention Orientation meeting (if offered) and select classes that you and your Board will be attending at the annual Utah PTA Leadership Convention. (Convention for your new Board should have been budgeted for by the outgoing board.)
- Conduct needs assessment and set goals.

May
- Meet with your principal and PTA Board and start planning your calendar. Presidents are encouraged to develop a good working relationship with their principal. This is imperative to the success of your PTA. Remember you preside over the PTA and the principal, one of your PTA vice presidents, presides over the school. The president and principal work together for the welfare of students.
- Meet with the treasurer to begin the budgeting process.
- Do not assume office or sign any checks until July 1. The outgoing president is still President until June 30.
June
- Attend Utah PTA Leadership Convention. Take as many members of your Board as possible. The better they are trained, the better your year will be. Travel together to convention, eat together, and get to know each other.
- In June, July, or August attend region training as scheduled.
- Meet individually with the members of your Board to find out the vision they have for their position and year. Encourage them to have a committee under their leadership position.
- Pass outgoing Board member procedure books to the incoming Board members.
- Plan your membership goal.
- Remember PTAs raise money to exist—they don’t exist to raise money. When you plan your budget, plan what you will be raising money for. Don’t raise the money and then try to decide what to do with it.
- Request a Sales Tax Refund Request Form be filled out for January through June by the outgoing treasurer. (Alternatively, a refund request for January through December can be submitted in February.)
- Make sure an AFR (Annual Financial Reconciliation) is done before you accept the financial books.
- Work with your treasurer to change the names on your bank account signature cards, effective July 1.
- Prepare a thank you gift for your outgoing PTA president.
- June 30th – End of fiscal year.

Beginning of Fiscal Year

July 1st - Congratulations! You are officially the local PTA President!

July

Specific Due Dates:
1. Fiscal Year Begins / Change over PTA checking account signers
25. Membership money due to Utah PTA Council membership due (if applicable)

In General:
- Meet with your membership chair and plan your membership campaign.
- Remember: Membership is not a fund raiser. It is joining your local PTA, Utah PTA, and National PTA. Article V, Membership and Dues of your bylaws will tell you what your membership dues are. $1.75 of your dues collected go to Utah PTA. $2.25 go to National PTA. If in a council, your council dues amount is found in Article XI of your bylaws.
- Review previous year financial records with your treasurer and outgoing president. Ask them which IRS filing will be prepared. For fiscal year 2017-2018, if gross receipts are normally more than $50,000, Form 990EZ needs to be filed; otherwise, Form 990N is required. (If you receive anything from the IRS, do not ignore it. Call the Utah PTA Treasurer for assistance.)
- Obtain membership cards from your council (region if no council). You will need to put your National PTA Unit ID Number on each card. The ID Number is found on the front page of your local bylaws. Do not sign all your cards at once.
  Note: If you don’t know what your membership was last year, check with your council president, region director or call the Utah PTA office.
- If your school is not year-round, have the budget approved and AFR report adopted at your first general membership meeting (Back-to-School Night). Be sure to publicize this event.
- If your school is year-round, kick off your school’s membership campaign with your PTA Board and staff in July.
August

Specific Due Dates:

Legislative Action Committee (LAC)
** Check website calendar for exact dates
www.utahpta.org/calendar

1 Information due from Local to Council (Region if no Council): (Make a copy for your files)
- Year-end Financial Statement for previous year
- Annual Financial Reconciliation (AFR)
- Copy of completed 990N Form
- Sales Tax Refund Request Form (copied on YELLOW paper)

15 Information due from Council to Region:
- Council Summary of Year-end Financial Report and include:
  - Copy of Completed 990s
  - Sales Tax Refund Request–Council Compilation (copied on PINK paper)

25 Membership money due to Utah PTA and Council (if applicable.)

In General:
PTA Activities
Local Reflections Program

- At your first general membership meeting: present the prior year financial statement and AFR report for adoption, have your budget approved, introduce your PTA Board, introduce your theme for the year, let the parents know what PTA accomplished last year, and discuss your plans for this year (possibly on Back-to-School Night).
- Show the Utah PTA membership video.
- Start your membership drive and encourage volunteers to sign up.

September

Specific Due Dates:

Legislative Action Committee (LAC)
** Check website calendar for exact dates
www.utahpta.org/calendar

1 Information due from Region to Utah PTA:
- Council/Region Summary of Year-end Financial Report and include:
  - Copy of completed 990s
  - Sales Tax Refund Request–Region Compilation (copied on LILAC paper)

15 Information due from Local to Council (Region if no Council):
- Beginning of Year Information:
  - Incoming PTA Board List
  - Budget and Minutes of meeting where budget was approved
  - Signed Ethics/Conflict of Interest Forms
  - Proof of Insurance

25 Membership money due to Utah PTA and Council if applicable (25% of previous year’s membership postmarked by this date eligible to receive Back-to-School Membership Award.

In General:
PTA Activities
Local Reflections Program

Other Activities (Google for more information)
Patriots Day (National Day of Service and Remembrance – 9/11)
Green Ribbon Month (Health and Safety)
Fruit and Veggies-More Matters
National Childhood Obesity Awareness
Suicide Prevention Week
World Suicide Prevention day
International Day of Peace (Global Day)
Family Health & Fitness Day

- Have your School Board and/or Mayor sign the Proclamation (in membership section of this Utah PTA handbook) declaring September as PTA membership month.
- Utah PTA Resolutions Notification of Intent form due to Utah PTA by October 1. Form is found in Section 7 - Legislative - of this Presidents Handbook.
October

**Specific Due Dates:**

- Legislative Action Committee (LAC)
  
  **Check website calendar for exact dates**
  www.utahpta.org/calendar

- Budget must be approved by your general membership by this date (Article VII:5)

- Information due from Council to Region:
  - Council/Region Beginning Year Reports Form

- **Utah PTA Resolutions Notifications of Intent** form due to Utah PTA

- Information due from Region to Utah PTA
  - Council/Region Beginning Year Report form

- Utah PTA Advocacy Conference

- Military Family Essay due to Utah PTA

- Membership money due to Utah PTA and Council (if applicable)

- 2021-2022 National PTA Reflections Theme Search form due to Utah PTA office

**In General:**

PTA Activities

- Local Reflections Program

Other Activities (Google for more information)

- Bus Safety Month
- Red/Purple Ribbon Month (Drug and Violence Free)
- Crime Prevention Month
- National Book Month
- National Bullying Prevention Month
- Read for the Record
- Mental Illness Awareness Week
- Walk to School Day
- National Book Month
- National Health Education Awareness Week
- National Teen Driver Safety Week

- Begin collecting information for Report #1, which is due November 1. (See Presidents Handbook, Section 2 – Presidents Tools for information.)

November

**Specific Due Dates:**

- Legislative Action Committee (LAC)
  
  **Check website calendar for exact dates**
  www.utahpta.org/calendar

- Local, Council, and Region PTA/PTSA Report #1 is due

- Veteran’s Day Concert

- Resolutions for Consideration at Leadership Convention due to Utah PTA. Include **Utah PTA Resolutions Cover Sheet** found in Section 7 - Legislative - of this Presidents handbook.

