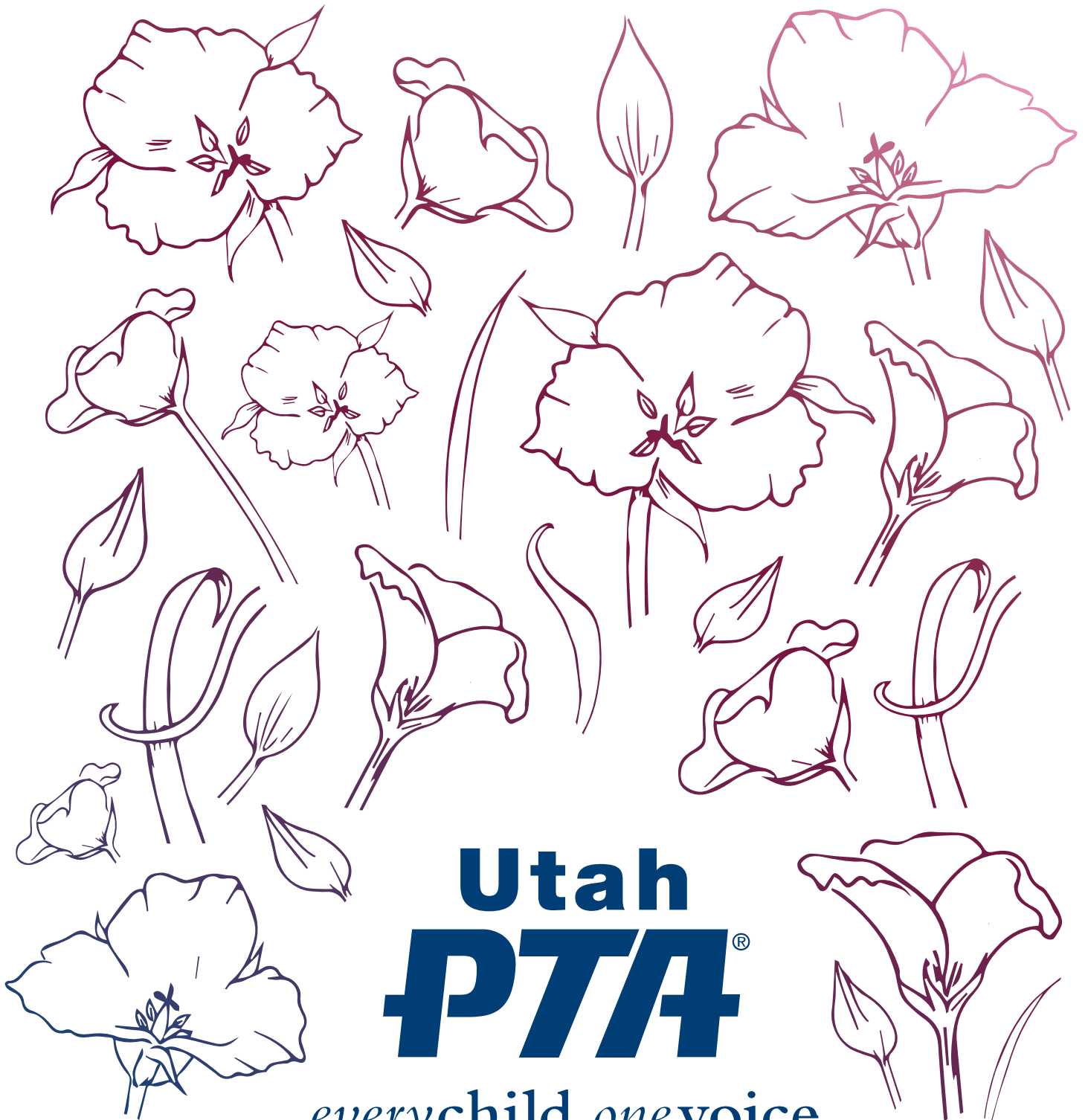


2023 UTAH PTA HANDBOOK

PRESIDENT



Utah
PTA[®]

everychild. one voice.

