

The logo for Utah PTA, featuring the word "Utah" in a bold, sans-serif font above the word "PTA" in a larger, bold, sans-serif font with a registered trademark symbol (®) to its upper right.

everychild.one voice.

administrative vp

2021 UTAH PTA HANDBOOK

HISTORY OF PTA

National PTA Fact | Utah PTA Fact

1897-1920

1897 The National Congress of Mothers founded by Alice McLellan Birney and Phoebe Apperson Hearst

1898 Utah Congress of Mothers was formed by Mrs. C. E. Allen, one of Utah's delegates to the National Congress

1905 Resolutions endorsed federal aid for kindergartens and elementary schools and recommended salary increase for teachers

1906 National Congress of Mothers Magazine (forerunner of *Our Children* magazine) first issued

1925 Utah joined the National Congress of Parents and Teachers

1935 Warm lunches were provided for 1,200 children who left home early and rode long distances in buses

1938 On May 15-20 the 42nd National Convention was held in Salt Lake City

1941 School lunch program inaugurated on nationwide basis

1951 Every school in Utah had a PTA

1952 Board recommended PTAs work for fluoridation of community water supplies

1956 Goal of 10 million National PTA memberships reached and library services bill, long advocated by PTA, signed into law

1958 National PTA Board formally authorized the use of PTSA (Parent Teacher Student Association) as a further incentive for student participation

1970 National PTA and National Congress of Colored Parents and Teachers united to serve all children and youth

1970 Critical Issues Conferences began – Now called Advocacy Conference

1981 National PTA sponsored Family Reading Week

1988 The 92nd National PTA Convention was held in Salt Lake City

1990 Utah PTA won every major award given at the National PTA Convention in Indianapolis

1992 Due to Utah PTA efforts, the Utah Legislature passed seven bills dealing with the management of the school trust lands

1994 Passage of School Trust Lands Management Act

1997 National PTA succeeded in getting content information included in TV ratings system

2000 National PTA Launched Building Successful Partnerships Program

2001 National PTA unveiled new logo and tagline "everychild. onevoice."

2006 National PTA launched Take Your Family to School Week

2007 Utah PTA became founding member of Utahns for Public Schools, promoting public education and fighting for repeal of voucher legislation

2016 Utah PTA was instrumental in the passage of Constitutional Amendment that increased and stabilized funds distributed to Utah schools from the permanent State School Trust Fund.

2018 National PTA passed Utah PTA Resolution "High Expectations for Students with Disabilities"

1921-1960

1961-2000

2001-Present

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Administrative VP

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Administrative VPs play a significant role in a successful PTA. As a member of the Local PTA Board, the Administrative VP working side-by-side with the PTA President and other officers create the “PTA culture” on that campus. Communication, planning and delivery of meetings, programs, and events will determine how members view the PTA’s relevance and value.

Evidence indicates that strong Administrative VP involvement makes a huge difference in a PTA’s longevity and effectiveness. Positive results are not accidents; they are the product of intentional efforts on behalf of the school staff and PTA volunteers.

It is critical for Administrative VPs to understand the roles of the PTA and its leaders, and likewise, PTA leadership must be respectful of the Administrative VP’s role. When everyone is clear that the Administrative VP works for the school district and the PTA is a 501 (c)(3) member-governed organization with its own bylaws, the work of the PTA will go smoothly while maintaining the most important focus – the mission.

The vision of “making every child’s potential a reality” can and will be achieved through a solid working relationship between the Administrative VP and PTA volunteers. Trust, respect, compromise, and transparency are key ingredients for the Administrative VP-PTA team which will ultimately produce a PTA that is the heart and soul of the campus.

Thanks to all of our Administrative VPs for what you do and for your support of PTA! We hope this handbook will help Administrative VPs under the work of PTA and how they help in that work. For more information about PTA, please visit www.utahpta.org

Correct Usage of the PTA Name

PTA and PTSA (Parent, Teachers, Students 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 are National PTA and Utah PTA. Only organizations chartered by the PTA may use its name.

DO NOT USE PERIODS, HYPHENS, OR SMALL LETTERS

For more information click here: [PTA Branding and Web Guidelines](#)



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Structure of PTA

Each PTA level has its own leadership structure. To see how to structure the elected and appointed positions of your local PTA, see section 2 of the President's handbook or the Utah PTA website, www.utahpta.org.

National PTA Board of Directors

President, President-elect, Secretary, Treasurer, Vice President of Membership, Vice President of Advocacy, Board of Directors, National Constituent Association Advisory Council (NCAAC), Nominating Leader Recruitment Committee (NLRC)

Utah PTA Board of Directors

President, President-elect, Vice Presidents, Directors, Secretary, Treasurer, Administrator & Teacher Representatives, Immediate Past-President, Commissioners, Region & Associate Region Directors, Board Specialists

Region Board of Directors

Region Director, Associate Director (where applicable), Assistant Region Directors, Superintendent(s), Secretary, Treasurer, if applicable

Council Board of Directors

President, President-elect, Vice Presidents (including Administrative VP and Teacher), Secretary, Treasurer, Commissioners

Local Board of Directors

President, President-elect, Vice Presidents (including Administrative VP and Teacher), Secretary, Treasurer, Commissioners

Over 120 Years Strong

For more than 120 years, National Parent Teacher Association (National PTA®) has worked toward bettering the lives of every child in education, health and safety. Founded in 1897 as the National Congress of Mothers by Alice McLellan Birney and Phoebe Apperson Hearst, National PTA is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education.

Today's PTA is a network of millions of families, students, teachers, administrators, and business and community leaders devoted to the educational success of children and the promotion of family engagement in schools.

National PTA Mission Statement

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Utah PTA Mission Statement

To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Utah PTA Vision Statement

To fulfill the mission, Utah PTA will:

- ♦ **Advocate** by speaking on behalf of all children and youth in schools, in the community, before governmental bodies, and before other organizations that make decisions affecting children.
- ♦ **Develop** programs, resources, and leadership skills that enhance the lives of all children, youth, and their families.
- ♦ **Engage** the public in united and equitable efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.

Utah
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Purposes of PTA

- ♦ To promote the welfare of children and youth in home, school, places of worship, and throughout the community.
- ♦ To raise the standards of home life.
- ♦ To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth.
- ♦ To promote the collaboration and engagement of families and educators in the education of children and youth.
- ♦ To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- ♦ To advocate for fiscal responsibility regarding public tax dollars in public education funding.

PTA Values

Collaboration: We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.

- ♦ **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- ♦ **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- ♦ **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- ♦ **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

Why be a PTA School?

Utah PTA is the largest volunteer child advocacy organization in Utah with over 675 local units and councils. Utah PTA is a partnership between parents, educators, students, and individuals who want to make a difference in the life of a child. Members of Utah PTA are also affiliated with millions of members of National PTA, an association that is actively involved in promoting activities and legislation that support the nation's public school children.

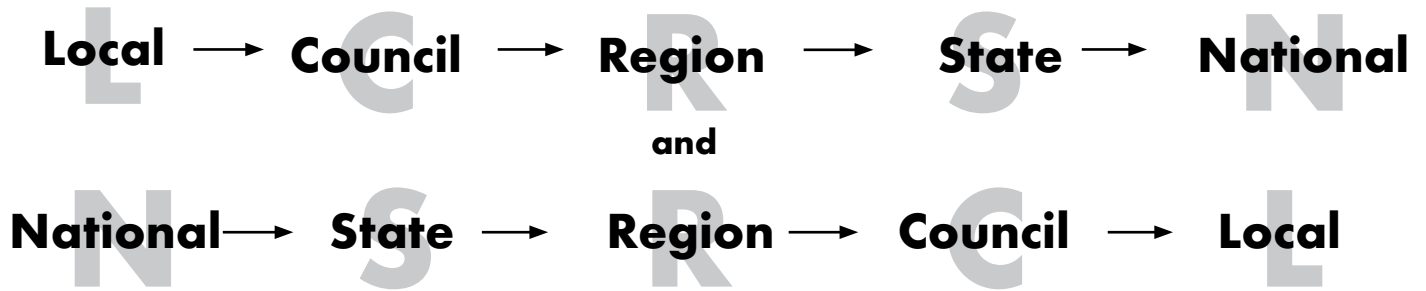
A PTA School:

- ♦ Is a member of the largest child advocacy group in Utah and the United States.
- ♦ Has only one agenda - ALL children.
- ♦ Functions under the umbrella of Utah PTA's 501(c)(3) with their own EIN for banking purposes and IRS filings.
- ♦ Functions under the umbrella of Utah PTA's Charitable Solicitation Permit, allowing them to fundraise and deposit fundraising money in their own checking account.
- ♦ Has leadership training available through the year for fully trained leaders.
- ♦ Networks with other PTA leaders throughout the district and state.
- ♦ Has bylaws to govern them.
- ♦ Has the support and training of Utah PTA and National PTA.
- ♦ Has access to resources and updated handbooks from Utah PTA.
- ♦ May participate in the PTA Reflections program.
- ♦ May participate in PTA Awards and any PTA program.

