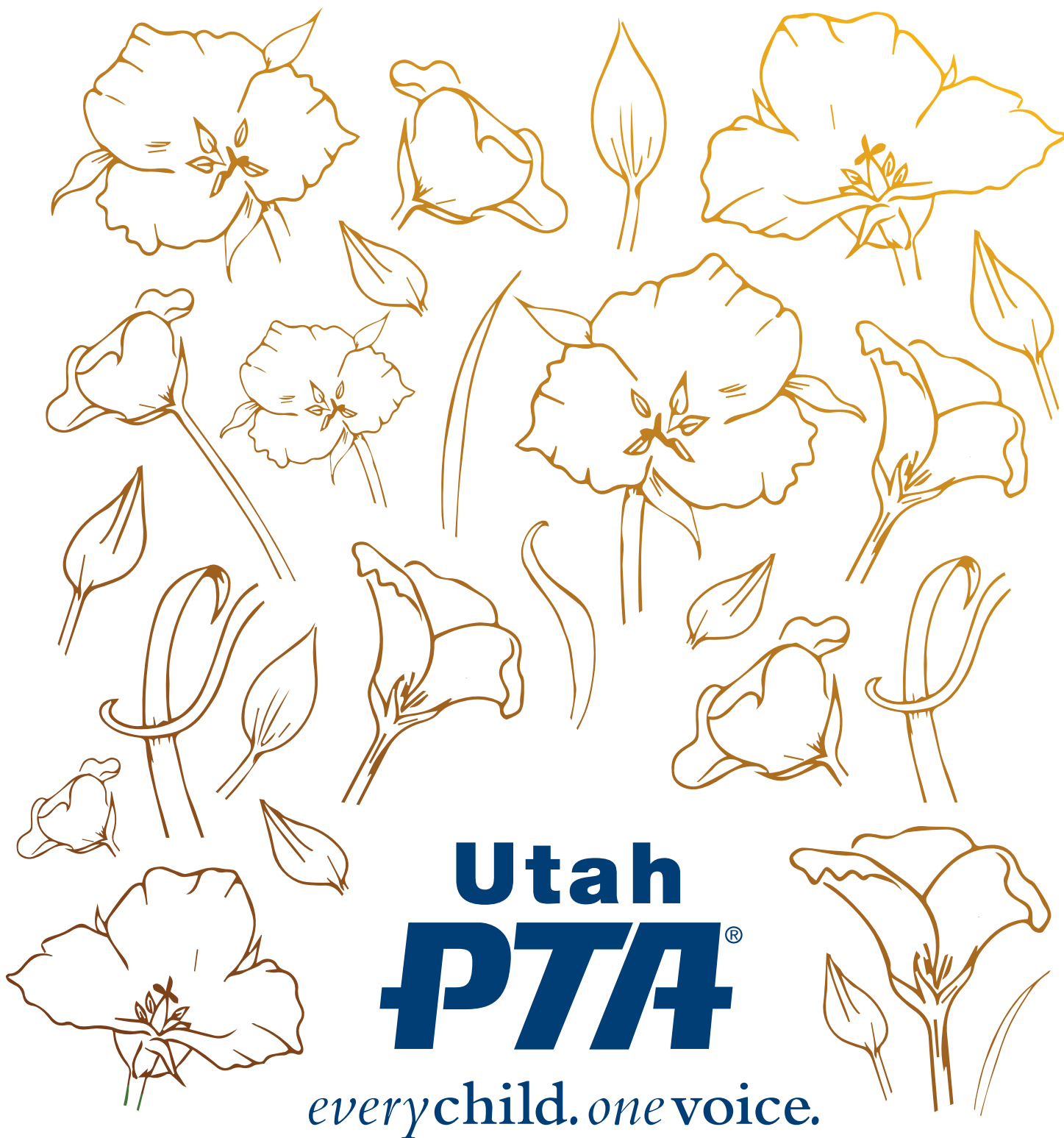


2023 UTAH PTA HANDBOOK

COUNCIL PRESIDENT



Utah
PTA[®]

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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* on-line magazine) first issued

1921 - 1960

- 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

1961 - 2000

- 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

2001 - PRESENT

- 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"



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INTRODUCTION

The information in the handbook has been compiled by Utah PTA to help you carry out the responsibilities associated with your program or event. For more detailed information about your Program/Event, please see utahpta.org.

Programs/Events help achieve the goals of the PTA by enabling parents, teachers, and the community to gain knowledge and understanding of children, their growth, development, needs, and environment. As the vital link between home and school, the PTA Programs/Events unlock all aspects of the PTA so there can be enthusiastic participation throughout the unit for the entire year. PTA Programs/Events guarantee that critical issues will be confronted for the benefit of all children and youth. Success is based on caring and sharing.

Programs/Events work when they meet the needs of students, staff, and community. They are the result of careful planning and a great deal of cooperation. The success of any Program/Event relates to how well it was organized and presented. Relevant and dynamic Programs/Events attract members to meetings. Programs/Events must be timely and responsive to the needs of members. A membership chair can enroll members, but it is the Programs/Events that draw members to meetings and involve them in issues.

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 Handbook or the Utah PTA website, 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 and teacher representatives, immediate past president, commissioners, region and 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 VP), secretary, treasurer, commissioners

Local Board of Directors

President, president-elect, vice presidents (including Administrative VP and Teacher VP), secretary, treasurer, commissioners



OVER 125 YEARS STRONG

For more than 125 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.



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 current 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.
- ♦ Has the backbone of 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

MEMBER → LOCAL → COUNCIL → REGION → STATE → NATIONAL

NATIONAL → STATE → REGION → COUNCIL → LOCAL → MEMBER

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 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 or more school districts are under one region director. Local PTA Administrative Vice Presidents 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 735,543 hours of service to Utah's children in their local public schools in 2022. If this volunteer service were translated into monetary value, it would be worth \$22,029,512.85!

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/Nov)
- 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	Military Families
Awards	Reflections
Bylaws	Resolutions
Digital Wellness	Special Needs
Diversity and Inclusivity	Technology
Family Engagement	Trust Lands
Male Engagement	



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. Add more information can be found at NPTA at <https://www.pta.org/home/run-your-pta/family-school-partnerships>

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.

2 Communicating Effectively

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

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 to strengthen their knowledge and skills to do so effectively.

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.

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.

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 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: pta.org/center-for-family-engagement/four-parts-of-family-engagement



4 Principles of Transformative Family Engagement

<p>INCLUSIVE</p> <p>Embracing and valuing diverse perspectives.</p> 	<p>INDIVIDUALIZED</p> <p>Meeting the unique needs of every family and child.</p> 	<p>INTEGRATED</p> <p>Connecting and aligning with the educational system.</p> 	<p>IMPACTFUL</p> <p>Empowering families to support their child's success.</p> 
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WHAT IS A COMMISSION?

A commission is a specific group that develops and implements programs and projects within related areas of concern.

Q What is the purpose of a PTA commission?

A It is to resolve critical school and community issues and concerns identified by the PTA membership through a needs assessment.

Q What is the role of a commissioner?

A It is to act as the presiding officer and facilitator of a commission and to report commission plans to the Executive Committee.

Q Who selects a commissioner?

A Bylaws indicate whether the commissioner is elected or appointed with board approval.

Q Who selects commission members?

A Commissioners and/or officers appoint commission members as needed.

Q When does a commission meet?

A The commissioner may determine a meeting schedule. These meetings are generally held outside of regular board meetings.



INFORMATION ON COMMISSIONS

How to Get Started

- ♦ Attend training at state, region, and council levels.
- ♦ Become familiar with national, state, and local commission-related issues.
- ♦ Gather resources from past commissioners.
- ♦ Organize your commission.
- ♦ Identify local needs or concerns:
 - Include current issues on needs assessments
 - Determine areas where teachers or school programs need assistance
- ♦ From the needs assessment:
 - Prioritize
 - Set goals
 - Develop a plan of action

Responsibilities of a local PTA commissioner

- ♦ Become knowledgeable about PTA policies and current issues.
- ♦ Know the key people and organizations that relate to your commission.
- ♦ Act as a resource on commission issues. Disseminate information and material pertaining to commission concerns to parents, teachers, and community.
- ♦ Serve on council commission if one is organized.
- ♦ Be an active, participating member of the local PTA Board of Directors.
- ♦ Serve on PTA and community committees as assigned by the PTA president or board.
- ♦ Organize your commission with teachers, students, parents, and community members.
- ♦ Develop and implement programs that relate to commission concerns.
- ♦ Keep a record of number of hours spent in PTA work.
- ♦ Keep a procedure book to be passed on.
- ♦ Advocate for children on commission-related issues.
- ♦ Attend appropriate meetings, including:
 - Local PTA Board of Directors
 - Training sessions conducted by Utah PTA, region PTA, and council PTA
 - All local PTA general membership meetings
 - Utah PTA Leadership Convention
 - Advocacy Conference
 - PTA Day at the Capitol



Responsibilities of a council PTA commissioner

- ♦ Provide training and leadership for local commission counterparts.
- ♦ Act as a resource and provide new ideas and approaches for commission concerns.
- ♦ Provide information to local PTA units on policies, goals, and objectives.
- ♦ Organize council projects, conferences, and workshops as needed.
- ♦ Conduct council commission meetings.
- ♦ Keep a record of number of hours spent in PTA work.
- ♦ Attend appropriate meetings.
- ♦ Maintain a resource file/procedure book to be passed on.
- ♦ Advocate for children on commission-related issues.