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* online 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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UTAH PTA PRESIDENT'S MESSAGE

Dear Presidents,

Thank you for being willing to serve the students in your school as part of the biggest team of volunteers advocating for and serving the children in Utah. Each one of you are making a difference in the lives of children in your community, your school and in the state of Utah.

We are all better together as team PTA because of the time you have given in each area. Thank you for being a great team player in team PTA.

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children. PTA gives parents a united and powerful voice, a seat at the decision making table and the tools to influence change that will better the lives of all children. The ability to speak for every child with one voice is the Power of PTA.

Utah PTA provides valuable training and tools to help you succeed as the president. The bylaws will help answer questions, please read through and become familiar with the PTA's bylaws. Utah PTA website has many ideas and tools to help you as a leader of PTA. Attend training through council, region, and state training. Join the Utah PTA Facebook groups so you can ask questions and receive ideas. Read and review the President's Handbook. Strive to become a Gold Star PTA and apply for awards and grants. Learn skills to become a more effective leader. Utah PTA is here to support you and your board.

Empower board members to serve in their positions. Welcome all perspectives. Listen and communicate with others. Collaborate with the school and community as partners working to provide opportunities for the children. Focus on the mission.

Thank you for the many hours you have sacrificed to make a difference in the lives of children. I hope you have a wonderful and successful year.



Corey Fairholm

Utah PTA President 2023-2025



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

PTA has established guidelines for the proper use of the PTA name, logos, and tagline (*everychild.onevoice*). When used properly, PTA's logo and tagline create a consistent message, help to unify all PTAs, and set PTA apart from the competition.

The success of our PTA brand identity system depends on all PTAs' adherence to the established guidelines.

A custom logo for your PTA/PTSA can be created by going to the link below. To ensure your logo is brand compliant, please do not alter the logo. PTA blue (Pantone 541c), black and white are the only compliant color options. Do not add clip art or designs around your logo. Do not add drop shadows, outlines or any additional effects to your logo.

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.



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Purposes of PTA

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

PTA Values

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



WHY BE A PTA SCHOOL?

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

A PTA School:

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

504	Formal plan for children with disabilities for academic support and success	NEA	National Education Association
ABC	Anti-Bullying Coalition	NEA	National Endowment for the Arts
ACEES	Advisory Committee on Equity of Educational Services for Students	NSBA	National School Boards Association
ADHD	Attention Deficit Hyperactivity Disorder	PCAU	Prevent Child Abuse Utah
AFT	American Federation of Teachers	PD	Prevention Dimensions
AFR	Annual Financial Reconciliation	PR	Public Relations
ASTL	Advocates For School Trust Lands	PTA	Parent-Teacher Association
CAP	Community Action Partnership	PTSA	Parent-Teacher-Student Association
CCRR	College and Career Readiness Plans	RD	Region Director
CCSSI	Common Core State Standards Initiative	RISE	Readiness, Improvement, Success, Empowerment
CHADD	Children and Adults With Attention Deficit/Hyperactivity Disorder	SAFE UT	Helpline App
CHIP	Children's Health Insurance Program	SCC	School Community Council
CP	Council President	SAP	Student Assistance Program
DARE	Define, Assess, Respond, Evaluate - Substance Abuse Prevention Program	SAR	Students at Risk
DCFS	Division of Child and Family Services	SEA	State Education Agency
DOE	Department of Education	SOEP	Statewide Online Education Program
DSAMH	Utah Division of Substance Abuse and Mental Health	SSARAC	State Students at Risk Advisory Committee
DWS	Department of Work Force Services	TANF	Temporary Assistance for Needy Families
EC	Executive Committee	UAESP	Utah Association of Elementary School Principals
EIN	Employer Identification Number	UASCD	Utah Association of Supervision and Curriculum Development
EML	Engaging Minority Leadership	UASSP	Utah Association of Secondary School Principals
ESEA	Elementary Secondary Education Act	UCCJJ	Utah Commission on Criminal and Juvenile Justice
ELL	English Language Learner	UDOH	Utah Department of Health
ESSA	Every Student Succeeds Act	UEA	Utah Education Association
FAS/FAE	Fetal Alcohol Syndrome/Fetal Alcohol Effects	UETN	Utah Education Telehealth Network
FSP	Family-School Partnerships	UFPN	Utah Family Partnership Network
GED	Graduation Equivalency Diploma	UHS	Utah Highway Safety
ICAC	Interagency Crimes Against Children	UHSA	Utah Home Schools Association
IEP	Individualized Education Program	UPEC	Utah Public Education Coalition
IGP	Intergenerational Poverty	USBA	Utah School Boards Association
IRS	Internal Revenue Service	USBE	Utah State Board of Education
LAC	Legislative Advocacy Committee	USC	Utah Safety Council
LEAP	Leadership, Excellence, And Partnersshipping	USDE	United States Department of Education
LEA	Local Education Agency, School District or Charter School	USSA	Utah School Superintendents Association
LEP	Limited English Proficiency	UTPS	Utahns for Public Schools
LIC	Local Interagency Council	WATCH	Dads of Great Students
MADD	Mothers Against Drunk Driving	D.O.G.S.	
NAEP	National Assessment of Educational Progress	WPU	Weighted Pupil Unit
NAMI	National Alliance on Mental Illness		