Utah PTA:

- ♦ Supports many of the National PTA programs and legislative efforts as they relate to the welfare of Utah's public school children.
- ♦ Participates in numerous committees, coalitions, conferences, summits, and programs for children and youth.
- ♦ Holds an annual Leadership Convention to train PTA leaders across the state as well as an annual PTA Day at the Capitol and Advocacy Conference to bring important grassroots issues to the membership.
- ♦ Provides valuable parent information through leadership trainings, various handbooks and emails. Utah PTA has programs for children and youth, including Reflections, Battle of the Bands, PTA Take Your Family to School Week, Teen Dating Violence Awareness and Prevention Week and more.
- ♦ The backbone is the organization of diverse volunteer members who donate millions of hours to benefit the children in local public schools.
- ♦ Advocates for all children in schools and districts, and by following bills that are supported by Utah PTA resolutions that originate from the grassroots—their members.
- ♦ Is the watchdog for Trust Lands money, making sure the monies keep flowing to the local schools and that all uses of the land benefit the children of Utah.
- ♦ Supports all public schools, including public charter schools.

PTA Line of Communication



Be a PTA Professional

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 the confidentiality of the PTA member contact information be for the use of PTA only.
- ♦ 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.
- ♦ Turn all cell phones to off or vibrate. Leave the room if you must answer a call.
- ♦ 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 PTA logo items such as name tags, badges, or attire 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.
- ♦ Set meeting guidelines and expectations.
- ♦ Give proper notice of meetings and deadlines.

Utah PTA Facts

Utah PTA is the largest advocacy association in Utah. Many individuals volunteer and participate at the Local and Council PTAs within the state.

Utah PTA divides the state into 20 geographic PTA regions, each served by a Region Director. In large districts, the Region Director works with area Councils. The Council President then works with the local school PTA President. In rural areas, two (2) or more school districts are under one (1) Region Director. Local PTA Administrative VPs meet on a regular basis throughout the school year with Council Presidents/Region Directors. Presidents-elect and Administrative VPs may also be included in these meetings. Local PTAs also meet on a regular basis throughout the year in Executive Committee and Board meetings and work with administrators, teachers, staff, parents, and students.

Utah PTA is an affiliate of the National PTA. National PTA is composed of 54 state congresses and more than 20,000 local units in all 50 states, the District of Columbia, U.S. Virgin Islands, Puerto Rico and the Department of Defense Schools in Europe. State PTAs are the liaison between the local PTA and National PTA, helping each to function effectively and to support and sustain the other. PTAs at the local level are valuable assets to their school communities by providing educational and parent involvement information, resources, events, and activities.

Utah PTA volunteers reported 1,201,761 hours of service to Utah's children in their local public schools in 2020. If this volunteer service were translated into monetary value, it would be worth \$31,486,138.20!

Utah PTA also has an exemption from sales tax from the Utah State Tax Commission. Every local unit in good standing qualifies for this exemption under the umbrella of Utah PTA. See the Utah PTA Treasurer Handbook for more information.

National and Utah PTA Programs

- Reflections
- Healthy Lifestyles
- School of Excellence
- Take Your Family to School Week
- Teacher Appreciation
- Battle of the Bands (PTSA) (Utah Only)

Conferences and Trainings

- Advocacy Conference (Oct)
- PTA Day at the Capitol (Feb)
- Leadership Convention (May)
- PTSA Student Leadership Conference (Sept)

Utah PTA Awards and Grants

- Utah PTA Awards
- LEAP Award
- Utah PTA Gold Star Awards
- Membership Awards
- Arts Education Grant
- Art Supplies Grant

Utah PTA Commissioners

- Community Engagement
- Education
- Family Life
- Health
- Individual Development
- Safety
- Student Leadership

Utah PTA Specialists

- Arts Grants
- Awards
- Bylaws
- Family Engagement
- Digital Citizenship
- Diversity & Inclusivity
- Male Engagement
- MemberHub
- Military Families
- Reflections
- Resolutions
- Special Needs
- Trust Lands

What are the National Standards?

The National Standards for Family-School Partnerships are voluntary guidelines to strengthen parent and family involvement on behalf of children in schools and other programs. The six standards and their quality indicators provide PTAs, schools, and communities with the components that are needed for highly effective family-school involvement programs.

PTA leaders and all those interested in more effective family/school/community connections will find the National Standards for Family-School Partnerships to be a valuable resource and catalyst for action.

1 Welcoming All Families Into The School Community
Families are active participants in the life of the school and feel welcomed, valued and connected to each other, to school staff and to what students are learning and doing in class.

4 Speaking Up For Every Child
Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

2 Communicating Effectively
Families and school staff engage in regular, two-way and meaningful communication about student learning.

5 Sharing Power
Families and school staff are equal partners in decisions that affect children and families, and together inform, influence, and create policies, practices and programs.

3 Supporting Student Success
Families and school staff continuously collaborate to support students' learning and healthy development, both at home and at school and have regular opportunities that will support their success.

6 Collaborating With Community
Families and school staff collaborate with community members to connect students, families, and staff to expand learning opportunities, community services, and civic participation.

Background

Our nation acknowledged the important role of parent involvement through its enactment of the 8th National Education Goal:

- ♦ Every school will promote partnerships that will increase parental involvement and participation in promoting the social, emotional, and academic growth of children.

Utah PTA supports this goal. The standards were designed to raise the level of expectation about how family-school involvement programs can improve student achievement and life success by engaging families in true partnership with educators and community leaders.

How Were the Standards Developed?

The standards were developed by the National PTA in collaboration with parent involvement researchers and other national leaders. They are endorsed by more than 30 professional education and family-school involvement organizations. The standards clearly delineate those practices that have been shown to lead to success and high-quality parent involvement programs. The standards were developed to be a practical tool for meeting the threefold purpose of the national standards which is:

1. To promote meaningful parent and family participation
2. To raise awareness regarding the components of effective programs
3. To provide guidelines for schools that wish to improve their programs

How Can My PTA Use These Standards?

Before you begin to develop new or improve on existing family-school involvement programs, form a committee or action team including all of the stakeholders—parents, teachers, administrators, support staff, and community leaders. Be sure everyone involved understands the group's purpose: to recognize the importance of parent and family involvement, review the standards, look broadly at current programs or practices at your school, and make recommendations about what steps are needed to initiate positive change.

Developing genuine collaboration is critical. The views of all stakeholders should be considered and valued and no one group should control the outcomes. Establishing trust and a true partnership will take time, but the extra effort is well worth the lasting benefits that can be gained. Meaningful change requires thoughtful, incremental steps. Laying a solid foundation can make all the difference in the final outcomes and success of your programs.

Creating an Action Plan

When parents, educators and community leaders make parent involvement a mutual goal, they can begin to work together as a team to create an action plan for reaching and maintaining the standards. Give each step adequate attention to ensure the overall effectiveness of your plan. Set realistic and achievable goals. Remember: Success Breeds Success. Accomplishing obtainable goals and then setting additional ones works better than reaching too high and trying to achieve too much in the beginning.