Responsibilities of a region PTA commissioner

- ♦ Provide training and leadership for council commission counterparts.
- ♦ Act as a resource and provide new ideas and approaches for commission concerns.
- ♦ Provide information to region PTA units on policies, goals, and objectives.
- ♦ Organize region projects, conferences, and workshops as needed.
- ♦ Conduct region commission meetings.
- ♦ Keep a record of number of hours spent in PTA work.
- ♦ Attend appropriate meetings including Utah PTA commission meetings.
- ♦ Maintain a resource file/procedure book to be passed on.
- ♦ Advocate for children on commission-related issues.

Who can Serve on a Commission Committee?

- | | | | |
|---------------|--|----------------|--|
| Local | <ul style="list-style-type: none"> ♦ Teachers ♦ School nurse ♦ Appointees as needed ♦ Specialists ♦ Local officers ♦ Students (PTSA) ♦ Community members | Council | <ul style="list-style-type: none"> ♦ Elected or appointed commissioner ♦ Local commissioners ♦ Council officers ♦ Appointees as needed ♦ Specialists ♦ Local presidents ♦ Student members ♦ Community members |
| Region | <ul style="list-style-type: none"> ♦ Elected or appointed commissioner ♦ Council commissioners ♦ Region officers ♦ Appointees as needed ♦ Specialists ♦ Council presidents ♦ Student members ♦ Community members | State | <ul style="list-style-type: none"> ♦ Elected commissioner ♦ Region directors ♦ Associate region directors ♦ State officers (as appointed) ♦ Specialists ♦ Council presidents ♦ Student members ♦ Community members |



ORGANIZING YOUR COMMISSION/ COMMITTEE/PROGRAM/EVENT

Developing goals and plans for PTA commissions/committees/programs/events that meet the interests and needs of a school community are primary objectives of a PTA board.

Commission: At a local level, a commission is over several committees/programs/events, like an umbrella, with a specific issue or concern in mind.

- ♦ *Examples:* Community Engagement, Education, Family Life, Health, Individual Development, Safety, Student Leadership

Committee: At a local level, a committee is tasked to plan and carry out a specific event or program. Sometimes there is a committee and sometimes it can be chaired by a single person.

- ♦ *Examples:* Reflections, Safety Patrol, Student Club, Spelling Bee, Room Parents, Student Scholarships, Membership, Newsletter, and Social Media

Program: A PTA program is a program which the membership deems important to your school community through a needs assessment.

- ♦ *Examples:* Grad Night, Spelling Bee, Reflections, Battle of the Bands, Fundraisers, Spirit Nights/Family Nights

Events: The place and time at which a PTA program happens. Usually a PTA program that is a one time thing.

- ♦ *Examples:* Quest speakers at PTA meetings, Family Nights, Art Walks, Carnivals, Field Day

How:

Whether you are planning an event or running a program, there are general guidelines to be successful.

Step 1: Conduct a needs assessment or a survey of what the community/school finds important.

Step 2: Based on the needs assessment, make a plan of action for your commission/committee/program/event (c/c/p/e).

- ♦ While planning, keep in mind the impact on these populations:
 - Teachers, students, parents, community, and any specialists (both in your school and in the community).
 - How do you help each of them and how can they help this event/committee?
- ♦ Plan of action should include goals that you want to accomplish.
- ♦ You will be given a budget and you should stick within those parameters.
- ♦ **Procedure Book:** This is a book that will tell you what past years have done for your specific commission/committee/program/event. If you do not have the GIFT of a procedure book, put one together for the person after you!



Step 3: Planning meetings – Anything runs better when planned. Here are a few things to remember when planning:

- ♦ Who is in charge and who is there to help?
- ♦ What is the budget?
- ♦ Do you have anyone in the community who could help make this better?
- ♦ Have you reserved the physical facility?
- ♦ Do you have handouts prepared and approved if needed?
- ♦ How are you going to publicize (fliers, community, social media, school digital flier program, posters, etc.)?

Step 4: Program or event is held.

Step 5: Don't forget to evaluate, both patrons and the committee that put the event together. Put summary in procedure book. Things to remember:

- ♦ *Committee* – one thing that worked and one thing that didn't
- ♦ *Community* – what they liked and didn't like about the program/event
- ♦ *Summary* – give the ones that come after you a clear picture on what to do and not to do

Want more resources? Go to UtahPTA.org/Leadership-Resources to find planning guides, organizing your board and more.

- ♦ *Resources include:* Commission/Committee Planning Sheet, Plan of Action Worksheet, Event/Program Planning Sheet, Agendas, Needs Assessment, Organizing Your Board, etc.

Why:

Successful board members are team players who value cooperation, collaboration, and communication. They are most effective when they:

- ♦ Operate with integrity, civility, and trust
- ♦ Communicate a common vision
- ♦ Practice inclusion and welcome diversity
- ♦ Appreciate differences in work styles and perspectives
- ♦ Participate in training and mentoring
- ♦ Identify community needs and interests
- ♦ Maintain the confidentiality of board discussions

By working together as a team, a PTA board can make a difference on campus and in a community.

See utahpta.org for samples of agendas, goal sheets, and other implementation resources.



COUNCIL DUTIES AND RESPONSIBILITIES

What is a Council?

- ♦ A council is the key link in the line of communication between the local PTA and the region, Utah PTA, and National PTA.
- ♦ A council is three or more local PTAs/PTSAs organized under the authority of Utah PTA which operates under bylaws approved by Utah PTA. The council board is composed of officers as stated in the council bylaws (Article VIII Section 3).

Duties and Responsibilities of a Council

1. Strengthening local PTAs
2. Developing leadership through training
3. Promoting membership
4. Cooperating with other organizations to achieve common goals within the PTA framework
5. Distributing Utah PTA and region information
6. Installing local PTA boards
7. Coordinating the efforts of local PTA/PTSAs
8. Being a link through which local PTAs can work on projects or programs beyond the scope of a single PTA
9. Being a channel of communication between school administrators, school boards, and the general public
10. Providing financial training and information

A Council Provides:

1. An opportunity for local PTAs and their presidents to exchange ideas and plans, and to solve mutual problems through meetings and workshops
2. Strength to unite planning efforts to solve community-wide problems affecting children and youth
3. An opportunity for study groups to work on specific areas of interest
4. Pre- and post-convention training (may be in conjunction with the region)

A Council Helps Each Local PTA To:

1. Learn and use good PTA practices and apply National PTA and Utah PTA policies
2. Increase its capacity for service to home, school, and community
3. Compare methods of work and share problem-solving information and techniques with other PTAs
4. Stay informed of legislation affecting children at all times
5. Be financially sound



COUNCIL PRESIDENT CHECKLIST

- Meet with the outgoing council president to receive helpful information and transfer of PTA materials.
- Know the council bylaws and standing rules and maintain a file of local bylaws.
- Plan in advance to attend Utah PTA Leadership Convention (usually held in May) and the Advocacy Conference (usually held in October).
- Attend or conduct a post-convention orientation (usually held in the summer).
- Study the Utah PTA Council President Handbook.
- Appoint council commissioners and committee chairs.
- Train council board members.
- Conduct a needs assessment with your council board.
- In conjunction with the region director, prepare a calendar for one year.
- Prepare a budget for the coming year. Plan for goals established as a result of the needs assessment.
- Make sure funds are available for conferences and conventions.
- Appoint commissioner and/or chairman to oversee each individual project or program identified from needs assessment.
- Study the Utah PTA President Handbook and review and submit reports for which you are responsible.
- Maintain complete and accurate financial records, and submit all required forms and reports, including annual financial reconciliation.
- Oversee financial practices and reporting at the local PTA level, including collecting and compiling required forms, reports, and annual financial reconciliation.
- Prepare an agenda for each council meeting.
- Attend all meetings where the council should be represented or send a representative.
- Elect a nominating committee and train locals to elect nominating committees (see the Utah PTA President Handbook).
- Compile a procedure book. Encourage all officers to do the same.
- Meet on a regular basis with an administrator representative from your district and invite the administrator representative to your meetings.
- Attend or conduct a pre-convention orientation (usually held in the spring).
- Complete online reports for council, including volunteer hours.
- Ensure local PTAs file online reports.
- Recognize volunteers.



MEETINGS

YOU CHAIR	Council Executive Committee meetings Council Board Meetings Pre-Convention Orientation Post-Convention Training (Region may facilitate the pre- and post-convention meetings)
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YOU ATTEND	Region Meetings School Board Meetings Utah PTA Advocacy Conference PTA Day at the Capitol Utah PTA Leadership Convention
-----------------------	--

Optional (as requested)

Committees as appointed by school district

Utah PTA commissions, committees, etc.

Remember to Model Leadership Principles in Your Meetings

- ♦ Inform your membership in advance of the agenda.
- ♦ Be fair, use parliamentary procedure.
- ♦ The majority rules, but the minority must be heard.

Utah PTA Advocacy Conference

A conference usually held in the fall to educate members about the PTA resolutions, legislative issues, and the legislative process.