- Membership money due to Utah PTA and Council (if applicable)

**In General:**

PTA Activities

- Council Reflections Program

Other Activities (Google for more information)

- National Military Month
- KUED Annual Reading Marathon Kickoff
- National Family Literacy Day
- National Family Week

- December 1 is the deadline to qualify for Reflections and other Utah PTA programs. In order to do this PTAs must have:
  - Current Bylaws
  - All membership dues collected remitted to Utah PTA.

- Must have nominating committee elected prior to December 31.
December

Specific Due Dates:
1 Remittance date for membership dues & bylaws renewals to participate in Utah PTA programs
11 Resolutions Committee Review meeting
25 Membership money due to Utah PTA and Council (if applicable)

In General:
PTA Activities
Region Reflections Program

January

Specific Due Dates:
Legislative Action Committee (LAC)
Held WEEKLY during legislative session
** Check website calendar for exact dates www.utahpta.org/calendar
15 LEAP Awards due to Council (Region, if no council).
16 Local PTA Award applications due to Council
22 Reflections due from regions to Utah PTA
25 Membership money due to Utah PTA and Council if applicable
28 First day of 2018 Legislative session

In General:
Other Activities (Google for more information)
Parents Empowered Month

- Begin collecting information for Report #2 which is due February 1.
- Legislative Session begins. You can follow all bills and PTA Resolutions and Positions that support the bills Utah PTA is following on the Utah PTA website: www.utahpta.org. Go to the legislative advocacy page. The site is updated weekly during the legislative session.
- Local and Councils are required, by their bylaws, to report nominations to their board 30 days before an election is held. Elections should be held in March.
February

Specific Due Dates:

Legislative Action Committee (LAC)

Held WEEKLY during legislative session
** Check website calendar for exact dates
www.utahpta.org/calendar

1 Local, Council, and Region Report #2 due
1 Information due from Local to Council (Region if no Council)
  • Sales Tax Refund Request Form (YELLOW paper)
1 Nominations for Utah State PTA positions due to Utah PTA
1 PTA Awards due from Council to Region
1 Arts Education Grant Fund Applications due
1 LEAP Awards due from Council to Region
15 Information due from Council to Region
  • Sales Tax Refund Request Form–Council Compilation (PINK paper)
17 PTA Founders Day
25 Membership money due to Utah PTA and Council (if applicable)

In General:

PTA Activities
Locals and Councils report nominations as designated by your bylaws

Other Activities (Google for more information)
Take Your Family to School Week
National Dental Health Month
Black History Month
Teen Dating Violence Awareness Month

■ Nominating Committee report of nominees should be made 30 days prior to election meeting.
■ Election of Local PTA officers must be held prior to March 31.

March

Specific Due Dates:

Legislative Action Committee (LAC)

Held WEEKLY during legislative session
** Check website calendar for exact dates
www.utahpta.org/calendar

1 Information due from Region to Utah PTA
  • Sales Tax Refund Request Forms – Region Compilation (LILAC paper)
1 LEAP Awards due from Region to Utah PTA
1 Membership Awards due from Region to Utah PTA
1 Local Battle of the Bands entries due to Multi-region chair
1 PTA Awards due from Region to Utah PTA
1 Membership Awards due from Region to Utah PTA
14 Legislative session ends
25 Membership money due to Utah PTA and Council (if applicable)

In General:

PTA Activities
Locals and Councils hold elections as designated by your bylaws

Other Activities (Google for more information)
National Day of Honor (Military)
White Ribbon Month (Respect)

■ Convention information distributed to all Board members.
■ Transition period begins (election until June 30.)
April

**Specific Due Dates:**
Utah PTA Reflections Awards Evening (TBA)
Legislative Action Committee (LAC)
** Check website calendar for exact dates
www.utahpta.org/calendar
1 Battle of the Bands Multi-Region winners due to Utah PTA
24 LAC (held at Utah PTA office)
25 Membership money due to Utah PTA and Council (if applicable)
27 Utah PTA Battle of the Bands

**In General:**
**PTA Activities**
Pre-convention orientation meetings held
Utah PTA Leadership Convention Registration begins

**Other Activities (Google for more information)**
Every Kid Healthy Week
National Child Abuse Prevention Month
Distracted Driving Awareness Month
National Volunteer Month

- Register incoming Board for Utah PTA Leadership Convention
- Give contact information of incoming PTA Board members to council (region if no council)
- Give incoming PTA president a copy of local bylaws

May

**Specific Due Dates:**
Legislative Action Committee (LAC)
** Check website calendar for exact dates
www.utahpta.org/calendar
Legislative Action Committee (LAC)
** Check website calendar for exact dates
www.utahpta.org/calendar
1 Utah PTA Resolutions – Notification of Intent form due to Utah PTA
22 LAC
25 Membership money due to Utah PTA and Council (if applicable)

**In General:**
**Other Activities (Google for more information)**
National Teacher Appreciation Week
National Mental Health Month
Screen Free Week
National Military Appreciation Month
Armed Forces Week
Armed Forces Day

- Begin wrapping up business for the end of the year.
- Help the incoming president with any questions.
June

**Specific Due Dates:**

1. Local, Council, and Region PTA/PTSA Report #3 due
2. Student Leadership Conference
3. Utah PTA Leadership Convention
4. Membership money due to Utah PTA and Council (if applicable)
5. Utah PTA Fiscal Year Ends
   - Books must be closed and preparation for Year-end financial reports begun
   - Year End financial statement
   - Annual Financial Reconciliation Report
   - 990 Form
   - Sales Tax Refund Request

**In General:**

- **PTA Activities**
  - Board transitions
  - Books closed pending Year End Financial Reconciliation

- **Other Activities (Google for more information)**
  - National Flag Week

- Outgoing president and treasurer review previous year budget with incoming PTA president and treasurer. Also discuss preparation by outgoing officers of IRS Form 990EZ or 990N, whichever is required. For fiscal year 2018-2019, if gross receipts are normally more than $50,000, Form 990EZ needs to be filed; otherwise, Form 990N is required. The 990 cannot be filed until after July 1.
- Have a transition (luncheon, dinner, meeting) where outgoing leaders pass the procedure books and PTA resource materials to incoming PTA Board members.
- Have treasurer fill out Sales Tax Refund Request Form due to council (region if no council) by August 1.
- Have treasurer work with incoming PTA president to change bank account signatures effective by July 1.
- Have executive committee appoint an auditor or elect an AFR committee and have the treasurer prepare the records for the AFR.
- No checks can be written after June 30 by outgoing treasurer.

July

- July 1 The incoming PTA president and officers officially take office.
- After July 1, File the 990N or 990EZ (send to Utah PTA office).

August

- August 1 Deadline for AFR to be completed and report to be given to the incoming president and treasurer.