UTAH PTA PAST PRESIDENTS



Back row: Darlene Hutchison, Dawn Davies, Carmen Snow, Ilene Mecham, Linda Parkinson, Marilyn Simister
Front Row: Jeana Stockdale, Gainell Rogers, Stacey Mollinet, Liz Zentner, JoAnn Nielson

2021-2023: Stacey Mollinet

2019-2021: Laney Benedict

2017-2019: Jeana Stockdale

2015-2017: Dawn Davies

2013-2015: Liz Zentner

2011-2013: Gainell Rogers

2009-2011: Ilene Mecham

2007-2009: Marilyn Simister

2005-2007: Carmen Snow

2003-2005: JoAnn Neilson

2001-2003: Susan Dayton

1999-2001: Colleen Taylor

1997-1999: Barbara Willie

1995-1997: Linda Parkinson

1993-1995: Mareid Horton

1991-1993: Joyce Muhlestein

1989-1991: Pat Hales

1987-1989: Darlene Gubler

1985-1987: Lenora Plowthow

1983-1985: Donna Davies

1981-1983: Gayle Judd

1978-1981: Darlene Hutchison

1976-1978: Mrs. Jack Smith

1974-1976: Dixie Nelson

1972-1974: Joan Burnside

1970-1972: Lila Bjorklund

1967-1970: Mrs. Youngs McGregor

1964-1967: Mr. Rowan C. Stutz

1961-1964: Mrs. James W. Urie III

1959-1961: Dr. Ellvert H. Himes

1958-1959: Mrs. George H. Jones

1955-1958: Mrs. Cecil Baker

1952-1955: Mrs. Donald E. Rose

1947-1952: Mrs. Charles L. Walker

1945-1947: Mrs. Eric A. Johnson

1943-1945: Mrs. Edmund P. Evans

1938-1943: Mrs. Lee K. Nicholson

1935-1938: Mrs. Arch J. West

1931-1935: Mrs. John K. Hardy

1925-1931: Mrs. William Reid





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WELCOME, PRESIDENT!

You have an exciting opportunity to make a difference in your school and community by implementing PTA's Mission:

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

Keep PTA's Mission in mind as you plan your year.

A PTA President's Roles and Responsibilities

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- ♦ Chairing regular board and general meetings to discuss the plans and business of your PTA
- ♦ Taking an active role in financial and legal obligations, including knowing how to stay in good standing with Utah PTA
- ♦ Being familiar with the bylaws
- ♦ Knowing the responsibilities of the members of the board
- ♦ Serving as a liaison with school administration or community partners
- ♦ Checking in regularly with officers and committees to ensure the overall plan is on target
- ♦ Identifying challenges and inviting solutions
- ♦ Familiarizing yourself with all PTA programs and resources
- ♦ Representing PTA to the community
- ♦ Being in communication with council, region, and state PTA to get any important notices and other information
- ♦ Maintaining ongoing communication with members
- ♦ Recruiting and mentoring volunteers and future leaders
- ♦ Volunteering at events, when available

Great presidents often have leadership, planning, and public speaking skills and experience.