PTA Day at the Capitol

A day during the Utah legislative session for PTA members to come to the capitol to learn about current issues, participate in the legislative process, and meet with their legislators in a luncheon or reception.

Utah PTA Leadership Convention

A convention held annually, usually in May, to conduct the business of the Utah PTA, including elections of Board of Directors, resolutions and other business, as well as training in all leadership positions.

Utah PTA Commissions

As a council president, you have the option to serve on a Utah PTA committee or commission. If you choose to serve on a Utah PTA committee or commission, you will be required to attend those meetings. Please let your region director know if you would like to serve on a commission.



MEETINGS THAT YOU CHAIR

Council Executive Committee Meeting

When: Recommend monthly (refer to council bylaws)

Who: Council officers and others as invited

Purpose: To plan council board meetings, conduct business, and give training

Suggested agenda items:

- ♦ Evaluate needs assessment and set goals
- ♦ Develop budget (to be approved by council voting body)
- ♦ Determine calendar
- ♦ Disseminate information from region and Utah PTA
- ♦ Handle correspondence/thank you's
- ♦ Give assignments
- ♦ Plan council board meetings

Council Board Meeting

When: Recommend monthly (refer to council bylaws)

Where: A local school, district office, etc.

Who: Local PTA presidents, local presidents-elect, council Executive Committee, appointed council board members, district administrators, local principals, and other local board members, as invited (region directors and administrators may be invited to this meeting)

Purpose: Conduct business of the council and give training

Suggested agenda items:

- ♦ Present a financial report (this is required at every board meeting)
- ♦ Review calendar
- ♦ Disseminate information from region and Utah PTA
- ♦ Receive input from administration
- ♦ Present council board member reports (e.g. Reflections chair, Legislative Vice President, etc.)
- ♦ Provide trainings:
 - Leadership
 - Financial
 - Programs
 - Exchange and share ideas



Pre-Convention Orientation Meeting

When: Preferably between local elections and early bird registration for convention.

Who: Local and council PTA board members.

Purpose: A successful pre-convention orientation may be held at either the region or council level and should include “get acquainted” activities, convention information, recognition and training.

Suggested agenda:

Welcome

Reverence/Thought and Pledge

PTA Business (e.g., introductions, announcements, leadership and membership awards, and other recognition)

Program (may include remarks from Utah PTA board members, superintendent(s), school board, musical numbers, etc.)

Convention information you may want to cover:

- ♦ Help members plan for training needs and decide on workshops
- ♦ Inform members of special events and convention speakers
- ♦ Describe ways to make the most of convention including:
 - Travel and eat lunch together
 - Visit exhibitors and Utah PTA Boutique
 - Get to know other delegates from around the state
 - Give courteous attention to presenters
 - Take adequate notes, keeping in mind your PTA’s needs
 - Participate in discussion and vote on resolutions
 - Get to know Utah PTA board members
 - Respond to post-convention evaluation requests

Additional training (with a large group, you may want to break into smaller groups for “get acquainted” activities and training)

Adjourn



Post-Convention Training

When: After the Utah PTA Leadership Convention which is usually held in May

Who: Council board members, local board members, superintendent(s)

This training meeting may be held under the direction of the region or council. Utah PTA officers may be invited to participate.

Post-Convention Training Suggested Agenda

Welcome

Reverence/Thought and Pledge

PTA Business (e.g., introductions, calendaring, announcements, awards, membership, and other recognition, etc.)

Program (may include remarks from Utah PTA board members, superintendent(s), school board, musical numbers, etc.)

(You may want to break into smaller groups for “get acquainted” activities and training.)

Convention information you may want to cover:

- ♦ Break-outs for training
 - Presidents
 - Vice presidents (including administrators and teachers)
 - Secretaries
 - Treasurers
 - Commissioners
 - Appointees (as needed)
- ♦ Dismiss from individual training sessions

Additional training with a large group as needed

Adjourn

Meetings You Attend

Region

- ♦ Typically held monthly to receive information from Utah PTA and region.
- ♦ As a member of the region board, you are expected to attend. If you cannot attend a region meeting, please ask someone to represent you.

Local PTA/PTSA Meetings

- ♦ Visit each local PTA at least once a year.
- ♦ Assign council board members to regularly attend local board meetings.



School Board Meeting

- ♦ Check with the school district office for the dates of school board meetings. Ask to be added to their mailing list or e-mail which will allow you to receive the agenda for school board meetings.
- ♦ The region director is the official Utah PTA representative in your school district. If you and your council want to address the school board, you should work with your region director to determine how the presentation will be made.
- ♦ If a PTA concern needs to be addressed at a school board meeting:
 - Council concerns are presented by a council president. (The region director should always be informed of any presentation to be given at a school board meeting.)
 - Region concerns are presented by the region director.



FINANCES

The council PTA is required to abide by the same financial policies and procedures as a local PTA. Specific information can be found in the following resources:

- ♦ Utah PTA Treasurer Handbook
- ♦ Council and Region Financial Handbook
- ♦ Financial section of the annual Utah PTA President Handbook
- ♦ Treasurer page of the Utah PTA website: UtahPTA.org/Treasurer
- ♦ National PTA's PTA Financial Quick-Reference Guide

A few points of emphasis:

- ♦ An adequate system of internal controls is just as vital for the council PTA as for the local PTA, including the following:
 - Two signatures on all checks.
 - Use of money counting, funds received, and check request forms.
 - Prompt reconciliation of bank statements.
 - Regular treasurer's reports.
- ♦ Creating a Budget
 - A realistic budget should be based on prior year financial information as well as the goals you have set for the current year.
 - Funds for leadership training (including Utah PTA conferences and conventions) should be included in the budget. Training is an important and authorized use of PTA funds. The costs involved in having council officers attend conferences and conventions are legitimate PTA expenses.
 - Council dues should be set at a reasonable amount to cover the expenses of the council. Adjustments to the per-member council dues amount require an amendment of the bylaws.
 - Additional assessments of local PTAs – including “fees” for Reflections entries or administrative expenses – are not appropriate.
 - Councils must work with Utah PTA on any solicitation of charitable contributions. Contact the Utah PTA Treasurer for more information.
 - In accordance with bylaws, the council budget must be approved by the council voting body at the first council meeting of the year (prior to October 1).
- ♦ Year-End Financial Statement and Annual Financial Reconciliation Review Report
 - In accordance with bylaws, an Annual Financial Reconciliation of the council treasurer's books must be conducted at the end of each fiscal year and upon change in the office of treasurer.
 - Also in accordance with bylaws, the Year-end Financial Statement and Annual Financial Reconciliation report must be submitted to the current Executive Committee no later than August 1 and presented to the voting body of the council for adoption at the first council meeting of the year.
 - The Year-end Financial Statement and Annual Financial Reconciliation report must also be submitted to the region director/treasurer no later than August 15.



- ♦ Tax-Exempt Issues
 - Council PTAs must meet all IRS reporting requirements, including applicable annual IRS filing ("Form 990EZ" or "990N," depending on the amount of gross receipts).
 - Council PTAs may request refunds of sales tax paid from Utah PTA using the same procedure used for local PTAs.

DONOR-ADVISED FUNDS

A Donor-Advised Fund, or DAF, is a charitable giving vehicle administered by a public charity created to manage charitable donations on behalf of organizations, families, or individuals. Donor-Advised Funds are the fastest growing charitable giving vehicle in the United States by providing a flexible way for donors to pass money through to charities. Many individuals/businesses are choosing this method of charitable giving to support our local PTAs. Some of the more familiar giving funds are: Benevity Causes, Fidelity Charitable Giving, and YourCause.

Procedure

Every local PTA unit in good standing qualifies to receive donations through any DAF under the umbrella of Utah PTA, also known as Utah Congress of Parents & Teachers or PTA Utah Congress. The Utah PTA office has created and maintains accounts with many donor-advised fund. All donations processed through a DAF will be mailed to PTA Utah Congress using the office address of 5192 S. Greenpine Drive, Salt Lake City, UT 84123. Once donations are received in the office, Utah PTA will swiftly redistribute the donation to the intended PTA with a Utah PTA issued check. Please do not alter the address or name of any of the charitable donation accounts to ensure proper handling of current and future donations. All questions should be addressed to Utah PTA via email to Kids@UtahPTA.org.

Donor-Advised Funds

1. Benevity Causes: [Causes.Benevity.org](https://causes.benevity.org)

Benevity is a global leader in online workplace giving, matching, and volunteering. Some of the world's most iconic brands rely on Benevity's award-winning solutions to power their Goodness Programs and corporate philanthropy, helping them attract, retain, and engage today's workers by connecting people personally to causes that matter to them. Donations come from single donors and employees of corporations set up with Benevity. In fact, most corporations will "match" their employee's donations when using this vehicle of giving.

Utah Congress of Parents & Teachers has an account. Donors are instructed to list in the "Notes Section" the name of the local PTA to which they are donating. Also, they are required to document the EIN of the charity to which they are donating.

The donation check will come to the Utah PTA office and upon receipt, the Utah PTA office will deposit and reissue a check to the local unit.