When implementing your action plan, consider local needs, priorities, and the demographics of your school and community. Involve those who will be instrumental in carrying out the plan to help develop the steps or procedures to implement it. This uses a bottom-up rather than top-down team approach which allows for greater support and cooperation from everyone involved.

Family involvement should not be seen as an “add-on” program feature, but rather as an essential component in the ongoing goal of improved student success. In order to be most effective, the family-school involvement plan should be fully integrated into the overall school or program improvement process.

Making Progress

Once the groundwork is laid and all stakeholders understand the value of the partnership, then redefining, reshaping and “scaling up” planned activities and goals maintains the momentum of program change. As noted, family involvement is a process, not merely a series of “one shot” activities or plans carried out and then retired. It is crucial that the standards be implemented in an ongoing pattern of planning, action, and evaluation on a consistent basis. Each measurable success fosters a pattern of continual, meaningful partnership.

Transformative Family Engagement

Parents know that they play an important role in their child's success. But traditional family engagement practices don't always meet the needs of each and every family, nor treat them as equal partners in ensuring their child's success. Family-school partnerships often focus primarily on academic success, but [whole child development](#) is also an essential part of the conversation.

The solution? Transformative Family Engagement.

Transformative Family Engagement is a shared effort of families, schools, and community leaders to advance programs, practices, and policies that empower every parent to make their child's potential a reality.

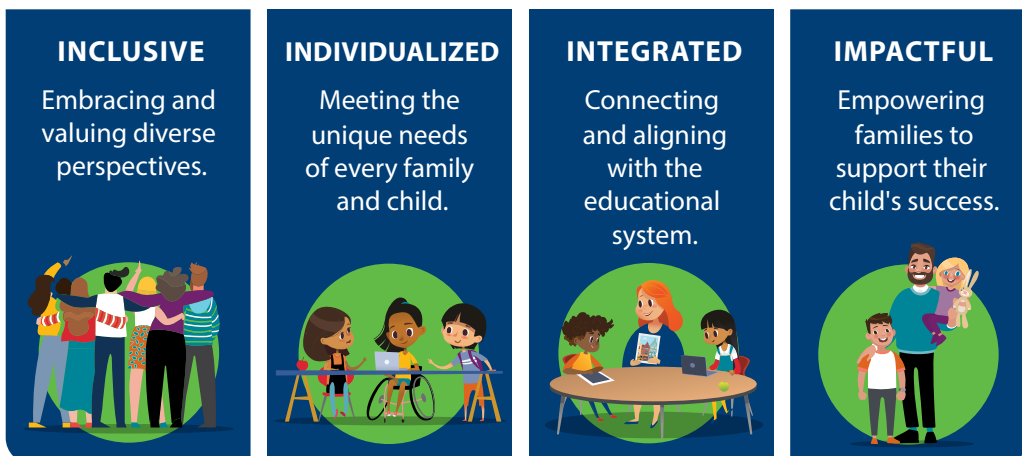
So, what does Transformative Family Engagement look like in schools and Local PTAs? Using research findings and best practices for family-school partnerships, we use the guiding principles of the 4 I's of Transformative Family Engagement—Inclusive, Individualized, Integrated, Impactful—with strategies you can use as a model to implement these principles in your school community.

The [Four 'I's of Transformative Family Engagement](#) outline how your PTA can become more inclusive, individualized, integrated, and impactful in its approach to family engagement.

For more information on how to implement the Four I's of Transformative Family Engagement with your PTA, visit: www.pta.org/center-for-family-engagement/four-parts-of-family-engagement



4 Principles of Transformative Family Engagement



Levels of PTA

- ♦ A PTA member is anyone who believes in the PTA Mission and Purposes and pays dues to a local PTA. Members are automatically part of National PTA and Utah PTA, joining over five (5) million members nationwide and 107,000 members in Utah.
- ♦ Local PTAs (PTAs at each school, of which there are approximately 600 in Utah) are the most important division of PTA. PTAs are organized and chartered by Utah PTA in accordance with authority granted to Utah PTA by National PTA bylaws. Leaders are nominated and elected for a one (1)-year term or a two (2)-year term and are allowed a maximum of two (2) consecutive terms.
- ♦ Councils consist of a varied number of Local PTAs within a town, city, school district, or other designated area and organized by authorization of Utah PTA. A Council is the coordination body that promotes communication and cooperation among Local PTAs and increases the capacity for service because of their unified strength. Council PTAs exist in most areas, but not all areas, within the state. Leaders are nominated and elected as in the local PTAs. Councils are the link between the Local and Region.
- ♦ Region PTAs are geographical divisions of the state designated by Utah PTA to carry on state work. Utah PTA is divided into 21 Regions in order to establish a closer working relationship with Councils and Local PTAs.
- ♦ A Region Director serves as the liaison between the local and/or the council and the Utah PTA Board of Directors and works with the Local PTAs where no councils are organized. They are nominated and elected and serve a two (2)-year term in office. They may be elected for two (2) terms. The Region Director holds meetings for the purpose of electing officers, conducting other business as needed, offering training, and providing networking opportunities. If Region membership is large, associate directors may be elected according to Utah PTA guidelines.
- ♦ Utah PTA serves as a link between the National PTA and the membership of Utah PTA. Utah PTA is administered by a President, a President-elect, Vice Presidents, a Secretary, and a Treasurer. They lead the Utah PTA Board of Directors which also includes Commissioners and Region Directors, each elected by the general membership for a two (2)-year term. Business is transacted by delegates at the Utah PTA conventions and meetings of the Utah PTA. The Utah PTA office, located in Murray, Utah, and under the general supervision of the President, is supported by a small staff that is responsible for the day-to-day administration of the Utah PTA office.

PTA at the state level serves two broad purposes. First, Utah PTA forms and supports local PTAs and Councils by providing services such as resources, training, inspiration, programs, field service, and guidance. Utah PTA also serves as the collective voice for children and PTA members at the state level by influencing decision-makers about proposed legislation and policy affecting children, collaborating with individuals and organizations working with children, increasing membership, and raising the visibility of the work of PTA.

- ♦ National PTA is a partner with Utah PTA in supporting Local PTAs and individual members. National PTA plays an integral role in establishing, maintaining, and safeguarding programs and policies that promote the health, safety, nutrition, welfare, protection, and education of children and youth. It serves as the collective voice of members at the national level.
- ♦ PTA at all levels is committed to being inclusive in its efforts to represent and assist all who nurture and educate children. Individual members may belong to one (1) or more PTAs and pay dues in each.

Each local PTA consists of three (3) levels: Executive Committee, Board of Directors, and General Membership. The following section provides information on each of these levels.

EXECUTIVE COMMITTEE

The Executive Committee consists of:

- ♦ Elected officers of the PTA, including President, President-elect, Secretary, Treasurer and Vice Presidents including the Administrative VP and teacher as specified in the unit bylaws

Duties of the Executive Committee

- ♦ Approves chairpersons and members of the commissions and the standing committees
- ♦ Approves the work plans of the commissions and the standing committees
- ♦ Schedules Board and association meetings
- ♦ Develops goals and a budget for the association for presentation to the Board of Directors and general membership for approval
- ♦ Makes a report of the Executive Committee action items at each Board meeting
- ♦ Select the Annual Financial Reconciliation (AFR) committee

Executive Committee Meeting

An executive committee meeting consists of the PTA Officers. Dates of these meetings are determined by the Executive Committee and announced at the beginning of the school year. Should there be a need, the PTA Executive Committee, or majority vote of the Board of Directors as outlined in the bylaws, can call a special meeting. The Executive Committee meets to set goals, and make recommendations to submit to the Board of Directors for approval.

Executive Committee Meeting Schedule

Generally, this group meets monthly and at least before every Board of Directors meeting to discuss any issues which may need to be addressed by the Board of Directors.

Administrative VP's Role

As outlined in the bylaws, the Executive Committee of the PTA consists of the officers of the PTA, which include the Teacher VP and the Administrative VP or a representative appointed by the Administrative VP to represent him or her. The Administrative VP or his/her designee is a member of both the Executive Committee and the Board of Directors. These are the leadership decision-making bodies of the Local PTA. The Administrative VP and PTA work together for the benefit of the school, communication being the key to the Local PTA's success. The Administrative VP runs the school and the PTA runs the PTA.