“Leaders become great, not because of their power, but because of their ability to empower others.”

– John C. Maxwell, “The 5 Levels of Leadership”



PRESIDENT'S RESPONSIBILITIES

You Are Accountable For:

Bylaws—Are they current or is it time to renew? (Renew every three years according to the approval and expiration dates on the front page of your bylaws in red.) A copy of your bylaws is available on your unit page under “My Account” on UtahPTA.org. Information on renewing your bylaws can be found at utahpta.org/bylaws.

Parliamentary Procedure—Guide can be found later in this section. This is a helpful tool to keep order when conducting meetings.

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

Records/Minutes

- ◆ Any motions made at any of your PTA meetings need to be recorded.
- ◆ Copy of approved budget (including minutes of the meeting where the budget was approved) should be submitted in MemberHub or through the council or region.
- ◆ Be aware of retention dates (how long to keep financial records).

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

Membership

- ◆ **Membership dues are not a fund raiser.** Send in by the 25th of each month to Utah PTA.
- ◆ Inform parents and help them understand what they receive for the Utah PTA and National PTA portions of membership dues in the Membership section of this handbook.
- ◆ Continue membership drives throughout the year at Back-to-School Night, parent/teacher conferences, and all PTA events.
- ◆ Have a membership database. Retain membership by keeping people informed.
- ◆ Apply for membership awards in the Membership section of this handbook and on UtahPTA.org/Membership-Awards.

Awards—Recognition is an important factor in retaining quality volunteers. Be aware of deadlines and requirements in the Awards section of this handbook and on UtahPTA.org/Utah-PTA-Awards.

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

Procedure Book—Contains local board information and duties of commissioners. President's Tools section of this handbook and on UtahPTA.org/Procedure-Books.

All Reports—Must be submitted online (three times a year). Information on reports is at the end of this section and on UtahPTA.org/Reports.



RESPONSIBILITIES OF PTA LEADERS

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

WHY PRESIDENTS SUCCEED

They:

- ♦ Remember to have only one agenda - the children.
- ♦ Make each member feel welcome.
- ♦ Help each member understand the association's Purposes and Mission statement.
- ♦ Have a positive attitude.
- ♦ Read the bylaws and President Handbook.
- ♦ Become familiar with the resources available at UtahPTA.org.
- ♦ Attend all required trainings and meetings.
- ♦ Read all information received.
- ♦ Use and follow an agenda.
- ♦ Arrange activities in which all members can participate.
- ♦ Distribute material to appropriate officers or chairs.
- ♦ Delegate the work.
- ♦ Use the correct channel when they need help.
- ♦ Train on leadership skill needs of your board.
- ♦ Build an effective PTA team.
- ♦ Create a climate of support and mutual respect where people feel they can contribute and grow.
- ♦ Include representation from all areas of the school community.
- ♦ Attend and encourage others to attend convention, conferences, and trainings.
- ♦ Remember to say, "Thank you. You did a great job."



TRANSITION PERIOD

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

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

When Does the Transition Period Begin?

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

Write It Down, Clean It Out, Pass It On

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

Support the New PTA Leadership!

- ♦ **Back away**—let new leaders gain confidence, try new ideas, improve on the past good work, and become stronger.
- ♦ **Be available**—be a resource providing practical guidance and continuity.