2. Fidelity Charitable Gift Funds: FidelityCharitable.org

Established in 1991, Fidelity Charitable is an independent public charity that sponsors the nation's largest donor-advised fund program. Their mission has remained the same – to further the American tradition of philanthropy by providing programs that make charitable giving simple, effective, and accessible. As of 2015, they have 119,472 donors with 72,170 giving accounts available to support a non-profit/individual as they see fit. This is currently the largest giving fund through which the local PTAs are receiving outside donations.

The donation check will come to the Utah PTA office and upon receipt, Utah PTA will deposit and reissue a check to the local unit.

3. YourCause : YourCause.com

Top socially responsible companies partner with YourCause to manage their employee giving, volunteering, and grants programs. Their platform flexibility meets the needs of companies of all sizes – from Fortune 500 to small businesses – driving engagement and facilitating impact within the non-profit sector. Some of the businesses who donate through YourCause are: AT&T, Best Buy, Chevron, CenturyLink, Dell, Samsung, Symantec, and many more.

Utah Congress of Parents & Teachers has an account. Donors are instructed to list in the “Notes Section” the name of the local PTA they are donating to. Also, they are required to document the EIN of the charity to which they are donating.

The donation check will come to Utah PTA and upon receipt, Utah PTA will deposit and reissue a check to the local unit.

4. Other Corporate/DAF/Employee Funds:

- ♦ **Adobe Employee/Company Giving**
- ♦ **Kohl's Cares Program:** Volunteer events are set up and funds are disbursed through Benevity Causes. Please contact Utah PTA state office to arrange events and volunteer opportunities.
- ♦ **United Way Employee Giving**
- ♦ **Vanguard Charitable**
- ♦ **Walmart Foundation:** Please contact Utah PTA and notify us when you secure a donation with your local Walmart. This will help us disburse the donations quicker when the checks arrive.



ORGANIZE YOUR BOARD

- ♦ Members of a council board are either elected or appointed (see bylaws)
- ♦ Each council board member should have a job description and receive training

Elected:

President, president-elect, vice presidents, secretary, treasurer

*Nominations for these officers are presented by a **Nominating Committee** and are elected by the entire council voting body.* (Refer to Art. VIII)

Note: Every council should refer to the Utah PTA President Handbook in the nominations section as well as their council bylaws.

Appointed:

All other council board members and commissioners

CALENDARING

- ♦ Plan a calendar for the entire year.
- ♦ Coordinate the dates of Utah PTA, region, and council PTA meetings and activities so they don't conflict. The Utah PTA long-range calendar most likely will be in your convention packet and can be found on the Utah PTA website.
- ♦ Clear dates and coordinate meeting schedules with administrators as needed.
- ♦ Schedule regular meetings for the year with your local PTA/PTSA presidents. Have the calendar for the year prepared to hand out at post-convention training or at your first council meeting if post-convention training will not be held.



NEEDS ASSESSMENT

- ♦ Assess the needs of the council
- ♦ Prioritize and set goals with all board members from your needs assessment results
- ♦ Remember our first priority is children
- ♦ Keep PTA Purposes and bylaws in mind when setting goals
- ♦ Have each board member set individual goals

The Utah PTA President Handbook and Utah PTA website have more information on how to conduct an assessment.

INSTALLATION OF OFFICERS

The council president or designee may install local officers. It is a good idea to have a paragraph or two prepared to be used when installing local officers. This should be done at a local PTA meeting.

Read the Purposes and Mission of PTA and then use wording similar to either example 1 or 2 to install officers after inviting them to stand.

EXAMPLE 1 You have each heard the Purposes and Mission of PTA. Will you each separately and in united effort work toward the fulfillment of the Purposes of PTA in the service of children and youth? (Please answer “I will”). The present and future of the _____ PTA/PTSA now rests in your beliefs and abilities, your commitment and power of implementation, joined with the skills of the officers who will serve with you, and the faith and help of all other members of the association. Will you pledge yourselves to these people that serve with you? (Please answer “I will”).

(Address audience here) Here are your new leaders for the coming year. I urge you to give them your encouragement, support, loyalty, and cooperation.

You may be seated.

EXAMPLE 2 You have each heard the Purposes and Mission of PTA. Will you each dedicate yourself to accomplishing the duties and responsibilities entrusted to you, fully realizing the responsibility that is yours? Will you accept the call to duty with the firm resolve to give your best efforts at all times to those tasks that are inherent in the PTA?

(Please answer “I will”.)

You may be seated.



BOARD UNITY

Leader's Responsibility in Managing Conflict

- ♦ Preserve the dignity and self respect of all involved
- ♦ Listen with neutrality and try to see the situation from every perspective
- ♦ Accept the fact that you cannot change others' behavioral styles
- ♦ Allow each individual to express his independent point of view
- ♦ Relax—This can set a positive climate for discussion

Basic Thoughts About Conflict Resolution

- ♦ Assume that both parties want to come together.
- ♦ Go into problem solving/conflict resolution with an open mind; be as ready to change as you would like others to be.
- ♦ When there is unresolved conflict, everyone loses.
- ♦ Resolved differences are always win-win. Seek solutions where everyone wins.
- ♦ Put yourself in the shoes of others; try to solve a problem from “their” point of view.
- ♦ Talk about issues not people.
- ♦ Think about the desired result rather than about rigid positions.
- ♦ Keep talking, keep the dialogue open.

Avoiding Conflict Within the Local PTA

Most local PTA conflicts can be avoided if the leadership will take the following steps:

- ♦ Be knowledgeable about PTA
- ♦ Be familiar with bylaws
- ♦ Follow the policies of PTA
- ♦ Be informed about the issues
- ♦ Cooperate and communicate with the principal and school district



SIX STEPS TO PROBLEM SOLVING

1 Identify the Problem

- ♦ Where are we now?
- ♦ Where do we want to go?
- ♦ How can we get there?

4 Set Priorities and Design an Action Plan

- ♦ Action needed
- ♦ Date for completion
- ♦ Make assignments

2 Brainstorm the Solutions (Generate multiple solutions)

- ♦ Select alternatives
- ♦ Set priorities

5 Carry Out Action Plan

3 Select the Most Promising Alternatives

6 Evaluation

Problem Solving Pointers

You cannot determine a solution before you know the problem.

1. Let people solve their problems - other's problems are their own responsibility.
2. Most problems are best solved at the level in which they occur—that's where you start to solve the problem.
3. Avoid using a message that starts with "you." "You have a problem" will cause others to be defensive.
4. Use "I" messages. "I have a problem. I don't understand (name the problem). How can we work together to solve it?"
5. Identify the problem. Be specific without assigning blame.
6. Allow that others may have had a bad day. Keep the problem at the level of the problem. Take it seriously, not personally, and avoid making personal comments.
7. Solve only one issue at a time.
8. Make sure both sides of the issue are heard.
9. Listen carefully, then give feedback to make sure you have heard what the person is trying to tell you.
10. Talk about different ways to solve the problem. Then choose one or two that you both agree are "best" solutions.
11. 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).
12. Avoid dictating outcomes.



RECOGNITION AND AWARDS

Utah PTA Awards

All PTA Award Applications are included in the Utah PTA President Handbook.

- ♦ A council may apply for awards.
- ♦ Check the Utah PTA President Handbook for all awards due dates.
- ♦ All awards must be submitted to the region before going to the state level.
- ♦ If you have any questions, please contact your region director.

Award Advancement



Local Recognition

One of the most important aspects of leadership is to recognize those who volunteer for PTA. Council awards and recognition could include:

- ♦ **Founders' Day** (February 17)
- ♦ **Volunteer Appreciation** (typically the first full week in May)
- ♦ **Past President** - It is always appropriate to honor an outgoing or past council president with a past council president pin. Encourage locals to honor outgoing or past local presidents with a past president pin (both pins may be purchased at the Utah PTA office or ShopPTA.com).
- ♦ **Utah PTA Honorary Life Membership**
 - Appropriate for any dedicated PTA volunteer or administrator, available from Utah PTA
- ♦ **Other recognitions** (awards, gifts, certificates, etc., as applicable.)



REFLECTIONS

- ♦ Appoint a council Reflections chair.
- ♦ Determine council Reflections due dates.
- ♦ Coordinate collection of Reflections entries from local PTAs, judging of entries at the council level, and advancement of winners to region.
- ♦ Plan and hold a council Reflections awards event.
- ♦ Council sets the council Reflections due date based on the region due date.
- ♦ Refer to the Reflections Local Leaders Guide for information, rules, and forms. The Local Leaders Guide, rules and forms are available on the Utah PTA website Reflections page: UtahPTA.org/Reflections.
- ♦ Please work with your local leaders to ensure that their PTAs are in good standing (bylaws up to date and all current membership paid).



REPORTS

Note: Be sure to make copies for your records. Submit originals.