Dates subject to change or To Be Announced
Don’t Re-invent the Wheel—Creating and Keeping a Procedure Book in PTA

One of the most helpful tools for a PTA volunteer is a Procedure Book. Maintaining a procedure book will provide helpful and useful information for each officer and/or chairperson. This information can then be passed from volunteer to volunteer each year and provides an invaluable resource. If you are a new volunteer and there is no procedure book for your position, now is the time to create one. The procedure book, which can be a three ring binder, should contain a record of work done and other helpful material that has been collected.

Include the following:

- A copy of the local bylaws form, found in the Bylaws section of this Handbook given to each President.
- Standing rules. All PTAs should have these; they contain job descriptions and more detailed information about conducting the business and directing the activities of your PTA.
- The annual budget, especially the budget for your activity or project.
- PTA calendar for the year.
- Materials from workshops and convention.
- Job descriptions that are updated regularly for easy reference. Refer to your standing rules, this Presidents Handbook or to specific handbooks provided at the PTA office or on the hard drive provided to PTA Convention attendees.
- Agendas, minutes, financial reports, and all other reports.
- A list of the officers, chairmen, and committee members’ addresses, telephone numbers, and e-mail addresses.
- A list of resource people and organizations. Include addresses, phone numbers and e-mail addresses.
- Special information relating to officers or chairmen and current work plans.
- Previous program correspondence and files for at least two years so that all officers can look back on their predecessors’ work as needed.
- All fliers, handouts, newsletter articles, announcements and other publicity and media tools.
- Copies of all receipts from the purchase of supplies or food for your particular project.
- A comprehensive list of supplies needed for the project and their location.
- A time line for the project, when to reserve things, order things, pick up things, how often to hold meetings, etc.
- A data disc or thumb drive containing all of the above information that was created specifically for this project.
- Very important—an evaluation of the project. What worked and what didn’t. What you wish you had done differently. Include the names of key people who helped you most or provided important and helpful information. It is always good to re-convene the committee to discuss this as a whole to get different viewpoints.

Procedure books are created to help a PTA run smoothly and provide each officer or chairman with a record of what has been done in the past. Remember the procedure book, as with all PTA materials, belongs to the association. Once a chairman or officer has moved out of a position, the procedure book should then be passed on to the next person filling the position.
Organize Your Board

Members of a local PTA/PTSA Board are either elected or appointed (check your bylaws).

Your Board members should:

- Have job descriptions and receive training.
- Be oriented about PTA Purposes, bylaws, policies, procedures, and financial management.
- Include representation from all areas of your school community.

**Elected**

President  
President-elect  
Secretary  
Treasurer  
Vice presidents—i.e. Leadership, Legislative, etc., including your Principal and Teacher (see Article VI; section 4 for number.)  
Commissioners—if your bylaws state they are elected (most PTAs/PTSAs appoint them)

**NOTE:** Nominations for these officers are presented by your nominating committee and are elected by your general membership.

**Appointed**

All other local Board members

May have commissioners over:

- Community Involvement/Volunteers  
- Education  
- Family Life  
- Individual Development/Reflections/Character Education  
- Health  
- Safety  
- Student Involvement/PTSA  
- Other positions as needed

**Could have appointees for:**

- Public relations/Director of Communications  
- Reflections  
- Membership  
- Fund-raising  
- Teacher appreciation  
- Newsletters  
- Engaging Minority Leaders  
- Special Needs  
- Military Families  
- Male Engagement  
- School Board Meeting – if the President cannot attend – another officer may represent your PTA and report on any pertinent information
Organizing Your Commission / Committee

This page is to help you identify the plan for your Commissioners and the people on your commission/committee.

Commission/Committee:

Commissioner/Chairman:

Areas of Concern:

Commission/Committee Members:

Teachers:

Students:

Parents:

Community:

Specialists:

Consultants: (Resource people)
Meeting / Project Planning Assignment Sheet

This page is provided as a guide for setting up a plan of work for projects.

Officers in charge: (assignments)

Committee:

Business to be conducted:

1.
2.
3.
4.

Presentations:

Publicity:

   Fliers
   Community Newspaper (press release)
   Posters
   Websites
   Other (PTA newsletter, local radio or television stations)

Physical Facilities:

Handouts:

1.
2.
3.
4.
Other:

Costs:

Evaluation:

Subject:

Letters:

School Papers:

Calls:
Agendas

An agenda is a written outline for a meeting, prepared cooperatively by the President, President-elect, and Secretary.

Include:
1. Call to order
2. Opening ceremonies (reverence, Pledge of Allegiance, etc.)
3. Reading and approval of minutes
4. Reports of officers, committees, etc.
5. Special business (financial reports, nominations, elections)
6. Unfinished business
7. New business
8. Calendar items
9. Adjournment

Minutes

Minutes are a record of all business transacted at each meeting of the association and of the Executive Committee and Board.

Include:
1. Name of the association and the meeting
2. Location of the meeting
3. Date and time
4. Name of person conducting and those taking part
5. A roll—present and excused
6. All action taken - “adopted” or “rejected”
7. A brief account of reports, including figures in the treasurer’s report
8. Time of adjournment
9. Place at the end for the signature of the secretary

What do I do with the minutes?
Read and approve all minutes
Keep a copy in a permanent record

Why do I keep the minutes?
Possible IRS audit
To document programs and procedures
To document bylaws and budgets

How long do I keep minutes?
These are permanent historical records

Where do I store the minutes?
Most PTAs have a place at the school for permanent historical records
Materials

Materials to have on hand for reference at meetings:
1. A copy of your bylaws
2. A copy of your EIN and PTA Unit ID Number, which are on the first page of your bylaws
3. A copy of your school/district policies
4. Minutes of previous meetings
5. Treasurer’s reports
6. A copy of the approved budget
7. Directories
8. Region and council information - copies for Board members
9. Roster of membership
10. Our Children - share link with Board members so they can sign up to receive information
11. Calendars (school district, region, council, local school)
12. Handbooks (National PTA and Utah PTA)

Meetings

Executive Committee Meetings
Board Meetings
General Membership Meetings

Utah PTA Leadership Convention
Region Meetings - if your region has councils, this may be by invitation
Council Meetings
School Board Meetings
Advocacy Conference
PTA Day at the Capitol

Note: Contact your local school district office and ask to be put on the mailing list to receive Board meeting agendas.
Utah PTA Meetings Defined

Utah PTA Leadership Convention
- Convention held annually in May to train, inform, receive resources, and network.
- Business and Resolutions Meeting where resolutions and bylaws amendments come forward to be voted on by the delegates. Filing date for Intent of a Resolution is October 1, and the deadline for a completed resolution to be considered is November 15. (Resolutions are submitted to Utah PTA. See legislation section of this handbook).

Advocacy Conference
- A conference held in the fall to educate members about the issues and legislative process—including business and resolutions.
- Business and Resolutions Meeting where resolutions and bylaws amendments come forward to be voted on by the delegates

PTA Day at the Capitol
- Usually in February while the legislature is in session. A day to advocate for bills that the Utah PTA has been following which will affect children and youth.
- Lunch with the legislators. A time to have one-on-one conversations regarding legislative issues.
- Youth (PTSA members) attend and have separate meetings and usually have a mock debate.