BOARD OF DIRECTORS

Board of Directors consists of:

- ♦ Elected officers, including the Administrative VP and Teacher VP
- ♦ Commissioners
- ♦ Chairpersons of standing committees (appointed)*

* Each Local PTA selects the number and title of the vice presidents and the committees needed at their school. However, Utah PTA has designated the following as leadership roles and commissioners:

- ♦ Legislation or Advocacy
- ♦ Leadership
- ♦ Public Relations
- ♦ Membership
- ♦ Community Engagement
- ♦ Education
- ♦ Family Life
- ♦ Health
- ♦ Individual Development
- ♦ Safety
- ♦ Student Leadership

From time to time, other special committees will need to be formed for specific functions and a limited time period, such as an AFR, nominations, or special event committee. Only members of the Local PTA shall be eligible to serve in elected or appointed positions.

Board of Directors Duties:

- ♦ Transact necessary business in the intervals between association meetings and such other business as may be referred to it by the association
- ♦ Create or dissolve standing or special committees
- ♦ Present a report at the regular meetings of the association
- ♦ Select an auditor or an AFR committee to reconcile the treasurer's books
- ♦ Prepare and submit a budget for the fiscal year to the association for adoption
- ♦ Approve routine expenses within the limits of the budget
- ♦ Fill all vacancies in offices, except the President-elect, who should be elected by the general membership

Please note that the Board of Directors does not have the authority to make or authorize expenditures that are not in the budget.

Board of Directors Meetings

The Board of Directors meets to make decisions and set goals that will then be brought to the membership for their approval.

Board of Directors Meeting Schedule

The Board generally meets monthly. Committee reports and issues are addressed at these meetings. The frequency of these business meetings is at the discretion of the local PTA and is not addressed in the bylaws.

Administrative VP's Role

Attendance by the Administrative VP at the Executive Committee and the Board of Directors meetings is critical to understanding the activities of the PTA and how these activities weave into the general school climate. The Administrative VP works to ensure that the PTA's mission and goals are aligned with the strategic plan of the school. The Administrative VP should give a brief report at each executive committee and Board of Directors meeting about school events, activities, status, etc. Administrative VP input is vital to the success of the PTA.

GENERAL MEMBERSHIP

Who can be a member?

Members should include parents, the entire school staff (including administrators), businesses, neighbors, and anyone who believes in the PTA Mission and Purposes. The general membership is all individuals who have paid dues to the local PTA for the current membership year.

Do individuals have to volunteer in order to be a member?

Participation level in the PTA will vary greatly from member to member. Volunteers are welcome and can be a tremendous asset to a school community, but being able to volunteer is not a requirement for membership.

Privileges of membership:

All PTA members:

- ♦ Can participate in all PTA/PTSA meetings
- ♦ Have a voice and vote at local, and may be delegate at, State and National PTA meetings
- ♦ Are eligible to serve as officers of a PTA
- ♦ Are members of Utah PTA and National PTA
- ♦ May receive leadership training
- ♦ Have a unified voice to influence legislation affecting children and youth
- ♦ Have the opportunity to work for the education health, safety, and welfare of children and youth
- ♦ Have access to National PTA's "members only" website.

Membership benefits:

PTA membership provides many benefits (some intangible and others tangible) to card-carrying PTA members. National PTA, Utah PTA, many Councils and Local PTAs offer a variety of member benefits to PTA members from businesses and organizations. Many of these benefits are seasonal or event-related, while others last for an entire membership year. It is important that all members regularly receive information about this expanding list of member benefits. Visit the Utah PTA and National PTA websites for more information (www.utahpta.org/come-play and www.pta.org/home/About-National-Parent-Teacher-Association/Benefits-of-PTA-Membership).

General Membership Meetings

What is a General Membership meeting and who should attend?

A general membership meeting is a meeting of all PTA members who come together to conduct PTA business. All PTA members are encouraged to attend these meetings.

When does the General Membership meet?

The number and months of the general membership meetings are outlined in the bylaws of the Local PTA. Utah PTA requires a minimum of three (3) general meetings per year.

Where do PTA meetings take place?

General meetings are normally conducted at the school. Most PTAs have their Executive Committee and Board of Directors meetings at the school as well, but some do conduct meetings off school campus.

Why do members meet periodically?

The general membership meets to hear recommendations from the local PTA leadership and to give approval or disapproval of the proposed recommendations. The PTA budget must be approved by the membership before any money can be spent. To improve membership attendance, it is recommended that the PTA sponsor an event or evening held in conjunction with the school. Only those who are PTA members have voting privileges at the general meeting.

Typical meeting agenda includes:

- ♦ Call to order
- ♦ Opening ceremonies (Pledge of Allegiance, flag ceremony, poem, song, or inspirational message)
- ♦ Reading and approval of minutes
- ♦ Report of the treasurer
- ♦ Letters or communications
- ♦ Report of the Board of Directors
- ♦ Reports of standing committees
- ♦ Reports of special committees
- ♦ Unfinished business
- ♦ New business
- ♦ Program (a program is not required at every meeting)
- ♦ Announcements
- ♦ Adjournment

During the appropriate times of the year, the following items should be included on the agenda and approved by the general membership:

- ♦ Budget
- ♦ Budget amendments
- ♦ Election of the Nominating Committee
- ♦ Election of officers

Administrative VP's Role

The Administrative VP's ideas and actions can play a significant role in setting the tone and shaping the environment of the entire school. It is partly through the Administrative VP's support, motivation, and leadership that a school community can promote strong parent-school-community partnerships.

The Administrative VP should be an active participant at the general PTA meetings. By modeling the expectation and being actively engaged in this vital partnership, parents, staff, and community will actively participate in the school to promote student achievement and provide a healthy, positive school climate.

PTA Bylaws

All PTAs are governed by the bylaws of the local PTA. The Administrative VP should be given a copy by the PTA leadership and be knowledgeable of the current bylaws.

The Bylaws:

- ♦ Are approved by the general membership and can only be changed by the membership at a general meeting, after proper notice is given
- ♦ Outline the basic policies and practices of the Local PTA
- ♦ Define the number of meetings and meeting months for the local PTA
- ♦ Outline the election of the officers and their duties according to the bylaws. (The Administrative VP is a member of the executive committee and therefore also a member of the Board of Directors.)
- ♦ Specify the dues of the Local PTA (as well as the portions to be forwarded to Utah and National PTA). Any dues increase for the Local PTA requires a bylaws change
- ♦ Can only be amended by the general membership

Administrative VP's Role

The Administrative VP is to keep a current copy of the approved bylaws in his/her PTA records and should be familiar with the bylaws. The bylaws require that the Executive Committee review the bylaws at the beginning of each school year, which assists members to adhere to them. Copies of bylaws can be downloaded at www.utahpta.org/bylaws.

Good Standing

For a Local PTA to be “in good standing,” it must be in compliance with National PTA and Utah PTA bylaws and guidelines, including the following:

- ♦ Adhere to the purposes and basic policies of PTA
- ♦ Have an EIN (Employer Identification Number) from the IRS on file with Utah PTA
- ♦ Submit the names and contact information of current officers to Utah PTA
- ♦ Have bylaws renewed by Utah PTA every three (3) years
- ♦ Remit national and state portions of membership dues to Utah PTA by dates designated (current procedure requires Local PTAs to make monthly remittances, by the 25th of each month, with a final remittance by March 15)
- ♦ Submit to Council or Region on paper or through MemberHub by August 1: Year-end financial statement (previous year), Annual Financial Reconciliation Report (AFR), copy of completed 990 Form, Sales Tax Refund Request Form
- ♦ Submit to Council or Region on paper or through Memberhub by September 15: Budget/budget approved minutes, signed Ethics/Conflict of Interest form, signed Basic Fiscal Management form, Proof of Insurance

If a Local PTA is not in good standing, neither the Local PTA nor students attending the PTA’s school are eligible to participate in PTA programs, such as Reflections or Battle of the Bands, or to receive awards. Sales tax refunds will not be issued to Local PTAs not in good standing, and Local PTAs that are not in good standing may be subject to loss of their tax-exempt status through Utah PTA’s group exemption.