Collect From Local PTAs

- ♦ Year-End Financial Statements
- ♦ Annual Financial Reconciliation Reports
- ♦ "Form 990"
- ♦ Local PTA board list
- ♦ Approved budgets and meeting minutes when budget was approved
- ♦ Ethics/Conflict of Interest Policy
- ♦ Basic Fiscal Management Procedures
- ♦ Local PTA "Sales Tax Refund Request" forms
- ♦ Track online submission of Local Reports #1, #2 and #3
- ♦ Other reports as requested

Submit to Region

- ♦ Year-end Financial Statement
- ♦ Annual Financial Reconciliation Report
- ♦ Council Summary of Year-End Financial Reports
- ♦ Approved budget and meeting minutes where approved
- ♦ Ethics/Conflict of Interest Policy
- ♦ Basic Fiscal Management Procedures
- ♦ Council/Region Beginning Year Reports
- ♦ Local and council 990's
- ♦ "Sales Tax Refund Request" form—Council Compilation with all "Local Sales Tax Refund Request" forms (See current instructions online at UtahPTA.org/Treasurer/SalesTax)
- ♦ Council Report #1, #2, and #3
 - Reports are located on the Utah PTA website regions page, UtahPTA.org
- ♦ Other reports as requested



LOCAL PTA REPORTS #1, #2, AND #3

How to file: Submitted by local and council presidents and region directors

Due

Report #1 - November 1

Report #2 - February 1

Report #3 - June 1

To file your report:

- ♦ Go to UtahPTA.org
- ♦ Log in (top right corner of page) or create a new account
- ♦ Under "Quick Links," click "Report 1, 2, and 3"
- ♦ Follow instructions for submitting reports

INFORMATION ABOUT REPORTS

Specific Information:

- The Employer Identification Number (EIN) and local unit # are found on the front page of your bylaws. You may find a copy of your bylaws on the Utah PTA website, utahpta.org, or you may contact your 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 reports are listed on the website.
- After your report is submitted, you and your region director will receive a copy of it by email.



ORGANIZING A NEW LOCAL PTA

Council Guidelines

Information and forms for both Organizing a New Local PTA and the Dissolution of a Current PTA may also be requested from the Utah PTA office or your region director.

AN OVERVIEW FOR COUNCIL PRESIDENTS FOR STARTING A NEW PTA

We appreciate all you do for the PTA and the time that you will be spending to assist with starting a new PTA in your region. Request the New PTA Packet from your region director or the Utah PTA office. In the packet are guidelines, instructions, and the forms needed to get things going in your new school.

- ♦ It will take approximately 90 days to accomplish the work of organizing this PTA. Whether you are organizing a new PTA in an already functioning school or in a new school, work toward having the officers and other board members elected in time to attend the annual Utah PTA Leadership Convention.
- ♦ A successful PTA begins with the approval and support of the school's principal. Establish a good working relationship with them. All PTA planning should be coordinated with them either by attendance or at least by informing them of actions being taken.
- ♦ A new PTA can be organized by region leadership with council leadership assistance as needed. Begin organizing efforts by scheduling a planning meeting.
- ♦ When a new school is opening, the current PTA officers of the school(s) whose students will attend the new school should announce the date, time, and place of the planning meeting and invite all new school parents.
- ♦ When a PTA is to be created in an established school, all parents should be informed of the date, time, and place of the planning meeting.
- ♦ The purpose of the planning meeting is to set up two committees of three people each:
 - Bylaws Committee
 - Nominating Committee
 - All people participating in the committees must be members of the PTA. Collect membership dues and distribute membership cards. The minimum number of members for a new PTA is 10.
- ♦ Thirty days after the Bylaws and Nominations are posted an organizing meeting is held to:
 - Organize a new PTA
 - Vote to approve the new bylaws
 - Vote on officers
 - Sign paperwork and return it to the Utah PTA office



- **NOTE:** Checks for dues should be made out to the Utah PTA. At the close of the planning meeting, the region and/or council overseeing the process writes a check to Utah PTA which is sent in with the "New PTA Membership Remittance" form. Utah PTA will pay national, state, and council dues (if applicable), and send the remaining funds to the local PTA to open a new PTA bank account.
- The day after the meeting the new officers mail to the Utah PTA office:
- New local PTA application.
- IRS "Form SS-4" (Employer Identification Number [EIN] Application) and authorization statement, signed by the president and the treasurer of the new PTA.
- "New PTA Membership Remittance" form with the region and/or council checks for dues.
- Six sets of the approved bylaws (National PTA unit ID# and EIN will be written on the bylaws by the office). The bylaws must have the "Submitting New PTA Bylaws" form attached to the bylaws.
- The Utah PTA office will fill out and submit the form for the "Charitable Solicitation Act" form.
- ♦ After these are received in the office, the officers will receive:
 - Written notification of their EIN.
 - Two approved copies of their bylaws. They may then open their PTA bank account and deposit their membership funds from the Utah PTA account.

After the organizing meeting, the new PTA officers appoint commissioners and committee chairman to begin planning for the year, including attending Utah PTA Leadership Convention in May.



RESOURCES

National PTA Resources

National PTA Website: [PTA.org](https://www.pta.org)

National PTA Office: 1250 North Pitt Street, Alexandria, VA 22314

Other National PTA information:

- ♦ National PTA Annual Quick-Reference Guides
- ♦ *Our Children* Magazine—an online publication found at: [PTAOurChildren.org](https://www.ptaourchildren.org)
- ♦ National Standards for Family-School Partnerships (see page 9)
- ♦ 10 Ways to Help Your Child Succeed

Utah PTA Resources

Utah PTA Website: [UtahPTA.org](https://www.utahpta.org)

Utah PTA Office: 5192 S. Greenpine Drive, Salt Lake City, UT 84123

Monday - Thursday 9:00 a.m. - 3:00 p.m.

- ♦ Pamphlets and brochures
- ♦ PTA Boutique items are available at Leadership Convention and the Utah PTA office: limited availability of gifts, jewelry, T-shirts, and PTA bags

Field Service: Training provided by members of the Utah PTA Board of Directors in specific topics as requested by region and council leaders.

Utah PTA Conventions and Conferences: Utah PTA Leadership Convention, Utah PTA Advocacy Conference, Utah PTA Day at the Capitol.

Utah PTA President Handbook: Annual organizational materials including General Information, President's Tools, Membership, Nominations and Elections, Bylaws, Finances, Legislative, Public Relations, Programs and Resources, Reflections, Reports, and Awards and Grants.

Commission information found on UtahPTA website: Community Involvement, Education, Family Life, Health, Individual Development, Safety, and Student Involvement.

For information on the following programs go to UtahPTA website: Battle of the Bands, Leadership, Legislative, Membership, Public Relations, Reflections, Secretary, Teachers, Treasurer, and Trust Lands Handbooks. Utah PTA Arts Education Grant brochures.

Region Director, Council President, and Council and Region Financial Handbooks: Specific information for use at region and council levels of Utah PTA.



Council Bylaws (2023-2024)

Region _____

Council _____

PTA Unit ID Number _____

Employer Identification Number (EIN) ____ - _____

**Utah PTA Requirements for all councils and/or Local PTAs/PTSAs*

PLEASE NOTE: Only information written in the blanks may be amended. Any other changes will render Bylaws invalid.

ARTICLE I: Name

The official name of this association is the

_____ Council in Region _____ of Parent-Teacher Associations in Region _____ of the Utah Congress of Parents and Teachers (Utah PTA), a branch of the National Congress of Parents and Teachers (National PTA).

developed through conferences, committees, projects, and programs; and governed and qualified by the basic principles set forth in Article III.

Section 3. National PTA is organized exclusively for the charitable, scientific, literary, or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code (referred to as “Internal Revenue Code”).

***ARTICLE II: Purposes**

Section 1. The Purposes of the Utah PTA, in common with those of the National PTA, are

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

Section 2. The Purposes of the National PTA and the Utah PTA are promoted through advocacy and education in collaboration with parents, families, teachers, educators, students, and the public;

***ARTICLE III: Principles**

The following are basic principles of the Utah PTA, in common with those of the National PTA:

- a. The association shall be noncommercial, nonsectarian, and nonpartisan.
- b. The association shall work to engage and empower children, families, and educators within schools and communities to provide quality education for all children and youth, and shall seek to participate in the decision-making process by influencing school policy and advocating for children’s issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- c. The association shall work to promote health and welfare of children and youth, and shall seek to promote collaboration among families, schools, and the community at large.
- d. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in



National PTA.

***ARTICLE IV: Relationship with National PTA and Utah PTA**

Section 1. This Council shall be organized and chartered under the authority of the Utah PTA in the area in which this Council functions, in conformity with such rules and regulations, not in conflict with the National PTA Bylaws, as the Utah PTA may in its Bylaws prescribe. The Utah PTA shall issue to this Council an appropriate charter evidencing the due organization and good standing of this Council. A Council in good standing is one that:

- a. Adheres to the Purposes, Bylaws, basic principles, and procedures of the PTA;
- b. Has Bylaws approved according to the procedures of the Utah PTA;
- c. Compiles a list of incoming officers of each PTA in Council membership and submits it to the Region Director by June 1; and
- d. Has current copies of the following on file with the Region:
 - 1) Year-end financial statements and annual financial reconciliation report by August 1;
 - 2) Applicable IRS filing;
 - 3) Approved annual budget and meeting minutes by October 1; and
 - 4) List of incoming officers with addresses, phone numbers, and email addresses by May 1.
- e. Practices responsible financial procedures;
- f. Has at least two (2) officers attend one PTA leadership training session annually; and
- g. Meets other criteria as may be prescribed by the Utah PTA.