Council Meetings
- Representation from your PTA is important. If you cannot attend a council or region meeting, please send another officer to represent your local PTA. This is your connection with Utah PTA. Your president-elect and principal also attend your council meetings.

Local PTA Executive Committee Meeting
When: Recommended monthly, prior to Board meetings
Who: Elected officers and others invited
What: Agenda would include the following:
  - Minutes
  - Financial report
  - Communications
  - Reports from commissioners and/or committees
  - Unfinished business
Parliamentary procedure is an orderly set of rules for conducting meetings of organized groups for the purpose of accomplishing their goals fairly. Use of parliamentary procedure ensures:

- Justice and courtesy for all
- Maintenance of order
- Consideration of one item at a time
- The rule of the majority
- The rights of the minority

Terminology

**Bylaws**—Specific rules adopted by a PTA that must be followed. Must be reviewed every three years for necessary amendments or renewal. Bylaws forms for local PTAs and councils are available in the Bylaws section of this handbook.

**Chair**—The presiding officer.

**Majority Vote**—At least one more than half the votes cast.

**Motion**—A formal proposal made to bring a subject before an assembly for its consideration and action. Begins “I move.”

**Quorum**—The number of members required to be present at a meeting, as set forth in the bylaws, in order that the assembly may transact business. The number can be found in your Bylaws Article IX, Section 8.

**Standing Rules**—Rules outlining procedures of the association which are not included in the bylaws and which must not conflict with the bylaws. They may be amended or rescinded at any time by a two-thirds vote, or if notice has been given, by a majority vote. They may be set aside, for one meeting only, by a majority vote.

Steps to Process a Main Motion

Member rises and addresses the chair or raises hand:

"Madam President."

Chair recognizes the member:

"The chair recognizes—"

Member makes a motion:

"I move that—"

Another member seconds the motion:

"Second” or “I second the motion."
The chair states the motion and opens debate:
   “It is moved and seconded that ... Is there any discussion?”

Chair recognizes members wishing to speak.

After debate concludes, chair puts the question to a vote:
   “The question is on the motion (The chair repeats the motion). Those in favor of the motion say aye. Those opposed say no.”

Chair announces the result of the vote and what action will be taken:
   “The Ayes have it, and the motion is adopted. We will (states action to be taken).” or “the Nos have it, and the motion fails.”

The chair continues with the next item of business in order.

Voting

General Consent:
   “If there is no objection, we will...(pause). Since there is no objection, we will—”

Voice vote:
   “As many as are in favor say ‘aye.’ Those opposed, say ‘no.’”
   “The ‘ayes/nos’ have it, and the motion is adopted/defeated.”

Rising vote (not counted):
   “Those in favor will rise. Thank you, be seated. Those opposed will rise. Thank you, be seated.
   “The ‘ayes/nos’ have it, and the motion is adopted/defeated.”

Methods of Amending a Motion

By striking out:
   “I move to amend the motion by striking out the word ‘Denver.’”

By inserting:
   “I move to amend the motion by inserting the word ‘Las Vegas’ after the word ‘Portland.’”

By striking out and inserting:
   “I move to amend the motion by striking out the phrase ‘$35’ and inserting the phrase ‘$50.’”
Leadership Development

You Are Accountable For:

- **Bylaws**—Are they current or is it time to renew? (Renew every three years according to the date on the red seal.) A copy of your bylaws is available from the council president, region director, or Utah PTA. Blank bylaws forms are found in the Bylaws section of this handbook.

- **Parliamentary Procedure**—Guide can be found in the President’s Tools section of this handbook. This is a helpful tool to keep order when conducting meetings.

- **ALL PTA Funds**—Are to be collected and deposited separately from personal and schools funds. No co-mingling of funds! Always have three people count the money and use the money counting sheet (found in the Treasurer Handbook.) Don’t leave money at school or take it home. Get a deposit bag from the bank and make night bank deposits when necessary.

- **Records/Minutes**
  - Any motions made at any of your meetings need to be recorded.
  - Copy of approved budget (including minutes of the meeting where the budget was approved) should be sent to your council president/region director.
  - Be aware of retention dates (how long to keep financial records).

- **Commission Programs and Activities**—Encourage commissioners to have committees serve under them to recruit more parents to be involved. This will prevent burnout of Board members.

- **Membership**
  - **Membership dues aren’t a fund raiser.** Send in by the 25th of each month to Utah PTA.
  - Inform parents and help them understand what they receive for the Utah PTA and National portions of membership dues in the Membership section of this handbook.
  - Continue membership drive throughout the year at SEOPs, Back-to-School Night, Parent/Teacher conferences, and all PTA events.
  - Have a membership database. Retain membership by keeping people informed.
  - Apply for Membership Awards in the Membership section of this handbook.

- **Awards**—Be aware of deadlines and apply in the Awards section of this handbook.

- **Nominating Committee**—Must be elected by December 31. President does not serve on the nominating committee but does give information and direction prior to the first nominating committee meeting (see Nominations section of this handbook.

- **Procedure Book**—Contains local Board information and duties of commissioners. President’s Tools section of this handbook.

- **All Reports**—Must be submitted online (3 times a year). Information on reports is at the end of this section.
Needs Assessment Information

The strength of a PTA depends on the support of the people it exists to serve. A needs assessment is a tool to help your PTA set goals which meet the needs of that group. It does take a little time and a lot of patience, but it is also the most important first step necessary to help your PTA Board members become effective leaders.

Groups To Survey—Parents, Teachers, Students, Administrators, Community

FOUR WAYS TO CONDUCT A NEEDS ASSESSMENT

1. Interview
   Person-to-person — Person-to-group — Telephone
   **Advantages:** Immediate response
   **Disadvantages:** Difficult to administer and tabulate
   Takes a lot of time

2. Questionnaire (most frequently used)
   Fill out at a school activity — Send home with child — Door-to-door
   **Advantages:** Easy to administer and tabulate
   **Disadvantages:** If they are sent home, you can expect only about 10% return.
   You still need to reach the members of the community who did not attend the school activity.

3. Online Survey
   Use online survey tools such as Constant Contact or Survey Monkey
   **Advantages:** Easiest to administer and tabulate
   **Disadvantages:** People usually need incentives to motivate them to take a survey. Offer to enter them in a prize drawing. For best results, make questions short and simple with boxes to click instead of text boxes that require typing in answers. This also leaves out parents that don’t have access to the internet or those for which you don’t have an email address.

4. Speaking Out
   Best used in small groups — Divide larger groups into smaller groups
   **Advantages:** Immediate response
   **Disadvantages:** More personable—people have a “buy-in”
   **Disadvantages:** Difficult to tabulate “group”
   Not all groups will be represented.

After you have tabulated the results of your needs assessment:

- Meet with your Board and review results.
- Set your goals and priorities together (include principal, who is a Vice President of your PTA).
- Identify 3–4 programs or areas of concern to address during the year.
- Publish the results for your members and other groups surveyed.