LOCAL PTA/PTSA PRESIDENT'S CHECKLIST

- Obtain a copy of your local PTA Bylaws from outgoing president or UtahPTA.org and review with elected officers.
- Study local PTA Bylaws. Are they current (renew every three years)? Check date in red on front page.
- On your bylaws, locate your PTA Unit ID Number EIN (for banking purposes and IRS filings), and your membership dues information.
- Fill board positions (other than those which are filled by elections) with appointees. Include representation from all areas of your school community and others concerned about children.
- Meet with your outgoing PTA president for helpful information and transfer of PTA materials.
- Use your transition time (from election until July 1) wisely:
 - ◆ Meet with your principal
 - ◆ Plan your calendar year
 - ◆ Prepare budget
 - ◆ Conduct a needs assessment with your general membership
 - ◆ Meet with your board members individually and share visions
 - ◆ Meet with your board to plan your year
 - ◆ Plan membership goals
- Meet with the outgoing treasurer to make name changes at the bank (after July 1).
- Make sure that you and all of your board members understand their responsibilities and receive training.
- Obtain procedure books from the outgoing board members for your board and update where needed.
- Find out if you are in a council. If you are, find out who your council president is, when she/he will hold meetings, and the amount of council dues. Council (or region) meetings are your link to Utah PTA. It is recommended that your president-elect and principal attend with you. If you cannot attend, you should send your president-elect or a representative from among your board officers.
- Know what region you are in and who your region director is. Be aware of and attend any trainings or meeting held for local PTA leaders at the region level.
- In consultation with your other officers, appoint a commissioner and/or chair to oversee each individual project or program identified from your needs assessment.
- Assist the treasurer, with input from your Executive Committee and commissioners or project chairs, to prepare a budget for the coming year. Plan goals established as a result of the needs assessment. Make sure funds are available for leadership training.
- Study this Utah PTA President Handbook. Review report forms (three per year) for which you are responsible. Make a note of the due dates on your calendar.
- Make sure the outgoing treasurer has completed a year-end financial report and that the books are prepared for the Annual Financial Reconciliation (AFR). (The AFR must be completed by August 1.)



- Receive a copy of the AFR and have the treasurer present it to the membership at the first general membership meeting of the school year.
- Following the completion of the AFR, make sure that the appropriate IRS filing (“Form 990EZ” or “990N”) is submitted online by the requested deadline.
- Attend pre- and/or post-convention trainings held at the council or region level. Attend Utah PTA Leadership Convention with your board members. Make note of the workshops offered and bring committee chairs accordingly, especially the Reflections chair. The fund raising chair should attend and pay particular attention to the vendors’ fair. Convention can also be attended virtually.
- Have your board sign the “PTA/PTSA Ethics/Conflict of Interest Policy” and the “Basic Fiscal Management Procedures” in the financial section. These are due September 15.
- Become aware of the annual Utah PTA legislative priorities and attend all advocacy conferences.
- Meet on a regular basis with your principal, who is a vice president of your PTA. Remember he/she manages the school and you manage the PTA.
- Attend all meetings where local PTAs should be represented, including district school board meetings.
- Meet with your board at least once a month or when needed.
 - ◆ Prepare an agenda for every meeting you conduct. Send it out one week prior to each meeting.
 - ◆ Make sure volunteer hours are collected at each meeting.
 - ◆ Have your principal report on school calendar each meeting.
 - ◆ Have treasurer report each month.
 - ◆ Start on time and end on time.
- At the end of your term, show appreciation to your board and volunteers.
- At the end of the year, make sure the treasurer’s books are submitted for an AFR. The Executive Committee appoints an AFR Committee (non-check signers) or auditor. (The AFR must be completed by August 1.)
- Your term is from July 1–June 30. Transition is from your election through the end of June. (The books are closed on June 30.)
- If you or a member of your board is not a member of the school community council, assign a board member to observe school community council meetings. PTA is the watchdog of trust land funds.



STANDARDS OF AFFILIATION

According to the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1, the following need to be adhered to be a unit in good standing.