Section 2. A Council PTA is not in good standing if the criteria in Section 1 are not met and shall be:

- a. Ineligible to receive materials or services from National PTA and Utah PTA;
- b. Ineligible for awards;
- c. Ineligible to participate in PTA programs (eg. Reflections, Battle of the Bands, etc.);
- d. Ineligible to receive sales tax refunds; and
- e. After two years of not submitting dues by March 31, reported to the IRS as a Council PTA not in good standing, which results in the loss of tax-exempt status.

A Council PTA not in good standing may be reinstated

to good standing when the Council PTA meets the preceding criteria and sends to the Utah PTA office a letter stating the reason(s) for not meeting the criteria in Section 1.

Section 3. The articles of organization of this Council include (a) the Bylaws of this Council, (b) the certificate of incorporation or articles of incorporation of this Council (in cases in which this Council is a corporation) or the articles of organization by whatever name (in cases in which the Council exists as an unincorporated association) and (c) its charter.

Section 4. This Council shall adopt such Bylaws for the government of this Council as may be approved by the Utah PTA. Such Bylaws shall not be in conflict with the National PTA Bylaws or the Bylaws of the Utah PTA.

Section 5. This Council shall include in its Bylaws provisions corresponding to the Bylaws of the Utah PTA as are identified therein by a single star.

Section 6. Bylaws of this Council shall include a provision establishing a quorum.

Section 7. This Council shall prohibit voting by proxy.

Section 8. Bylaws of this Council shall include an article on amendments.

Section 9. This Council shall keep such permanent books of account and records as shall be sufficient to establish the items of gross income, receipts, and disbursements of this Council, including, specifically, the number of its members and the dues collected from them. Such books of account and records shall at all reasonable times be open to inspection by an authorized representative of the Utah PTA or, where directed by the Utah PTA committee on state and local relationships, by a duly authorized representative of the National PTA.

Section 10. Each officer or Board member of this Council shall be a member of a Local PTA/PTSA within this Council.

Section 11. Only members of a Local PTA/PTSA who have paid dues for the current membership year may participate in the business of this Council.

Section 12. A PTA/PTSA member shall not serve as a voting member of this Council Board while serving as a paid employee of, or under contract to, this Council.

Section 13. This Council must complete the applicable IRS filing at the close of the fiscal year.

Section 14. The association or members in their official capacities shall not, directly or indirectly, participate



or intervene (in any way, including the publishing or distributing of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

Section 15. No part of the net earnings of the association shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers, or other private persons except that the association shall be authorized and empowered to pay reasonable compensation for services rendered, and to make payments and distributions in furtherance of the Purposes set forth in Article II hereof.

Section 16. Notwithstanding any other provision of these articles, the association shall not carry on any other activities not permitted to be carried on (i) by an association exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code or (ii) by an association, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.

Section 17. The charter of this PTA/PTSA (Council in the Council Bylaws) shall be subject to withdrawal and the status of this PTA/PTSA as a local PTA/PTSA (Council) shall be subject to termination, in the manner and under the circumstances provided in the bylaws of the Utah PTA. Dissolution of this PTA/PTSA must follow procedure as outlined in the Utah PTA Bylaws, Local Bylaws, and Local PTA Unit Dissolution Packet. (Council would say: must follow procedure as outlined by Utah PTA at the time of dissolution)

Section 18. This local PTA/PTSA (Council) is obligated, upon withdrawal of its charter by Utah PTA:

- a. To yield up and surrender all of its books, records, assets, and property to Utah PTA.
- b. To cease and desist from the further use of any name that implies or connotes association with National PTA or Utah PTA or status as a constituent association of National PTA or Utah PTA; and
- c. To carry out promptly, under the supervision and direction of Utah PTA, all proceedings necessary or desirable for the purpose of dissolving this PTA/PTSA.

Section 19. Upon the dissolution of this association, after paying or adequately providing for the debts and obligations of the association, the remaining assets

shall be distributed, under the direction of Utah PTA, to one or more non-profit funds, foundations, or associations which have established their tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and whose purposes are in accordance with those of National PTA.

ARTICLE V: Purposes of this Council

Section 1. The purposes of this Council are to:

- a. Unify and strengthen Local PTAs/PTSAs comprising this Council by providing opportunities for leadership training and exchange of ideas and experiences, serving as a channel of communication, and coordinating the efforts of the Local PTAs/PTSAs in Council membership.
- b. Provide for the conference and cooperation of the Local PTAs/PTSAs in Council membership in order to create a public opinion favorable to the interests of children; to encourage programs and projects in the various Local PTAs/PTSAs which will carry out the Purposes and mission of PTA; and to assist in the formation of new PTAs/PTSAs according to the plan of the Utah PTA.
- c. Promote the interests of the National PTA and of the Utah PTA within its territory.

Section 2. This Council shall not legislate for Local PTAs/PTSAs.

ARTICLE VI: Membership and Dues

Section 1. Members in this Council shall consist only of Local PTAs/PTSAs chartered by the Utah PTA in _____ (county, city or area) upon the payment of dues as hereinafter provided.

Section 2. The annual dues for membership in this Council shall be ____ per member in each Local PTA/PTSA in council membership and shall be payable on _____ (date).

Section 3. Additional Local PTAs/PTSAs may be accepted as members at any time.

Section 4. Delegates from Local PTAs/PTSAs whose dues to the Council are in arrears shall not participate in the business meetings of this Council.



ARTICLE VII: Voting Body

Section 1. The voting body of this Council shall consist of the elected officers (executive committee) of this Council, the Council commissioners, the superintendent of schools or his representative, and the designated members of each PTA/PTSA specified in Section 2 of this article.

Section 2. Each member PTA/PTSA shall be entitled to representation on the voting body of this Council by its President or his alternate and President-elect or his alternate (An alternate is selected from their Local PTA/PTSA board.) and the principal or his representative.

Section 3. Members are entitled to one vote even though they may be in more than one position.

ARTICLE VIII: Officers and Their Election

Section 1. The officers of this Council shall abide by, promote, and represent the Purposes, Bylaws, mission, principles, and procedures of PTA.

Section 2. Only members of a Local PTA/PTSA in Council membership whose national, state, and council dues are paid shall be eligible to hold office, to serve on the Board, to serve on a Council committee, or to serve as delegates to this Council.

Section 3. Officers and their election:

- a. The officers (executive committee) of this Council shall be a President, a President-elect, _____ (number, at least 2) Vice Presidents, a Secretary, and a Treasurer. The President-elect shall automatically succeed to the office of President. The executive committee of this Council shall include in the number of Vice Presidents a teacher currently teaching in a school in Council membership (elected on a rotating basis through the schools in Council membership as determined by this Council) and the superintendent or his representative and/or the principal of a different school in Council membership.
- b. These officers shall be elected by ballot by the voting body of this Council at the Council meeting in _____ (month(s), prior to March 31). However, if there is only one nominee for any office(s), upon adoption of a motion from the floor, the election for that office (or those

offices) may be by voice vote.

- c. Officers shall assume their official duties on July 1 following their election, shall serve for a term of _____ year(s), (a term of either one year or two years) and shall remain in office until June 30 of the next election year or thereafter until their successors are elected.
- d. An officer may serve a second consecutive term if nominated and elected by the Council voting body.
- e. A person, except the superintendent Vice President, shall not be eligible to serve more than two (2) consecutive terms in the same office. (Anyone who has served more than one half of a term shall be credited with having served that term.)

Section 4. Nominating Committee:

- a. The nominating committee, which shall nominate an eligible person for each office for which elections are to be held, shall be elected by the voting body of this Council at a Council meeting prior to December 31.
- b. There shall be elected in _____ (month(s), prior to December 31) a nominating committee composed of _____ (number, at least three and always an uneven number) members of the voting body of this Council.
- c. One member of the nominating committee shall be elected by the executive committee from its body and _____ (number) members shall be elected by the voting body of this Council, no two (2) of whom shall be from the same PTA/PTSA. The nominating committee shall elect its own chairman.
- d. It is recommended that the superintendent or his representative and the principals not serve on the nominating committee but act as consultants to it.
- e. There shall also be elected by the voting body of this Council _____ (number, 2 to 5) alternates to the nominating committee. An alternate may attend committee meetings only as the replacement of a committee member. If a member of the nominating committee is unable to attend a meeting, the first alternate may attend only that meeting as a voting member of the committee. If a member of the nominating committee fails to attend two (2) meetings of the committee, he will



be permanently replaced by the first alternate. If a member of the nominating committee is selected for election to an office, that member will be replaced on the committee by the first alternate, continuing replacement by alternates as needed.

- f. Recommendations for nominations may be made to the nominating committee by any PTA/PTSA member in Council membership prior to the first meeting of the nominating committee.
- g. The Council President and President-elect shall not serve on the nominating committee. The President shall orient the committee to its duties and procedures at its first meeting and shall then leave the meeting. The President-elect may act as a consultant to the nominating committee.
- h. No meeting of the nominating committee shall be held with fewer than three (3) members in attendance.
- i. A nominee for any office must be a member of a Local PTA/PTSA in Council membership.
- j. The nominating committee shall nominate an eligible person for each office to be filled. It is recommended that the Council President and President-elect be past Presidents of Local PTAs/PTSAs. If the President-elect is unable to succeed to the office of President, the nominating committee shall nominate an eligible person for President and President-elect.
- k. The nominating committee must report its nominees to the executive committee at least five (5) days prior to its report at the Council meeting in _____ (month(s), at least thirty (30) days prior to the election meeting), at which time additional nominations may be made from the floor.
- l. Only those persons who have signified their consent to serve if elected shall be nominated for or elected to an office.