Administrative VP’s Role

The Administrative VP should help the PTA Executive Committee understand the requirements to be “in good standing” and work with committee members to ensure all deadlines are met.

The Administrative VP & PTA

It is the responsibility of the Administrative VP to make parent engagement a school priority and create a school environment that welcomes parents and builds a strong home-school connection. The PTA serves as the Administrative VP's partner to achieve this objective.

Creating a Positive Partnership

The Administrative VP is a member of the Executive Committee and the Board of Directors. As such, he/she needs to attend all Board of Directors meetings to ensure that the administration and PTA are discussing plans together and that they are working to create a positive partnership.

What Does It Mean for the PTA and Administrative VP to Create a Positive Partnership?

- ♦ Communicating openly and honestly
- ♦ Understanding the roles and responsibilities of the other party
- ♦ Establishing goals and vision, working cooperatively for student achievement
- ♦ Respecting each other's opinions and input and not expecting automatic approval
- ♦ Actively encourage parents and staff members to get involved and reach out to every child, to enable every child to reach his potential
- ♦ Building positive community relationships to support school's and PTA efforts
- ♦ Commitment and building trust, working toward a common goal
- ♦ Working toward win/win: everychild.onevoice

Partnerships, teamwork, and cooperation are the building blocks of leadership in education. Effective partnership requires understanding the responsibilities and the roles of each participant. Parent involvement becomes a reality when there is strong support from the Administrative VP and when teachers build effective partnerships with the parents to strengthen their participation in the school community. The Administrative VP, the teachers, and the community are all team players, networking to make student achievement and parental involvement a reality.

The Administrative VP is the instructional leader within the building. The Administrative VP sets the tone, the climate, and expected professionalism for parent leaders and staff. The Administrative VP is a member of the PTA, works with the PTA to address issues, helps to develop parent involvement programs, and communicates with parents and the community through various communications such as the PTA newsletter.

The Administrative VP or his/her designee is a member of both leadership decision-making bodies of the Local PTA:

- ♦ Executive Committee (PTA officers)
- ♦ Board of Directors (PTA officers, commissioners and committee chairs, and Administrative VP)

The Administrative VP and the PTA work together for the mutual benefit of the school. The Administrative VP should encourage the school staff to become PTA members and support the work of the association.

The teachers are another important link between the PTA, the students, and the parents. A strong PTA has the support of the teachers as members of the association. Two-way meaningful communication between teachers and parents ensures that parents are full participants in all things relating to the students. (The term “teachers” also refers to the entire staff that interacts with students and parents. This includes but is not limited to: bus drivers, nurses, teaching assistants, secretarial and support staff, custodians, and food service employees.)

All community members are partners in educating children. The local fire and police, community businesses, residents who do not have school-aged children, and the parents all have a vested interest in nurturing tomorrow’s leaders.

What is the Administrative VP’s Role in PTA?

- ♦ Be available to the community. Schedule meetings open to the public at different times. Invite parents to set up appointments to discuss concerns.
- ♦ Work to make parents feel welcome and comfortable in school (the first step toward parent involvement).
- ♦ Plan for and encourage parents to attend parent-teacher conferences. Show parents and teachers how to use conferences to build parent-teacher-student teamwork, and make sure conference times are scheduled when parents can attend.
- ♦ Be sensitive to how the family home life may affect how parents feel toward school.
- ♦ Be active in the PTA and encourage teachers to become PTA members and to participate.
- ♦ Help the PTA keep its primary focus on education rather than fundraising. The Administrative VP and PTA can work together to solve problems and set goals that will benefit students.
- ♦ Help the PTA plan activities to accomplish specific goals (e.g. encourage the PTA to plan events promoting students’ well being, home-school cooperation and community improvement).
- ♦ Work with the PTA to develop a program for volunteer training, and use parent and community volunteers who can help enrich all areas of the school.
- ♦ Help parents stay informed on current issues in education. Refer parents to helpful books, magazine articles, radio or TV programs, and suggest materials to include if there is a parent resource center in the school, local library, or school counseling office.
- ♦ Recognize PTA volunteer efforts and appreciate the contributions of parents.
- ♦ Encourage constructive discussions with parents that build confidence in the school’s leadership and strengthen parent partnerships.

How Does This Partnership Begin?

While the Administrative VP sets the tone or climate for parent involvement, he/she can benefit greatly by working collaboratively with the PTA leadership to “walk the walk.”

- ♦ First and foremost, the Administrative VP should be a PTA member, an active participant of the PTA executive committee, and attend the Board of Directors meetings.
- ♦ Begin with open communication. The incoming PTA President and Administrative VP should meet prior to the end of the school year to establish the climate, goals, and shared vision for the next year.
- ♦ Be a part of the assessment of the PTA programs and activities of the previous year. Help your PTA to

identify strengths and weaknesses before developing a plan for the upcoming year.

- ◆ Assist the PTA in setting its goals and objectives for the upcoming year, aligning all programs and activities to support the school plan.
- ◆ Work with the PTA leaders to establish the criteria for programs, events, and/or fundraising activities. Help to ensure that these activities increase student achievement and align with the PTA goals and objectives as well as the school plan. Activities should be approved by the PTA Board of Directors.
- ◆ After each fundraising event, ensure that the PTA clearly communicates to the school community what the funds purchased and how the purchase supports student achievement.
- ◆ Communicate with parents on projects that are not fundraisers which are designed to help parents.
- ◆ Advocate for students, or support the school's plan for student achievement.
- ◆ Work with PTA to design a plan to educate parents on critical issues and to increase parent involvement in the total school program.
- ◆ Ensure that the school calendar of events is shared with the PTA and coordinate dates of the PTA programs and projects with the master calendar prior to communicating to the school community at large.
- ◆ Promote the benefits of PTA with the teachers and staff. Encourage them to become members of PTA.

Maintaining A Positive Working Relationship

When educators, administrators, and parents work together, they create a win-win situation for students. The PTA and Administrative VP must work collaboratively and be committed to support the education of all children. To maintain a positive working relationship, the Administrative VP and PTA should:

- ◆ Keep the primary goal of the PTA on education and advocating for students rather than fundraising. The goal is to benefit ALL students.
- ◆ Collaboratively plan activities with PTA to accomplish specific goals.
- ◆ Develop a program that trains parents in the policies and procedures of the school and school district, on current issues that impact the instructional program, on federal/state laws that impact the instructional program, and any other needed topic at the individual PTA.
- ◆ Meet regularly (monthly) to discuss issues and concerns. Review plans for events. Keep each other informed. Continually assess the year to date.
- ◆ Maintain open communication and solve any misunderstandings in a direct, honest way. Keep an open mind and, as Stephen Covey said, "seek first to understand, then to be understood."
- ◆ Be positive and enthusiastic about the school.
- ◆ Develop a win-win attitude and celebrate accomplishments.
- ◆ Keep things seen or heard in conferences or at school confidential. Encourage all volunteers to be sensitive to the ethical responsibilities regarding students and their privacy.

Administrative VP's Role

The Administrative VP should be familiar with a variety of available resources published by the Local PTA, Council, Utah PTA, and National PTA. The information contained is invaluable when working with staff and community members. Administrative VPs also have the opportunity to write articles for these publications that pertain to student achievement, parent involvement, and the vital role of PTA commitment in the overall success of the school.

PTA Trainings

Utah PTA, with its Regions and Councils, offers several workshops throughout the year. The Administrative VP, his/her appointed representative, teachers, and other staff members are welcome and encouraged to attend these trainings. PTA training is both a legitimate and priority expense. Every Local PTA should provide sufficient funds in their PTA budget to attend training and represent their members.

Information and guidelines are provided in handouts and through the various workshops to lead the incoming and outgoing officers in a smooth transition and also keep the Administrative VP “in the loop” of information or change. Leadership trainings are available from several sources, including but not limited to, PTA Councils, PTA Regions, Utah PTA, and National PTA.

What Leadership Development Opportunities Are Offered By Utah PTA?