The people your PTA serves will support and participate with you when they have a part in the development of your goals.

YOU’RE ON YOUR WAY—HAVE A GREAT PTA YEAR!
Sample Needs Assessment

A Survey of Concerns About the Rearing and Education of Children and Youth In Our Area

Your PTA would like your help in deciding what it should do this coming year. We want to plan activities, including meetings, that will make a difference to improve our school, our community, and our homes in the interest of our children and our youth.

Please indicate by checking the three (3) most important areas of concern in each section that you think your PTA could work on next year. Please complete this survey by (date) ________________.

*NOTE: If this survey is completed online, include a text box for explanation of “Other.”

<table>
<thead>
<tr>
<th>Behavior of Children and Youth</th>
<th>Legislative</th>
<th>Family Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>_ Respect for authority</td>
<td>_ Lack of adequate funding for education</td>
<td>_ Parent education</td>
</tr>
<tr>
<td>_ Discipline in behavior</td>
<td>_ Too much time cut for professional development for teachers</td>
<td>_ Family education</td>
</tr>
<tr>
<td>_ Behavior toward others</td>
<td>_ Help for parents to be able to help children with new Utah Core Standards</td>
<td>_ Books/toys</td>
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<tr>
<td>_ Self-esteem</td>
<td>_ My Representative doesn’t represent me very well in how he/she votes</td>
<td>_ Human relations</td>
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<tr>
<td>_ Tardiness</td>
<td>_ I need a better understanding of how the legislative process works and how I can get involved</td>
<td>_ Open communication</td>
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<tr>
<td>_ Unnecessary absence</td>
<td>_ Other*</td>
<td>_ Pre-school</td>
</tr>
<tr>
<td>_ Clean language</td>
<td>_ Other*</td>
<td>_ Special needs</td>
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<tr>
<td>_ School violence</td>
<td>_ School violence</td>
<td>_ Internet safety</td>
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<tr>
<td>_ Bullying</td>
<td>_ Bullying</td>
<td>_ Other*</td>
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<tr>
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<td>_ Other*</td>
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<th>Education</th>
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<tr>
<td>_ What is being taught</td>
<td>_ Nutrition</td>
<td>_ Recreation</td>
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<td>_ Instructional methods</td>
<td>_ Healthful environment</td>
<td>_ Libraries</td>
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<td>_ Buildings</td>
<td>_ Dental care</td>
<td>_ Playgrounds</td>
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<tr>
<td>_ Administration</td>
<td>_ Alcohol, tobacco, drug abuse</td>
<td>_ Cultural arts</td>
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<tr>
<td>_ Qualification of teachers</td>
<td>_ Immunization</td>
<td>_ Existing programs</td>
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<tr>
<td>_ Home/school partnership</td>
<td>_ School lunch</td>
<td>_ Cultural arts</td>
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<td>_ Reading/literacy</td>
<td>_ AIDS</td>
<td>_ Patriotism</td>
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<td>_ Class size</td>
<td>_ Teen Suicide</td>
<td>_ Citizenship</td>
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<td>_ Energy</td>
<td>_ Other*</td>
<td>_ Other*</td>
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<tr>
<td>_ Legislation</td>
<td>_ Other*</td>
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<th>Home-School Relations</th>
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<tbody>
<tr>
<td>_ Parent/teacher conferences</td>
<td>_ Safe crossings</td>
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<td>_ Support of learning at home</td>
<td>_ Bicycle safety</td>
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<td>_ Parents visiting school</td>
<td>_ Safety hazards</td>
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<td>_ Trust between parents and school</td>
<td>_ Fire</td>
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<td>_ Report cards</td>
<td>_ Emergency preparedness</td>
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<tr>
<td>_ Other*</td>
<td>_ Safe schools</td>
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<td></td>
<td>_ Pornography</td>
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<td>_ TV</td>
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<td>_ Juvenile justice</td>
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<td>_ Shoplifting</td>
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<td>_ Vandalism</td>
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<td>_ Child abuse</td>
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<td>_ Violence toward others</td>
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<td></td>
<td>_ Other*</td>
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End of survey form.
Why Count Volunteer Hours?

Credibility of Our Association
PTA documents the number of hours its members are volunteering to verify that the members are carrying out our Purposes and mission.

Our Tax-Exempt Status
In order to maintain our tax-exempt status, we must be able to prove we are a volunteer association worthy of that status. Documenting the number of volunteer hours is one of the ways to do this.

Grant Fund Applications
When school districts, faculties, or PTA associations are applying for grant money, it is to the writer’s advantage to be able to include the amount of parent engagement. Documenting the number of volunteer hours is often required.

Legislature
PTA documents volunteer hours and uses them to inform Legislators about the high level of parental involvement in our association. Once a year, Utah PTA presents the Governor with a Presentation Check representing the monetary value of PTA volunteer hours for one year.

School Administrators
Superintendents and principals appreciate knowing how much actual volunteer time is spent by parents in their various schools and districts.

Business Partnerships
As schools and businesses seek to become partners to enhance the education of children, it is informative and helpful to them to know the actual hours of volunteer time spent by parents, students, and those participating from businesses.

Recognition
We want to recognize those who spend their time and energy on behalf of PTA. Documenting specific volunteer hours is meaningful individually, by school, by council, by region, and as a state. Showing appreciation for a job well done is always in order.

Record All Volunteer Hours
- Classroom volunteers. Have a recording procedure at school and be sure to orient school staff and volunteers on the procedure
- Planning hours/meetings
- Hours spent carrying out duties
- Hours spent at home on PTA-related matters by all Board members
- Baby-sitting hours for PTA
- Time spent driving to and from PTA functions
- Hours spent lobbying at the legislature
- Record your hours on Local Unit Report Form(s) which is submitted to council (region if no council) Information on Local Reports #1, 2, and 3 are at the end of this section).
<table>
<thead>
<tr>
<th>Date</th>
<th>Volunteer Name</th>
<th>Volunteer Phone Number</th>
<th>Event/Activity</th>
<th>Total Volunteer Time</th>
<th>In-kind Donations (Including Money Value)</th>
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Installation of PTA Officers

Newly elected PTA officers may be installed in a ceremony, but this formality is not necessary. (Terms of office are designated in the bylaws.) Each local PTA may develop its own installation ceremony, if it chooses to have one, or adapt a borrowed one.

If desired, create a handout with the Utah PTA Mission Statement (below) as a bookmark, in a frame, or on a card/magnet for each of the officers being installed.

Utah PTA will help every child realize his full potential and will:

- **Advocate:** Support and speak on behalf of children and youth, and
- **Involve:** Encourage positive involvement in all facets of a child’s life, and
- **Develop:** Assist in developing skills to raise and protect children and youth.

The Installing Officers:

- Region director will install the councils at Council meeting. Utah PTA will also come and install if requested.
- Council/Region will install local PTA officers.
  - As a local president you need to let the Council/Region know when you want them to come and install you. This can be done at your election meeting.