Section 5. The only additional nominations that may be made from the floor at the election meeting are those persons who have filed their intent to become nominees with the Secretary of this Council at least five (5) days prior to the election meeting. Their names must then be placed in nomination from the floor at the election meeting. Any such persons must be members of a Local PTA/PTSA in Council membership. No additional nominations may be made at the election meeting.

Section 6. Vacancies:

- a. If an office except President-elect remains unfilled after the election, it shall be considered a vacant office to be filled by a person elected by a majority vote of the new executive committee, all members of the new executive committee having been notified. A vacancy in the office of President-elect shall be filled by the vote of the Council voting body at a special election meeting.
- b. If any officer or appointee fails to attend three (3) consecutive meetings without adequate excuse or to perform the duties of his office or position, the members of the executive committee shall meet and declare the office or position vacant.
- c. All resignations must be made in writing to the President.
- d. A vacancy occurring in the office of President shall be filled for the remainder of the unexpired term by the President-elect, who shall then cease to be President-elect. A vacancy occurring in the office of President-elect shall be filled by a vote of the Council voting body at a special election meeting called by the President, all members having been notified. A vacancy occurring in any other office shall be filled for the remainder of the unexpired term by a person elected by a majority vote of the remaining members of the executive committee, all members of the committee having been notified.

ARTICLE IX: Duties of Officers

Section 1. The President shall:

- a. Preside at all meetings of this Council, its Board of Directors, and its executive committee at which he may be present;
- b. Be a member ex officio of all commissions and other committees but shall not serve on the nominating committee or the election committee;
- c. Appoint a parliamentary adviser, subject to the approval of the executive committee;
- d. Appoint the chairmen of special committees;
- e. Orient the nominating committee to its duties and procedures at its first meeting and then leave the meeting;
- f. Help to extend PTA/PTSA work into all parts of



this Council territory, keeping it in harmony with the Utah PTA plan;

- g. Coordinate the work of the officers, commissions, and committees of this Council in order that the Purposes may be promoted; and
- h. Perform such other duties as may be prescribed in these Bylaws or assigned to him by this Council or by its executive committee.

Section 2. The President-elect shall:

- a. Work under and in cooperation with the President and fulfill such other duties as assigned by the Board of Directors or the President;
- b. As appropriate, as President-in-training, attend meetings with the President;
- c. If applicable, serve as a delegate to the Council voting body;
- d. In the absence of the President or his inability to act, perform the duties and exercise the powers of the President; and
- e. Automatically succeed to the office of President at the end of his term.

Section 3. The Vice Presidents shall:

- a. Act as aides to the President;
- b. In their designated order as determined by the executive committee at its first meeting, perform the duties and exercise the powers of the President in his and the President-elects absence or inability to act; and
- c. Perform such other duties as may be provided for in these Bylaws, prescribed by the parliamentary authority, or directed by the President, the Board of Directors, or the executive committee.

Section 4. The Secretary shall:

- a. Record the minutes of all meetings of this Council, its Board of Directors, and its executive committee, including the motions and actions taken;
- b. Have and bring to all meetings a current copy of these Bylaws;
- c. Maintain an accurate and current roster of the names of the Local PTAs/PTSAs in Council membership, the names and addresses of Local PTA/PTSA officers and delegates, and the names and addresses of the members of the Council Board of Directors. This membership record may not be used for any purpose unrelated to members interests as PTA members. It cannot be used for

solicitations, commercial purposes, partisan or political purposes, or be sold or purchased.

- d. Conduct correspondence; and
- e. Perform such other duties as may be provided for in these Bylaws, prescribed by the parliamentary authority, or directed by the President, the Board of Directors, or the executive committee.

Section 5. The Treasurer shall:

- a. Have custody of and be responsible for all funds of this Council, counting all money with three (3) people present and depositing all money in the bank the same day received;
- b. Collect and keep a full and accurate account of receipts and expenditures of all moneys of this Council;
- c. Develop, with the executive committee, an annual budget to be distributed to and approved by the voting body of this Council at the first Council meeting (prior to October 1) of the school year;
- d. Make disbursements as authorized by the President, executive committee, or this Council, in accordance with the budget adopted by this Council;
- e. Co-sign all checks with the President, President-elect, or Secretary (No two officers who are related by blood or marriage or reside in the same household may be signers on the checking account.);
- f. Present a financial statement at each meeting of this Council and at other times when requested by the executive committee;
- g. Make a financial report at the last Council meeting of the school year in _____ (month), (same as in Article XI, Section 7), which shall be known as the annual meeting, and submit a full written financial report to the incoming executive committee no later than June 30;
- h. Be responsible for the maintenance of such books of account and records as conform to the requirements of Article IV, Section 8 of these Bylaws; and
- i. Submit the books annually no later than June 30 and upon the change of officer for a reconciliation by an auditor or an Annual Financial Reconciliation (AFR) committee.

Section 6. The books of the Treasurer shall be



reconciled annually by an auditor or an AFR committee of not fewer than three (3) members, who, satisfied that the treasury accounts are correct, shall sign a statement of that fact.

- a. The auditor or AFR committee shall be appointed by the executive committee. Members of the AFR committee shall be members of a Local PTA/PTSA in Council membership.
- b. The auditor or any member of the AFR committee shall not be any officer who may sign the checks or be related to, by blood or by marriage, or reside in the same household with, any of the officers who may sign the checks of this Council.
- c. No later than June 30 the books and records of the Treasurer shall be closed (no additional expenses incurred, checks written, nor bank transactions made) and shall be given to the auditor or the AFR committee. The incoming officers shall assume no financial responsibilities nor obligations until July 1.
- d. The auditor or AFR committee shall submit its report to the new executive committee no later than August 1, and the report shall be presented for adoption at the first Council meeting of the new school year.
- e. The incoming executive committee shall not accept unreconciled financial records.
- f. In the event of a vacancy in the office of Treasurer, the books shall be reconciled before the new Treasurer takes office.

Section 7. All officers shall:

- a. Perform the duties prescribed in the parliamentary authority, in addition to those outlined in these Bylaws and those assigned from time to time; and
- b. In case of resignation without delay, or upon the expiration of their term of office no later than July 10, deliver to their successors all official materials pertaining to their office.

ARTICLE X: Executive Committee

Section 1. The executive committee shall consist of the elected officers of this Council.

Section 2. The duties of the executive committee shall be to:

- a. Plan and determine the dates of Council meetings;
- b. Transact such business as may be referred to it by this Council;
- c. Determine at its first meeting of the school year, the designated order in which the Vice Presidents perform the duties of the President in his and the President-elects absence or inability to act;
- d. Create commissions and special committees and appoint commissioners;
- e. Approve the plans of work of Council commissions and special committees;
- f. Develop an annual budget to be distributed to and approved by the voting body of this Council at the first Council meeting (prior to October 1) of the school year;
- g. Approve routine bills within the limits of the budget;
- h. Require all checks to have two (2) signatures;
- i. Report at the regular meetings of this Council;
- j. Act in emergencies between meetings of this Council;
- k. Fill vacancies in offices except President-elect; and
- l. Appoint an auditor or an AFR committee to reconcile the Treasurer's accounts.

Section 3. During the transition period between their election and June 30, the incoming officers shall meet as needed to coordinate with the outgoing officers, prepare for their term of office, formulate their tentative plans and proposed budget, schedule their calendar, and appoint commissioners and committee chairmen with the advice of the Local PTA/PTSA Presidents and shall attend the Utah PTA convention in May. The incoming officers shall assume no financial responsibilities nor obligations until July 1.

Section 4. There shall be an executive committee and/or Board of Directors meeting prior to each Council



meeting. A majority of the members shall constitute a quorum. Special meetings of the executive committee may be called by the President or upon the request of a majority of the members of the committee, all members of the committee having been notified.

ARTICLE XI: Meetings

Section 1. Regular meetings of this Council shall be held in the months of _____

_____ unless otherwise provided for by this Council or executive committee. _____ (number) days' notice shall be given of a change of date.

Section 2. Special meetings of this Council may be called by the President and shall be called upon request of a majority of the members of the executive committee or Board of Directors or a majority of the Local PTAs/PTSAs in Council membership. At least five (5) days' notice of such special meeting shall be given.

Section 3. The nominating committee shall be elected at a Council meeting prior to December 31.

Section 4. The nominating committee shall be elected at the Council meeting in _____ (month(s), same as in Article VIII, Section 4b).

Section 5. The nominating committee shall report its nominees at the Council meeting in _____ (month(s), same as in Article VIII, Section 4k).

Section 6. The election meeting shall be held in _____ (month(s), same as in Article VIII, Section 3b).

Section 7. The last Council meeting of the school year held in _____ (month(s), same as in Article IX, Section 5g) shall be known as the annual meeting and shall be for the purpose of receiving reports of officers, commissions, and committees and conducting any other business that may arise.