- ♦ ***Utah PTA Leadership Meeting (May):*** Utah PTA encourages members to attend the annual Utah PTA Convention. Delegates participate in workshops and general sessions, vote on Board Members for the Utah PTA, network and celebrate the accomplishments of PTAs from around Utah. Local PTAs are strongly encouraged to attend.
- ♦ ***Business and Resolutions Meeting (held in conjunction with the Leadership Convention):*** PTA leaders and members have the opportunity to receive reports from Utah PTA officers and to vote on business, including bylaw changes and resolutions governing Utah PTA actions.
- ♦ ***Advocacy Conference (Fall):*** It is important for PTA leaders and members to build a year-long working relationship with state and local legislators and to understand both the issues impacting children and how education is funded in Utah. At the Utah PTA Advocacy Conference, members learn to be more effective advocates for children while participating in establishing the Utah PTA legislative platform.
- ♦ ***PTA Day at the Capitol (February):*** This is an annual event while the Utah State legislature is in session. PTA Advocacy Day at the Capitol provides PTA leaders, members, and supporters an opportunity to become more familiar with the legislative process and to actively speak with legislators about education and children’s issues.
- ♦ ***PTA University:*** Utah PTA has a library of recorded trainings that are available for PTA leaders to watch online. These trainings can be found at www.utahpta.org/university.

What Leadership Development Opportunities Are Offered By National PTA?

- ♦ ***National Convention:*** The National PTA Convention is held annually in late June in different parts of the country. Workshops, nationally known leaders and speakers, and an extensive exhibit hall are provided. Delegates from every level of PTA come together to conduct the business of PTA, celebrate and network.
- ♦ ***E-Learning:*** All PTA leaders and members can grow in their personal leadership skills from the comfort of home by taking advantage of the e-learning courses. Log on to the National PTA web site at www.pta.org/home/run-your-pta/elearning and participate in an e-learning course about team building, conflict management, grant writing, planning, goal setting, behavior styles, etc. Additional courses will be added regularly.

Administrative VP's Role

The Administrative VP should be aware of the trainings being offered and participate when possible. The Administrative VP should encourage training for PTA leaders at his school. The Administrative VP should also make recommendations to the PTA President regarding workshops that promote student achievement, advocacy, promote parent education and involvement, and encourage other staff members to attend or participate.

From time to time, a Administrative VP may feel that additional training might be helpful for the PTA's leadership beyond the regular offerings listed previously. In that case, he/she should contact the Council, Region Director, or the Utah PTA office for assistance.

Fiscal Management of a Local PTA

PTA Funds

The primary focus of the Local PTA should be the promotion of the PTA Purposes and the Mission. The real value of PTA lies in its members, not in its bank account. PTAs do not exist to raise funds; rather they raise funds to exist. Administrative VPs and PTAs should work together to determine what programs will benefit their students and improve homes, schools, and communities. Appropriate use of funds includes student-oriented programs in priority areas such as literacy, health, safety, parent/family involvement, and cultural arts, as well as advocacy efforts on behalf of children and youth. PTA funds must not be used to fund school system responsibilities, including curriculum materials, salaries, and infrastructure needs.

PTA's Tax-Exempt Status

Utah PTA has secured a 501(c)(3) exemption status from the Internal Revenue Service (IRS) recognizing it as a charitable organization exempt from income tax. Each Local PTA in good standing is covered by this group exemption. The IRS requires Utah PTA to submit a list of its subordinate units in good standing annually.

One major advantage of exempt status under section 501 (c)(3) of the Internal Revenue Code is that contributions to Utah PTA and its subordinate Local PTAs may be treated by donors as charitable contributions for income-tax purposes. Another significant advantage is that most PTA fundraising activities—income from activities that are substantially related to the exempt purpose—are exempt from federal income tax.

What restrictions does 501(c)(3) status impose?

- ♦ Operation exclusively for exempt purposes
- ♦ Absolutely no participation in the political campaigns of any candidate for local, state, or federal office
- ♦ Restrictions on lobbying activities to an insubstantial part of total activities
- ♦ No inurement of earnings to the benefit of any private individual

What responsibilities accompany 501(c)(3) status?

- ♦ Keep books and records detailing all activities, both financial and non-financial.
- ♦ File an annual information return—Form 990 or 990EZ—or electronic notice—Form 990N (also known as the e-Postcard).
- ♦ File Form 990T if there is \$1000 or more of gross receipts from an unrelated trade or business.
- ♦ Meet requirements of substantiation and disclosure for charitable contributions.
- ♦ Further information about these responsibilities can be found in the Utah PTA Treasurer Handbook.

Charitable Solicitations Act

In Utah, under the Charitable Solicitations Act, charitable organizations are required to be registered with the Utah Division of Consumer Protection before soliciting charitable donations. “Charitable solicitation” means any request, direct, or indirect, for money on the representation that it will be used for a charitable purpose. Additional information about the Charitable Solicitations Act can be found at consumerprotection.utah.gov/registrations/charities.html.

The law provides an exemption from the registration requirement for a PTA organized within and authorized by a school in support of the operations or extracurricular activities of the school. Local PTAs do not need to submit anything. It is done by the Utah PTA Treasurer. The Administrative VP of the school is required to review and sign each check request and pre-funded spending card form for the PTA. This is a requirement of the Utah Charitable Solicitations Act.

Financial Grant Agreement

The Financial Grant Agreement is found in the Utah PTA Treasurer Handbook. If the PTA Board votes and approves the gift of money to the school a financial grant agreement must be filled out and signed by the school Administrative VP, PTA President and PTA Treasurer. The grant must be used for the sole purpose of what the money was approved to be used for. The agreement is between the PTA and the school.

Utah PTA also has received an exemption from sales tax from the State of Utah. State law requires every PTA to pay sales tax on purchases under \$1000 and then request a refund. Utah PTA has an established process for applying for a refund. Instructions can be found in the annual Utah PTA Treasurer Handbook and/or on the Utah PTA website (www.utahpta.org/treasurer). The PTA tax-exempt number can be used for PTA purchases over \$1000. Vendors may request a tax-exemption certificate, which can be obtained by calling the Utah PTA office. No PTA purchases should be made using the school tax-exempt number.

Budgeting Process

Each Local PTA must operate according to an annual budget that has been approved by the general membership. The budget is the PTA's road map for the year. The budgeting process should be taken seriously, but it does not need to be complicated. Only expenditures in accordance with the approved budget may be made. Any substantial change to the budget must take the form of an amendment approved by the general membership.

A school may make approved purchases for the Local PTA and request reimbursement from the PTA in accordance with established procedures for cash disbursement (use of check request forms with approval signatures and proper invoices and/or receipts). A Local PTA may also gift the school money for an approved purpose in the form of a grant, with a written, signed grant agreement and full accountability of expenditures made after board approval. No check should ever be written directly to the school without appropriate supporting documentation. Neither should any distribution be made to the school to "clean out" the PTA account at the end of the fiscal year; carrying forward to the subsequent year a reasonable "reserve fund" is an integral part of each PTA's planning and budgeting process. PTA fundraising activities must also comply with school district policies.

More information about the budgeting process can be found in the Utah PTA Treasurer Handbook and the Utah PTA website (www.utahpta.org/treasurer).

Basic Fiscal Management Procedures

It is an unfortunate fact that non-profit organizations are susceptible to fraud. One of the most important things that PTA leaders can do for the well-being of the Local PTA is to implement and follow a system of internal controls. Good internal controls guard against both errors—unintentional mistakes—and irregularities—deliberate attempts to misuse or misappropriate the assets of the PTA.

All elected officers of the Local PTA, including the Administrative VP, and the fundraising chair(s) must verify by their signature that they have read and understand the “Basic Fiscal Management Procedures” outlined in the annual Utah PTA Handbook. (This form is also available at www.utahpta.org/treasurer.) These procedures have been established to protect the PTA’s assets—its volunteers and the good name of the PTA and the school, as well as its funds.