**Example Installation ceremony:**

- Have the outgoing officers and commissioners stand and thank them for their dedication and service to the children.
- Name each new officer and position in turn.

**Example for Local:**

- Will you each serve and unitedly work toward the fulfillment of Utah PTA’s Purposes and mission in the service of children and youth? Answer: “I will.”
- With a strong belief in your several abilities, with renewed hope for (name of school) PTA, I now declare you duly installed officers for (recite years to be served).

**Example for Council / Region:**

When you first became a PTA member, you showed you cared about children by choosing to join. Then as a local PTA Board member you showed your dedication to children by choosing to lead. You are showing commitment to work for the future of our children and PTA by choosing to serve. I know each of you will do your best to work for every child. onevoice.

The vision is to keep PTA strong - to ensure that those of you who accepted this opportunity to serve see the broad picture of what PTA can do for children - of what PTA is doing for children - of what PTA will do for all children.

My challenge to you is to keep children the focus of your PTA service. Remember to enhance parent involvement - in your homes, schools, and communities. Everyone must be willing to work for each child to reach his/her full potential.
May you enter upon your office with the steadfast purpose of serving as only you can serve. Do you accept the challenge and charge? Please signify by saying, “I do.” And do you members of PTA accept the challenge to work for every child, with one voice? Please signify by saying, “I do.”

It is my pleasure to declare you duly installed officers of the ________________________________PTA/PTSA 2018-2019.

If applicable, hand out the Utah PTA mission statement, ask them to read it often and to remember that they are serving the children.

---

Leadership Points to Ponder

"Treat people as if they were what they ought to be and you help them to become what they are capable of being."

- **Johann Wolfgang von Goethe**, German writer and polymath

"Keep dreams alive. Understand to achieve anything requires faith and belief in yourself, vision, hard work, determination, and dedication. Remember, all things are possible to those who believe."

- **Gail Devers**, three-time Olympic Champion in track & field

"People will forget what you said, people will forget what you did, but people will never forget how you made them FEEL."

- **Maya Angelou**, African-American poet, memoirist, actress, director, and civil rights activist

"Each of us must come to care about everyone else's children. We must recognize that the welfare of our children is intimately linked to the welfare of all other people's children. After all, when one of our children needs life-saving surgery, some else's child will perform it. If one of our children is harmed by violence, someone else's child will be responsible for the violent act. The good life for our own children can be secured only if a good life is secured for all other people's children."

- **Lilian Katz**, Professor of Early Childhood Education
Responsibilities of PTA Leaders

- Accept your position and contribute intelligently to Board discussion.
- Participate constructively at meetings.
- Know and adhere to PTA Purposes, mission, and bylaws.
- Study the structure of the PTA association.
- Become well informed in all areas of PTA programs.
- Follow National PTA and Utah PTA procedures.
- Meet deadlines and fulfill assignments promptly.
- Develop and strengthen leadership.
- Learn to delegate instead of doing it all yourself.
- Understand the value of training. Attend conferences, workshops, field-service trainings, and leadership convention.

Why Presidents Succeed

They:

- Remember to have only one agenda - the children.
- Make each member feel welcome.
- Help each member understand the association’s Purposes and mission statement.
- Have a positive attitude.
- Read the Bylaws and President’s Tools sections of this handbook.
- Attend all required trainings and meetings.
- Read all information received.
- Use and follow an agenda.
- Arrange activities in which all members can participate.
- Distribute material to appropriate officers or chairs.
- Delegate the work.
- Use the correct channel when they need help.
- Train on leadership skill needs of your Board.
- Build an effective PTA team.
- Create a climate of support and mutual respect where people feel they can contribute and grow.
- Include representation from all areas of the school community.
- Attend and encourage others to attend convention, conferences, and trainings.
- Remember to say, “Thank you. You did a great job.”
Problem Solving Pointers

■ Let people solve their problems - don’t take responsibility for others’ problems.
■ Most problems are best solved at the level at which they occur - that is where you start to solve the problem.
■ Avoid using a message that starts with “you.” “You have a problem” will cause others to be defensive.
■ Use “I” messages. “I have a problem. I don’t understand (name the problem). How can we work together to solve it?”
■ Identify the problem - be specific without assigning blame.
■ Allow that others may be having a bad day. Keep the discussion at the level of the problem. Take it seriously, not personally, and avoid making personal comments.
■ Solve only one issue at a time.
■ Make sure both sides of the issue are heard.
■ Listen carefully, wait, and give feedback to make sure you heard what the people are trying to tell you. Sometimes they just need to be heard.
■ Talk about different ways to solve the problem. Ask, “What would you like to see happen?” Then choose one or two that you both agree are the “best” solutions.
■ Make sure you have the same understanding of what the solution is. This is done with feedback. You might say, “Thank you so much for your time. I understand that (then repeat what you understand to be the solution).”
■ Ask positive questions and listen to the person. “What happened?” “What do you want me to do?” “What are the possible solutions?” Allow them to pause and think. They might come up with their own solution.

Conflict Management

Conflict in PTA usually revolves around three areas:
■ Individual conflicts
■ Problems relating to PTA activities
■ Group/individuals in opposition to PTA policies or positions

Some conflicts may be avoided when you are:
■ Knowledgeable
■ Familiar with bylaws
■ Following the policies of PTA
■ Informed about the issues
■ Sensitive to the rights of members
■ Able to avoid personality conflicts

Remember to: Listen to Understand
Agree to Disagree,
and Be Tolerant of Intolerance
PTA & School Community Councils Working Together

Trust Lands and School Community Councils

■ Take the opportunity to learn more about trust lands at the PTA Leadership Convention, PTA Day at the Capitol, and Utah PTA Advocacy Conference.

■ Be sure your PTA has representation on your School Community Council. If a member of your PTA Board is not currently an elected member of the Community Council, your Board can still have someone attend the meetings to provide input and participate on any sub-committees.

■ Join the “Utah School Community Councils” group on Facebook in order to receive information about Trust Lands and School Community Councils. You can also ask questions and share ideas with other SCC and PTA members in this group.

■ Have your Safety Commissioner work with your School Community Council to ensure students and parents are provided with education on safe technology utilization and digital citizenship. This is a new responsibility for School Community Councils under HB213. PTA has great resources which can help the school with internet safety and digital citizenship.

■ Have your Legislative VP and other Board members join the Member to Member Network by emailing the Utah PTA Advocacy Vice President Kara Sherman at Kara@UtahPTA.org. They will then receive important updates about Trust Lands and other legislative issues.

■ Work with your principal and community council chair to prepare an article for the PTA newsletter discussing the School LAND Trust program and how your school is using their School LAND Trust funds.

■ Write letters to your state legislators and other elected officials informing them of how the Trust Lands funds are being used in your school. Let them know of your support for the program.
School Community Councils
At-A-Glance

Why are schools required to have Community Councils?

The Utah State Legislature passed a law requiring every public school in the state to establish a School Community Council at the school-site level (Utah Code. Section 53A-1a-108). The law outlines membership, election procedures, and responsibilities of the councils.