Required by	#	Requirement	Fiscal Year	Best Practices/Specifics (Utah PTA Fiscal Year is July 1- June 30)	Date(s) Completed
Utah PTA, IRS	1	Bylaws followed	Current	Adheres to the purposes, bylaws, basic principles and procedures of the PTA	
Utah PTA, IRS	2	Membership dues paid	Current and Prior	Remits all National PTA and Utah PTA portions of the dues to Utah PTA by the 25th of each month (not applicable to Councils)	
Utah PTA	3	Bylaws approved every 3 years	Current	Bylaws must be current to participate in Utah PTA sponsored activities (Battle of the Bands, Reflections, awards, sales tax refund)	
IRS, Dept of Consumer Protection, Utah PTA	4	Year end financial review/ Annual Financial Reconciliation	Current and Prior	Year End Financial Review was conducted by August 1 and the Annual Financial Reconciliation (AFR) completed by August 1	
IRS	5	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than August 1	
Utah PTA	6	Budget approved	Current	Budget was approved by the membership by October 1 with meeting minutes	
Utah PTA	7	Office Names/ Contact Info	Current	List of incoming officers with addresses, phone numbers, and email addresses on file with Utah PTA	
State of Utah	8	Proof of Insurance	Current	Purchased appropriate insurance by October 1	
Utah PTA	9	Forms Signed	Current	Signed Conflict of Interest form and Basic Fiscal Management Form	
Dept of Consumer Protection, Utah PTA	10	Financial Procedures	Current	Three money counters, two signers on all checks and money is deposited into bank account immediately following any event	
Dept of Consumer Protection, Utah PTA	11	Financial Procedures	Current	Principal must sign each check request form	
Utah PTA	12	Training for leaders	Current	At least two (2) officers attend one PTA leadership training session annually	



STANDARDS OF AFFILIATION

According to the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1, the following need to be adhered to be a unit in good standing.

Required by	#	Requirement	Fiscal Year	Best Practices/Specifics (Utah PTA Fiscal Year is July 1- June 30)	Date(s) Completed
Utah PTA, IRS	13	Minutes	Current	Minutes must be taken an approved at every PTA board meeting, general membership meetings, and PTA committee meetings	
Utah PTA	14	Nominating Committee Elected	Current	PTA members were elected to an nominating committee to nominate an eligible person for each officer of elections are to be held	
Utah PTA	15	Elections	Current	Officers of this PTA/PTSA shall be one (1) President, one (1) President-elect, one (1) administrative vice president, one (1) teacher vice president, one (1) Secretary, and one (1) Treasurer	
Utah PTA	16	Reports	Current	Reports #1, #2, and #3 submitted by associated due dates	

Utah PTA Standards of Affiliation to be in Good Standing for each PTA unit (local and council)

According to the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1, the following need to be adhered to be a unit in good standing.

1. Adheres to the Purposes (Local Bylaws, Article II), Bylaws, basic principles (Local Bylaws, Article III), and procedures of the PTA.
2. Remits all National PTA and Utah PTA portions of the dues to the Utah PTA by the 25th of each month. (Local Bylaws Article IV)
 - A. To be considered a unit in good standing, membership needs to be more than 10 members (Utah PTA Bylaws, Article IX: Members and Dues, Section 5)
3. Has Bylaws approved according to the procedures of the Utah PTA
4. Has current copies of the following on file with the council and/or the region: (Local Bylaws Article IV)
 - A. Year-end financial statements and annual financial reconciliations report by August 1
 - B. Applicable annual IRS filing by September 1
 - C. Approved annual budget and meeting minutes by October 1
 - D. List of incoming officers with addresses, phone numbers and email addresses by May 1



- E. Proof of insurance by October 1
 - F. Signed Conflict of Interest Form and Basic Fiscal Management Form by October 1
5. Practices responsible financial procedures:
 - A. Three money counters (Local Bylaws, Article VII, Section 5 a)
 - B. Two signers on all checks (Local Bylaws, Article VII, Section 5 e)
 - C. Money is deposited into the bank account immediately following the event (Local Bylaws, Article VII, Section 5 a)
 6. Has at least two (2) officers attend one PTA leadership training session annually; (Local Bylaws Article IV)
 - A. Utah PTA Annual Leadership Convention, PTA Advocacy Conference, PTA Day at the Capitol
 - B. Region Convention training
 - C. Other applicable PTA Training
 7. Meets other Criteria as may be prescribed by the Utah PTA.
 - A. Minutes must be taken and approved at every PTA board meeting, General Membership Meetings, and PTA committee meetings (Local Bylaws, Article VII: Duties of Officers, Section 4 a.)
 - B. Nominating Committee
 - 1) The nominating committee shall nominate an eligible person for each office for which elections are to be held (Local Bylaws, Article VI: Officers and Their Elections, Section 5 a)
 - C. Elections
 - 1) Officers shall be, one (1) president, one (1) president-elect, one (1) secretary, one (1) treasurer and at least two (2) VPs, which include Principal & Teacher. (Local Bylaws, Article VI: Officers and Their Elections, Section 4 a)
 - D. Reports #1, #2, #3 submitted by due date (Utah PTA President Handbook, Tools, Page 59 guy)