Among the important internal controls that should be in place are the following:

- ♦ All PTA monies are kept separate from school and personal funds.
- ♦ The Treasurer maintains custody of the checkbook at all times.
- ♦ Bank signature cards are kept up-to-date with at least three (3) signatories who have been approved by the Board.
- ♦ Authorized signers on the checking account are not related by blood or by marriage, nor do they reside in the same household.
- ♦ All checks have two (2) authorized signatures and the signing of blank checks is prohibited.
- ♦ Three (3) people are present for all counting of cash.
- ♦ All funds are deposited in a timely manner, and money is never left overnight at the school, in a car, or in a home or workplace. (The bank’s night depository should be utilized for events concluded after banking hours.)
- ♦ Monthly bank statements are reviewed by the President and reconciled in a timely manner.
- ♦ The Treasurer prepares and presents a Treasurer’s report or financial statement at each general membership meeting and at executive committee and board meetings as deemed appropriate.

Fundraising Guidelines

PTA fundraising should be carried out within the framework of PTA’s noncommercial policy. This policy requires that the PTA not endorse any commercial entity nor engage in business activities unrelated to the Purposes of PTA. PTA fundraising activities must also comply with your school district policy.

Planning for PTA fundraising activities should occur after the planning of the programs and projects for the school year, as PTA does not exist to raise large amounts of money or supplement school finances. A general fundraising guideline is the 3-to-1 rule: for every fundraising activity, there should be at least three (3) non-fundraising programs or projects aimed at helping parents or children. The school and its PTA need to follow the district guideline for fundraising.

One well-planned fundraising event will usually raise enough funds to fulfill the goals and objectives of the PTA for the year. The following questions should be considered in selecting and planning a fundraiser that will be both successful and worthy of the PTA:

- ♦ Does it adhere to the PTA Purposes and Mission?
- ♦ Does it conform to the noncommercial, nonsectarian, and nonpartisan policies set forth in the PTA bylaws?
- ♦ Does it preclude the exploitation of children?
- ♦ Will it create goodwill for the PTA?
- ♦ Is it a type of activity that can serve as a positive example for children and youth?
- ♦ Will it provide the revenue needed to meet the PTA's goals?
- ♦ Has a budget of required expenditures (e.g., cost of materials and publicity for the event) been provided?
- ♦ Are special permits, such as food handling permits, required?
- ♦ Are the PTA and its members protected through sufficient insurance coverage or otherwise?
- ♦ Are contracts required; and if so, has the President signed contracts with vendors and/or manufacturers? (The President is the only person who can sign a contract binding the PTA, although the Administrative VP may make recommendations to the Executive committee regarding contracts and their appropriateness with regard to school system regulations.) Do contracts for products include responsibility for spoiled, damaged, or unclaimed goods?
- ♦ Have procedures been established to safeguard the handling of products and money?
- ♦ What requirements, if any, are involved in using a facility?
- ♦ Are there applicable local, state, or federal laws; and if so, is care taken to see that no law is violated?

Annual Financial Reconciliation (AFR)

The books of the Treasurer are closed no later than June 30—the end of the fiscal year—so that they may be submitted for an Annual Financial Reconciliation. An AFR is required by PTA bylaws. It is for the protection of the Treasurer and the Board and provides for accountability to the PTA membership, by assuring that the records are accurate.

More information about the Annual Financial Review process, including who should perform the review, when it should be performed, and what it involves, can be found in the bylaws, in the annual Utah PTA Handbook, and in the Utah PTA Treasurer Handbook.

Administrative VP's Role

An Administrative VP who understands the importance of proper fiscal management procedures and fully supports their use helps the PTA maintain a solid foundation for its work in advocating for children, families, and public education.

PTA Basics

Communication

The PTA President and Administrative VP (or his/her representative) should establish a communication line from PTA to Administrative VP and vice versa. This line of communication is beneficial for many reasons. It will:

- ♦ Ensure the Administrative VP is aware of all requests made to the PTA
- ♦ Ensure the PTA President is aware of all requests made to administration
- ♦ Redirect conversation pertaining to PTA support to the Executive Committee and Board meetings where requests should normally be made

Monies

All PTA monies belong to the association and decisions about the disbursement of PTA funds must be approved by the general membership. Because the PTA is a private organization, PTA monies should never be commingled with the funds of any individual, the school, or another organization. All monies deposited in a PTA account will be considered to be PTA income by the IRS. The PTA should not allow school or other funds to “flow through” its checking account. If the PTA sponsors a project or program in cooperation with the school, all funds should be accounted for and separated prior to the immediate deposit of the PTA portion into the PTA bank account.

Use of School Facilities

School property is government property. The use of school property is governed by policies established by the local school board. The general rule of thumb is that the school board must provide equal access to all outside agencies.

PTA Involvement During the School Day

The presence of PTA volunteers must follow local school policy with the approval and supervision of the Administrative VP, who has the legal duty to oversee the care and protection of the students. We suggest that the PTA and Administrative VP develop a volunteer training process to ensure that PTA volunteers understand their roles, responsibilities, and limitations.

Insurance

Coverage for all PTAs

The Utah Risk Manager of Administrative Services modified Rule R37.4 of the Utah Administrative Code adjusting the Utah Governmental Immunity Act Limitations (Tort Limits).

This adjustment **STRONGLY RECOMMENDS ALL** PTA groups have and maintain General Liability coverage with limits up to the governmental entity tort limits (i.e. - same coverage as for School Districts). **PTAs are NOT covered by their district or school insurance**, they **MUST** obtain and maintain their own policy. Districts **do not** cover your PTA money in case of loss, theft, embezzlement, etc. This is a broader law for anyone who uses a school/civic center facility to purchase liability insurance for events that are outside of school responsibilities. The law is designed to be adjusted each year and therefore the limits may change each year.

As of January 18, 2019, the law stipulates a liability limit of \$2,552,000.

Advocacy and Legislation

PTA, by definition, is an advocacy association and may support or oppose legislation that affects children. School personnel, as governmental employees, are subject to the Ethics in Government Act and may not support or oppose ballot issues on school time. In these instances, PTA must ensure that its advocacy efforts are not attributable to school employees. The school/PTA newsletter is a common problem area. If school resources (including personal time) are used to produce or distribute the newsletter, then care must be taken not to advocate on a ballot issue. PTAs should maintain membership lists so that members can be contacted directly by the PTA. Remember the Ethics in Government Act only applies to governmental employees and applies to influencing voters about an upcoming ballot issue. It has no relevance to encouraging the membership to write to an elected official about his/her position about an issue or about a piece of legislation.

Volunteers

The PTA consists of parents and community members who have volunteered time, energy, and expertise to be advocates for and improve the lives of children. People who have been asked to volunteer are generally much more likely to do so than those who haven't been asked. The majority of volunteers are willing to do so for the right reasons. PTA officers and the Administrative VP need to focus on asking school community stakeholders to volunteer and to be able to explain the benefits of volunteering. PTA officers and the Administrative VP should also be able to articulate volunteer opportunities that may not require a stakeholder to physically come in to the building. Many parents and community members are unable to volunteer in the building, but these stakeholders are untapped resources and need to be included.

Awareness

Raising awareness means being sensitive to stakeholders and disseminating accurate information that dispels rumors, myths, and stereotypes which can often be destructive to a school's efforts. PTAs and Administrative VPs should be keenly aware of a school's diversity (language, culture, religion, education, and socio-economic background) and reach out to all groups. Networking with community resources, educating the association about the diversity within the school, and examining changing family and work patterns will demonstrate a focus on improving the lives of children and educating the stakeholders at large. The school climate and the activities and goals of PTAs must ensure that the environment is inclusive and all policies and procedures support the school's strategic plan. The vision of the PTA can ultimately be strengthened through a diverse membership and participation.

Appreciation

It is important to thank people for their hard work, participation and commitment. Throughout the year, many PTAs provide treats, breakfasts, lunches, notes of appreciation, or small gifts of appreciation to remind school staff they are invaluable. Similarly, the school should show appreciation to its PTA volunteers. The gesture need not be large. A simple thank you note or a volunteer appreciation day at the school reinforces volunteers' efforts so they will come back.

Saying thank you to the myriad of volunteers needed to bring programs and events together is critical and cannot be overlooked. Administrative VPs should make this a priority to demonstrate that the partnership between PTA and Administrative VPs is critical to the overall health of the school. As stated, a simple note of thanks is a "gift" that counts.