Duties of the Council

In accordance with state law, “Each public school, in consultation with its local school board, shall establish a school community council at the school building level.” Each council shall:

- Develop a School Improvement Plan
- Develop a School LAND Trust Program
- Provide for education and awareness on safe tech utilization and digital
- Advise and make recommendations to school and district administrators and to the School Board when appropriate
- Create subcommittees and task forces as needed
- Communicate with parents at the school

School Community Council Guidelines

Each School Community Council consists of school employees, including the principal, and parents or guardians of students attending the school.

- High schools must have a minimum of six parents or guardians and four school employees, including the principal.
- Schools other than a high school must have a minimum of four parents or guardians and three employees, including the principal.
- Councils may be larger than the minimum, so long as there are two or more parents or guardians than school employees.

According to the law, all council members, except the principal, are elected. Employees vote for employees (majority vote), and parents/guardians vote for parents/guardians (majority vote of those voting in an election held at the school). In the event of vacancies, each group appoints replacement members from within its ranks.

When Community Councils were originally created, a parent or guardian member could not be employed at the school. Legislation passed by the 2006 Utah Legislature now allows a parent or guardian member to be employed at the school part-time, as long as their employment does not exceed an average of six hours per week.

All terms are two years in length, with the exception of the principal, who is an ex officio member with full voting rights. The terms shall be staggered so that no more than half the members stand for election in any
given year. Elected members may serve successive terms as long as they have a student attending the school or will be enrolled during the term of office. Once the council is in place, members elect a chair and vice chair. The chair must be a parent/guardian; the vice chair can be either a parent/guardian or school employee.

One week prior to each council meeting, the following information must be posted on the school website:
- Notice of the upcoming meeting, including the date, time, and place
- The agenda for the meeting
- A summary (minutes) of the previous meeting
- An agenda for the meeting must also be posted at the main entrance of the school at least 24 hours before the meeting

Required reports are as follows:
- The council’s proposed meeting schedule must be provided to parents
- A summary of the implementation of the previous year’s School LAND Trust Program
- A telephone number or email address where each council member can be reached directly

The required reports are to be posted on the school website, and each household with a student attending the school should be notified of the information or how to locate it on the website. This notification may be made by mail, voice-mail, email, registration packets and/or with report cards. A variety of ways may be used to insure that all parents are notified.

The School Community Council has full authority to carry out its responsibilities as outlined and defined in the law, as well as any additional responsibilities as determined by the local school board and district administration. The council does not have authority to make decisions that conflict with or run counter to Federal law, State law or School Board policy.

### School Plans Requiring School Community Council Involvement/Approval

<table>
<thead>
<tr>
<th>PLAN</th>
<th>CODE REF.</th>
<th>BOARD ACTION ON</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Improvement Plans</td>
<td>53A-1a-108.5</td>
<td>Develop and approve annually</td>
</tr>
<tr>
<td>School LAND Trust Program</td>
<td>53A-16-101.5</td>
<td>Develop and approve annually</td>
</tr>
</tbody>
</table>

**NOTE:** Most dates for school plan submission are determined by each district

Information to Consider at the First Meeting
- Elect officers
- Review school data, assessments, and demographic information
- Review current school plans
- Review budgets to accomplish current plans
- Review the role of the School Community Council in implementation of plans they have oversight of or involvement with
- Review district due dates of each plan and what the council must do for plans to be completed, voted upon, and submitted in a timely manner
- Calendar tasks and meetings to complete the work
- Discuss creating subcommittees; appoint members and determine their roles, as needed
- Assign tasks to council and/or subcommittees, as needed

Following elections, please remember to submit your school community council membership report at [www.schoollandtrust.org](http://www.schoollandtrust.org).
Rite of Passage

The Period of Transition between the Outgoing and the Incoming PTA Officers

One measure of good leadership is how well others have been prepared to continue the work of PTA. A sign of a good leader is not what you have done in your year but what is accomplished the year after. You want all the good things you have in place to continue and then be built upon by your successor. All things that are important are worthwhile. It takes a little planning, organization, sensitivity, and a great deal of positive communication.

When does the “Rite of Passage” begin?

- Be sensitive to the fact that the PTA Board for this year still has a lot to accomplish. They still need support and encouragement.
- Sharing of information and materials should begin as soon as the officers are elected. Including the new officers in final meetings or activities can be very helpful in getting them “up and going.”
- Although the PTA year begins on July 1, assistance from outgoing officers may still be requested.
- Incoming officers will need to anticipate any activities taking place soon after July 1, doing some needed planning before that date.

Write It Down, Clean it out, Pass It ON

- Write it down - in a complete and organized procedure book.
- Clean it out - pass on all that is useful and throw the rest away. If in doubt, let the incoming officers make the decision.
- Pass it on - although you may be attached to some of the materials, pass all of it along, keeping copies if you feel you need them.

Support the New PTA Leadership!

- Back away—let new leaders gain confidence, try new ideas, improve on the past good work, and become stronger.
- Be available—Be a resource providing practical guidance and continuity.
Local PTA Reports #1, #2, and #3
How to file: Submitted by Local and Council Presidents and Region Directors

Due

Report #1 - November 1st
Report #2 - February 1st
Report #3 - May 1st

To file your report:

■ Go to www.utahpta.org
■ Log in (top right corner of page) or create a new account
■ Click on "Executive/Directors" from Menu bar
■ Click on "Regions VP"
■ Click on blue text that says “Please click here to find reports”
■ Click on the correct form, read the instructions, fill out the report, and be sure to submit it when the form is completed.

The Report program DOES NOT allow you to edit your report.

** SEE next page for MORE information on reports BEFORE you file**

Make sure to choose the correct LOCAL REPORT. Do not choose the Council Reports or Region Reports.
Information About Reports

Specific Information:
- The Employer Identification Number (EIN) and Local Unit # are found on the front page of your Bylaws. If you need a copy, ask your Council President or Region Director. You can also contact the Utah PTA office for a copy.
- The Number of members is year-to-date.
- Volunteer hours are for the Report period only, NOT year-to-date.
- Know the answers to questions on the report form (i.e., bylaws, dues, finances) The questions asked on the report are listed below.
- After your report is submitted, you and your Region Director will receive a copy of it by email.

Following is a list of the questions you will see on the report to assist you in gathering information so you are prepared to fill in the entire report when you begin.

List of Questions on Reports

REPORT #1
Due November 1

Local PTA Information
- Name of Local PTA
- Council name
- Region #
- 9 Digit EIN Tax Exempt #
- 8-Digit Local PTA ID #

PTA President
- President’s name
- Address, city, state, zip
- E-mail

Members and Volunteers
- Number of paid members to date
- Have all membership monies been remitted to Utah PTA?
- Number of Board members
- Have all your Board members paid their PTA membership dues for your specific PTA?
- Have you turned in your Board list to your Council President or Region Director?
- Volunteer hours from July 1st through October 31st

Needs Assessment and Goals
- Did you use a needs assessment to set goals for your PTA?