Section 8. Members of the PTAs/PTSAs holding membership in this Council may attend, without the right of voice or vote, all meetings of this Council but may be granted permission to speak at these meetings provided they have contacted the presiding officer of the meeting and requested to be placed on the agenda.

Section 9. A quorum for the transaction of business in any meeting of this Council shall consist of at least two (2) Council officers and at least one delegate each from

a majority of the member PTAs/PTSAs.

ARTICLE XII: Commissions, Board of Directors, and Special Committees

Section 1. Only members of a Local PTA/PTSA in Council membership whose national, state, and Council dues are paid shall be eligible to serve in any elected or appointive position of this Council. The term of each appointee shall be for one year, and he may be reappointed for another year.

Section 2. The executive committee shall create such commissions as may be deemed necessary to promote the Purposes and carry on the work of this Council.

Section 3. The commissioners shall be appointed by the executive committee of this Council.

Section 4. The executive committee and the commissioners comprise the Board of Directors of this Council. Regular meetings of the Board of Directors shall be held during the year, the time to be fixed by the Board members at its first meeting of the school year. A majority of the Board of Directors shall constitute a quorum. Special meetings of the Board of Directors may be called by the President or by a majority of the members of the Board, all members of the Board having been notified.

Section 5. The executive committee may create such special committees as it or this Council may deem necessary to promote the Purposes and carry on the work of this Council.

Section 6. Inasmuch as a special committee is created for a specific purpose, it automatically goes out of existence when its work is done and its final report is received by the executive committee.

Section 7. Each commissioner and committee chairman shall present a plan of work to the executive committee for approval. No work shall be undertaken without the consent of the executive committee.

Section 8. The majority of any commission or committee shall constitute a quorum.

Section 9. The President shall be a member ex officio of all commissions and other committees but shall not serve on the nominating committee nor election committee.



ARTICLE XIII: Fiscal Year

The fiscal year of this Council shall begin on July 1 and end the following June 30.

ARTICLE XIV: Reading and Renewal of the Bylaws

These Bylaws shall be reviewed by the executive committee at the beginning of each school year and shall every three (3) years be presented to the Council voting body and reaffirmed by a two-thirds vote of the members present and voting and sent to the Utah PTA for renewal.

ARTICLE XV: Parliamentary Authority

The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern this Council in all cases in which they are applicable and in which they are not in conflict with these Bylaws, the Bylaws of the Utah PTA, the National PTA Bylaws, or the articles of incorporation.

ARTICLE XVI: Amendments

Section 1.

- a. Only information written in the blanks of these Bylaws may be amended at any regular meeting of this Council by a two-thirds vote of the voting body present and voting, provided that written notice of the proposed amendment shall have been given to each PTA/PTSA in Council membership and to each member of the Board of Directors at least thirty (30) days prior to the meeting at which the amendment is voted upon, that a quorum has been established, and that the amendment is then sent to the Utah PTA for approval.
- b. After approval by a two-thirds vote at a meeting of this Council, six (6) copies of all amendments or revisions shall be sent to the Utah PTA for approval.

Section 2. The adoption of an amendment to any provision of the Bylaws of the Utah PTA identified by a single star except for those single star provisions that apply specifically and solely to Local PTAs and PTSAs, shall serve automatically and without the requirement of further action by this Council to amend correspondingly the Bylaws of this council. Notwithstanding the automatic character of the amending process, this council shall promptly incorporate such amendments into its Bylaws.

July 2021



Local/Council PTA/PTSA Form for Recommending Nominees for Officers, Directors, Commissioners and Representatives for PTA/PTSA.

Please turn into the Nominating Committee Chair

Job descriptions are available in the President Handbook.

Name of Suggested Nominee _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Daytime Phone _____

This person would like to be nominated for the office or positions of director, commissioner, or representative

_____ of the _____ PTA/PTSA
(position) (name of the PTA/PTSA)

Current PTA/PTSA Position _____

PTA/PTSA Experience:

Does this person meet the criteria in Article VI, Section 4 (local bylaws)? _____

Would this person accept another position other than the one for which recommended? _____

Leadership Experience: _____

Qualifications for this position:

Current PTA/PTSA Member

Must include a current biography and picture with the application

Consent from nominee has been obtained: _____

Signature of person submitting this recommendation

Phone



(School Name) PTA/PTSA PTA/PTSA Board Nominees Report

President: _____

President-elect: _____

Treasurer: _____

Secretary: _____

Legislative Vice President: _____

Membership Vice President: _____

These nominees' names will be posted for 30 days, starting (give dates). The election will take place on _____ at _____ in the _____ School. If anyone would like to run for
(date) (time) (location)

any of the elected positions, they will need to submit their name to this _____ PTA/PTSA
(school)
secretary _____ @ _____ by _____, _____.
(name) (email) (date) (time)

If you have any questions, please contact (name of Nominating Committee chair).

The _____ School PTSA Nominating Committee are (names of Nominating Committee members)
(name of school)

*This page is an example of how the Nominating Committee will report the nominees for elected positions.
You can make changes to fit your PTA/PTSA as needed.*

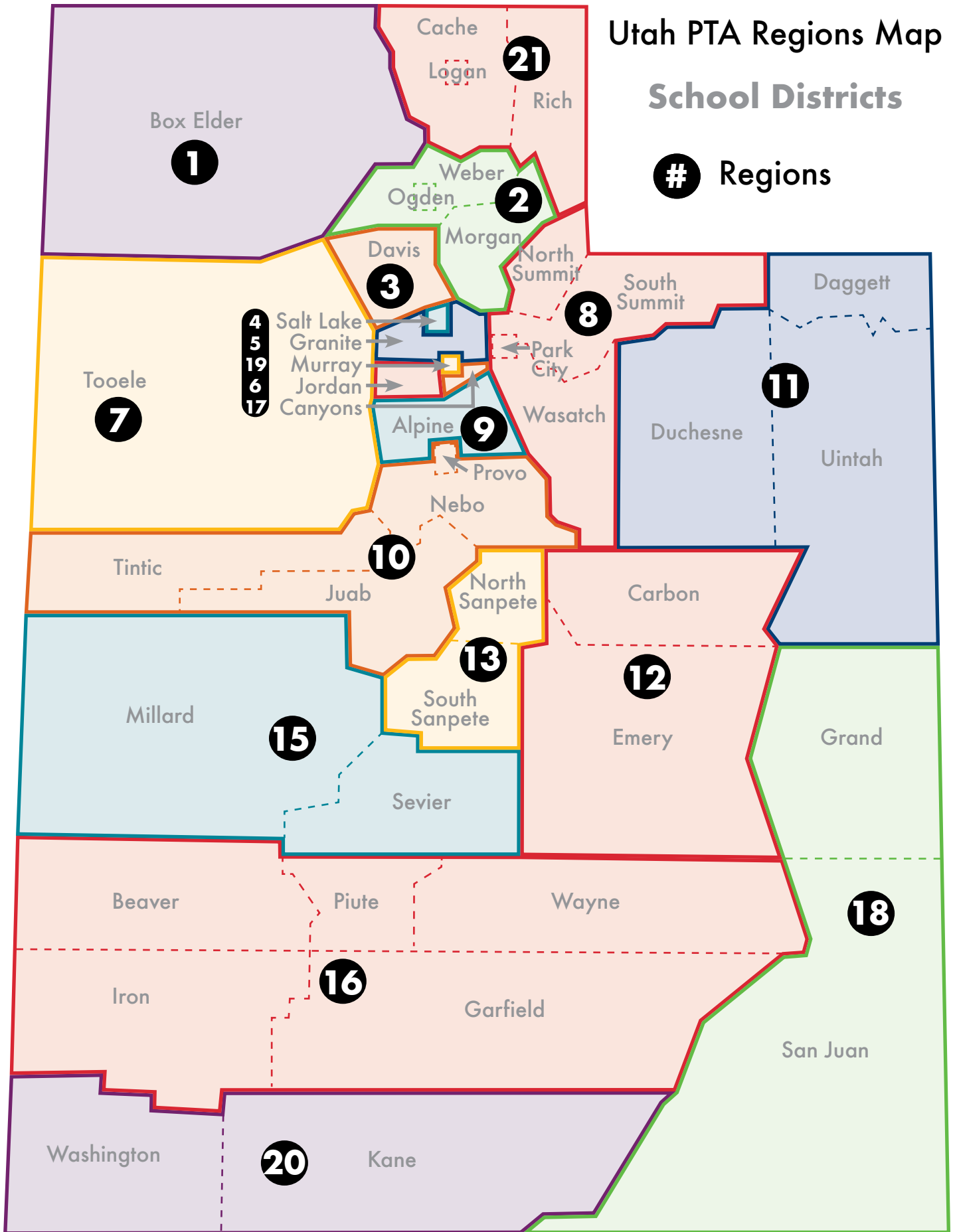




Utah PTA Regions Map

School Districts

Regions





CONNECT

UTAH PTA

5192 S. Greenpine Drive
Salt Lake City, UT 84123

Phone: (801) 261-3100

Fax: (801) 261-3110

Kids@UtahPTA.org

UtahPTA.org

Monday - Thursday

9:00 am - 3:00 pm

Closed Friday | Closed holidays

Please call before you come to ensure office is open.

NATIONAL PTA

1250 N. Pitt Street

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