PTA and Hospitality

The hospitality chairperson is the official host of the Local PTA and, with a committee, has the responsibility of establishing a friendly, comfortable atmosphere at PTA meetings and events. The hospitality committee helps to create a sense of belonging that invites members to become involved in PTA activities. Each school should have its own school Hospitality Committee to provide for events that are not sponsored or supported by the PTA. Any event for which PTA is asked to provide hospitality needs to support the Missions and Purposes of PTA and the goals of the local PTA.

Training

The PTA budget should include funds for PTA volunteers to attend training meetings, including the Utah PTA Leadership Convention. Training for PTA leaders is not only a legitimate expense but should be a high priority of the Local PTA.

Dr. Stephen F. Ronnenkamp, Former Superintendent

Granite School District, April 2006 Region 5 PTA Training

America's public schools can be traced back to 1639-40. In Massachusetts, schools were established by direct taxation to:

1. Teach basic reading, writing, and arithmetic skills
2. Cultivate values that serve a democratic society (history and civics)

The creators of these first schools assumed that families and churches bore the major responsibility for raising a child. However, as time progressed, public schools assumed more responsibility. At the beginning of the twentieth century, society began to assign additional responsibility to public schools. Industrialization and the expansion of a market economy fueled disturbing social issues. Publicly financed, free schools, open to all children, were to ensure that future citizens would exercise their rights as American citizens. This trend of increasing the responsibility of public schools began then and has accelerated ever since. Public schools are society's attempt to structure its future. Public schools were called "common schools" because the mechanism for accomplishing these goals was to provide all children with a common set of experiences. The common set of experiences is the curriculum.

New Mission

Public education has been experiencing a transformation of accountability for the learning at high levels for all children. The results of research confirm the credence of early effective schools research:

"We can, whenever and wherever we choose, successfully teach all children whose schooling is of interest to us. Whether or not we do it must finally depend on how we feel about the fact that we haven't so far."

There is clearly a new articulated mission for public schools. All children must learn at high levels. In America, no child can be left behind. It's a move from compulsory attendance and access to required learning for all. The key factor in the success of high-performing schools is the belief and expectation that all students can excel. This climate reinforces the fact that a partnership of caring parents, supportive communities and effective schools is critical to a child's success in the near and long term.

The School Administrative VP

The quality of a school hinges on the Administrative VP and the degree to which he or she engages parents and community in a shared vision of success for all, creates a culture of respect and high expectations, and promotes delivery of high-quality curriculum, instruction, and assessment.

The Administrative VP is expected to lead the school in meeting the learning needs of all students, to know what constitutes good instructional practice, and to coach and otherwise guide teachers in the continual improvement of their educational knowledge and practice, so that all students can reach their potential.

Parents and Community

In our democracy, parents should not be a passive audience that approves or disapproves of the performance of schools, but rather needed contributors to the overall success of the mission of a school. To the extent that parents and the community are passive, democracy falls short of its full measure.

The body of research has consistently shown that when parents are involved in their children's education, students have higher grades, test scores, and graduation rates. They have greater self-esteem and less interest in inappropriate behavior.

Not only do parents establish high expectations for their own children, but they demand effective teaching, high academic standards, and strong educational leadership.

PTA Leader

PTA leaders are essential to the success of parent involvement.

Generally speaking - from my own experience - PTA has a mission to:

1. Support and speak on behalf of children
2. Assist parents in developing parenting skills
3. Encourage parent and public involvement in the schools

May I suggest five points of advice to school PTA leaders:

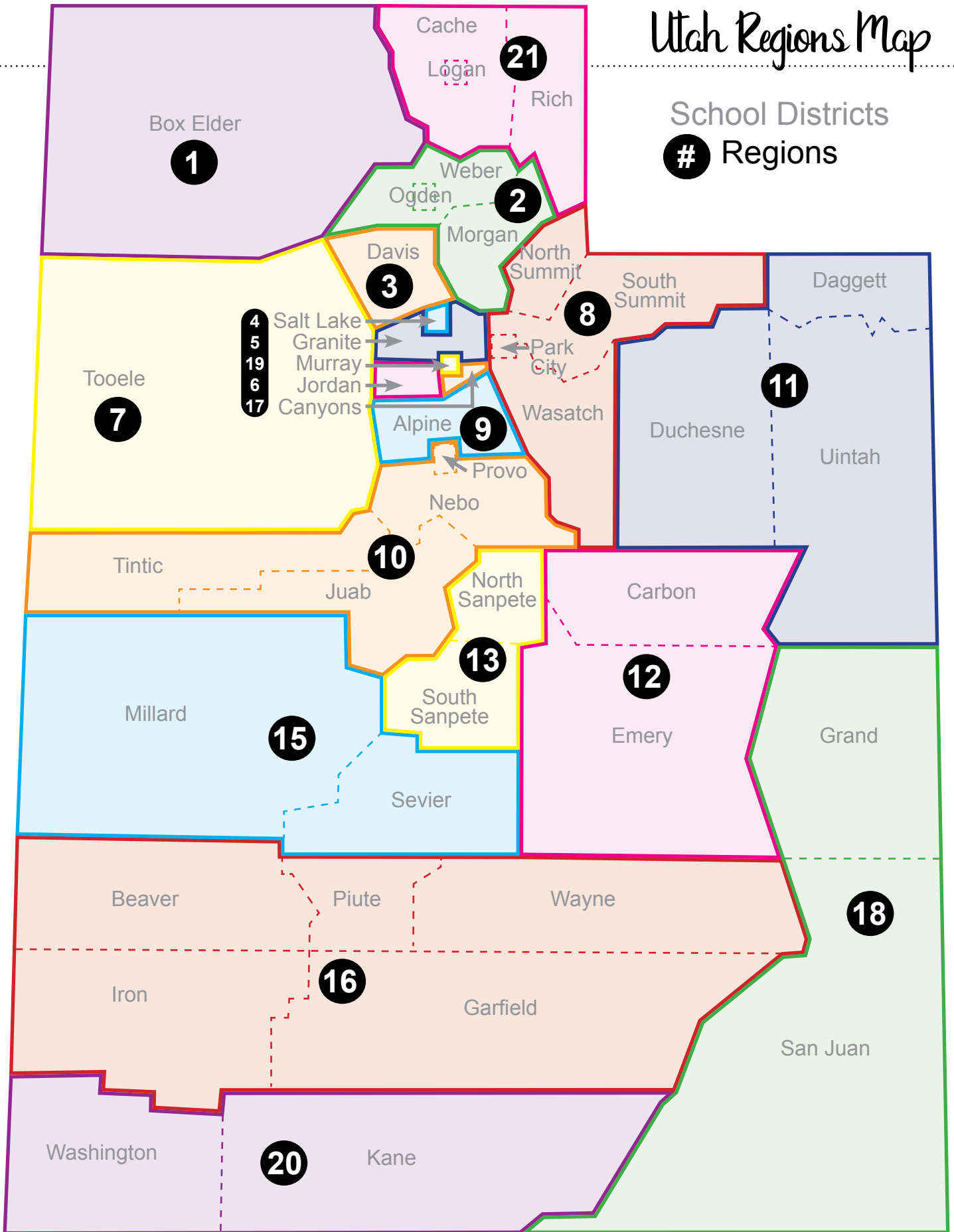
1. Get to know the Administrative VP and build a collaborative relationship
2. Maintain a "what's in the best interest of children" mentality
3. Become well acquainted with the vision of the school and become a strong advocate for its mission
4. Reach out to all parent groups and help them work through the system
5. Don't allow contentions to grow, but help facilitate the findings of solutions

Administrative VP/PTA Leader

If there is a strong climate of respect and collaboration between the Administrative VP and PTA, the school will be more effective in accomplishing its mission of educating all children at high levels of achievement.

Utah Regions Map

School Districts
Regions



Resources

Utah PTA

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kids@utahpta.org

www.UtahPTA.org

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9:00 am - 3:00 pm

Closed Friday | Closed holidays

Please call before you come to ensure office is open.

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Alexandria, VA 22314

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