Bylaws
- Are your bylaws current or have they been submitted for renewal to Utah PTA?

Submissions to Council (Region if no Council)
- Have you submitted the following to your Council President or Region Director:
  - Year-end financial statement for the last fiscal year:
  - Annual Financial Reconciliation (AFR) report for last fiscal year
- IRS Filings
  - IRS filing for the last fiscal year (990, 990n or 990ez)
  - Approved budget for current fiscal year
  - General membership meeting minutes where budget was approved

Signed basic fiscal management procedures
Signed ethics/conflict of interest policy

Training
- Do you have PTA funds budgeted for convention/leadership training?
- Do you have money budgeted for insurance?
- What additional training does your local PTA need?

Meetings and Minutes
- Have you started your local PTA procedure book this year?
- Do you have regular meetings?
- Are you keeping minutes of your meetings?

Legislative Contact
- Do you have a legislative contact?
- Contact name
- Home phone
- Cell phone
- E-mail
REPORT #2
Due February 1

Local PTA Information
■ Name of Local PTA
■ Council
■ Region
■ 9-Digit EIN Tax ID #
■ 8-Digit PTA Local ID #

PTA President
■ President’s name
■ Address, city, state, zip
■ E-mail
■ Preferred phone number

Volunteer Hours
■ Volunteer hours from November 1st to January 31st

Membership Monies and Elections
■ Have all of the State and National portions of your membership monies been remitted to Utah PTA?
■ Total number of paid memberships
■ Has your PTA elected a nominating Committee?

Training
■ Have you attended Council or Region meetings to receive training this year?
■ Do you need additional help/training?
■ If yes, what additional training does your local PTA need?

Please describe successful activities/projects your PTA is doing
Is your PTA reaching out and including all neighborhoods/area/groups in your school community?

REPORT #3
Due May 1

Local PTA Information
■ Name of Local PTA
■ 9-Digit EIN Tax Exempt #
■ 8-Digit PTA Local ID #

Council and Region
■ Council
■ Region
■ Council President’s E-mail address

Incoming President Information
■ Incoming President’s name
■ Address, city, state, zip
■ E-mail
■ Phone number

Volunteer Hours
■ Total volunteer hours from February 1st to June 30th

Membership and Goals
■ Have all of the State and National portions of your membership monies been remitted to Utah PTA?
■ Have you conducted a Needs Assessment for the upcoming school year?

Audit and IRS Filing
■ Have you arranged for an Annual Financial Reconciliation (AFR) to be completed by August 1st?
■ Which IRS Filing is Your PTA required to file? (990, 990n or 990ez)

Which incoming PTA positions went to the Utah PTA Leadership Convention training in May?
■ President
■ President-elect
■ Treasurer
■ Secretary
■ Membership
■ Reflections
■ Other

From your needs assessment, what would you say is your PTA’s top priority?
Have your made arrangements to send our a Needs Assessment (Parent Survey) for the upcoming school year?

Please describe successful activities/projects your PTA is doing
Is your PTA reaching out and including all neighborhoods/area/groups in your school community?
Local PTA/PTSA President’s Checklist

☐ Obtain a copy of your local PTA bylaws from outgoing president and review with elected officers.

☐ Study local PTA bylaws. Are they current? (renew every three years) Check red stamp date.

☐ On your bylaws, locate your PTA Unit ID Number (for membership cards and Reflections), EIN (for banking purposes and IRS filings), and your membership dues information.

☐ Study Utah PTA President’s Handbook.

☐ Meet with your outgoing PTA president for helpful information and transfer of PTA materials.

☐ Meet with the outgoing treasurer to make name changes at the bank.

☐ Fill Board positions (other than those which are filled by elections) with appointees. Include representation from all areas of your school community and others concerned about children.

☐ Use your transition time (from election until July 1) wisely:
  ■ Meet with your principal
  ■ Plan your calendar year
  ■ Prepare budget
  ■ Prepare a needs assessment
  ■ Meet with your Board members individually and share visions
  ■ Meet with your Board to plan your year
  ■ Plan membership goals

☐ Make sure that you and all of your Board members understand their responsibilities, receive training, and sign the Basic Fiscal Management Procedures and Local PTA/PTSA Ethics/Conflict of Interest Policy (financial section of this handbook).

☐ Obtain procedure books from the outgoing Board members for your Board and update where needed.

☐ Find out if you are in a council. If you are, find out who your council president is, when she/he will hold meetings, and the amount of council dues. Council meetings are your link to Utah PTA. It is recommended that your president-elect and principal attend with you. If you cannot attend, you should send your president-elect or a representative from among your Board officers.

☐ Know what region you are in and who your Region Director is. Be aware of and attend any trainings or meeting held for Local PTA leaders at the region level.

☐ Conduct a needs assessment with your general membership.

☐ In consultation with your other officers, appoint a commissioner and/or chair to oversee each individual project or program identified from your needs assessment.
Assist the treasurer, with input from your executive committee and commissioners or project chairs, to prepare a budget for the coming year. Plan goals established as a result of the needs assessment. Make sure funds are available for leadership training.

Study this Utah PTA President’s Handbook and review report forms (three per year) for which you are responsible. Make a note of the due dates on your calendar.

Make sure the outgoing Treasurer has completed a year-end financial report and that the books are prepared for the Annual Financial Reconciliation (AFR). (The AFR must be completed by August 1.)

Receive a copy of the AFR and have the treasurer present it to the membership at the first general membership meeting of the school year.

Following the completion of the AFR, make sure that the appropriate IRS filing (Form 990EZ or 990N) is submitted to Utah PTA by the requested deadline. Do not submit 990s directly to IRS.

Attend pre- and/or post-convention trainings held at the Council or Region level. Attend Utah PTA Leadership Convention with your Board members. Make note of the workshops offered and bring committee chairmen accordingly, especially the Reflections chair. The fund raising chair should attend and pay particular attention to the vendors’ fair.

Study the Legislative section of the Utah PTA Handbook. Become aware of the annual Utah PTA Legislative priorities and attend all legislative conferences.

Meet on a regular basis with your principal, who is a vice president of your PTA. Remember he/she manages the school and you manage the PTA.

Attend all meetings where local PTAs should be represented, including district School Board meetings.

Meet with your Board at least once a month or when needed.
- Prepare an agenda for every meeting you conduct. Send it out one week prior to each meeting.
- Make sure volunteer hours are collected at each meeting.
- Have your principal report on school calendar each meeting.
- Start on time and end on time.
- Have treasurer report each month.

At the end of your term, show appreciation to your Board and volunteers.

At the end of the year, make sure the treasurer’s books are submitted for an AFR. The executive committee appoints an AFR committee (non-check signers) or auditor. (The AFR must be completed by August 1.)

Your term is from July 1, 2018–June 30, 2019. Transition is from your election through the end of June. (The books are closed on June 30.)

Have your Board sign the “PTA/PTSA Ethics/Conflict of Interest Policy” and the “Basic Fiscal Management Procedures” in this section. These are due to Council/Region by August 1.