If the standards of affiliation are not followed, the local PTA unit will be ineligible to receive materials or services from National PTA and Utah PTA, ineligible for awards, ineligible to participate in PTA Programs (Reflections, Battle of the Bands), ineligible to receive voting privileges at Utah PTA conventions; ineligible to receive sales tax refunds; and after two years of not submitting dues by March 31, reported to the IRS as a local PTA/PTSA not in good standing, which results in the loss of tax-exempt status and charitable solicitations (Local Bylaws, Article IV, Section 2).



ORGANIZE YOUR BOARD

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

Your board members should:

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

Elected

- ♦ President
- ♦ President-elect
- ♦ Secretary
- ♦ Treasurer
- ♦ Vice presidents—i.e. leadership, legislative, etc., including your principal and teacher (see Article VI; section 4 for required number.)
- ♦ Commissioners—if your bylaws state they are elected (most PTAs/PTSAs appoint them)

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

Appointed

All other local board members

May have commissioners over:

- ♦ Community engagement/volunteers
- ♦ Education
- ♦ Family Life
- ♦ Individual development/Reflections/character education
- ♦ Health
- ♦ Safety
- ♦ Student Leadership/PTSA
- ♦ Other positions as needed

Could have appointees for:

- ♦ Public relations/communications
- ♦ Reflections
- ♦ Membership
- ♦ Fund-raising
- ♦ Teacher appreciation
- ♦ Newsletters
- ♦ Diversity and inclusivity
- ♦ Special needs
- ♦ Military families
- ♦ Male engagement
- ♦ Healthy lifestyles
- ♦ School board meeting - if the president cannot attend - another officer may represent your PTA and report on any pertinent information
- ♦ Ribbon weeks
- ♦ Book fair
- ♦ Field day
- ♦ Hospitality
- ♦ Teacher appreciation
- ♦ Fundraising
- ♦ STEM night
- ♦ Art week



SAMPLE BOARD OF DIRECTORS

Local Bylaws Article X, Section 4

Executive Committee

Article VI, Section 4a
Elected by membership

VPs	Teacher VP	Principal VP	President	President-elect	Secretary	Treasurer
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Article VI, Section 4a - Tells you the number of VPs to have - includes Teacher and Principal VPs

Commissioners

Article X, Section 2-3 - Appointed or elected, tells you how many to have

Community Engagement	Education	Family Life	Health	Individual Development	Safety	Student Leadership
Room Parents Staff Appreciation Student Stores Holiday Stores Holiday Celebrations Carnival Celebrations Carnival Fundraiser	Read-a-thon Spelling Bee Stem Nights Book Fair Parent Events Reading Week Geography Bee Junior Achievement	Take your Family to School Week Fun Family Nights Parent Education Night Family Dinner Night Outs	Red Ribbon Week Fitness Week Track Team Field Day Maturation Eye screenings	Reflections Talent Show Character Education Program Yearbook Arts Week	Bike Rodeo Green Ribbon Week White Ribbon Week Crossing Guards Seatbelt Check	Open House Battle of the Bands Charitable Drive Safety Patrol Parent Teacher Conference Welcome Spirit Days

Required Committees

Article VIII, Section 3 - Transition time for newly elected officers
Article IV, Section 1 - PTA in good standing

AFR
Nominating Committee
Election Committee

Special Committees

Article X, Section 5 - Special committees are generally one time committees that help meet a specific purpose
Here are a few ideas:

Sponsors	Fundraiser	Spirit Days
Bylaws	Membership	50th Year of School Celebration

This page is designed to help you use bylaws to build your board. Your board may look different.
See www.utahpta.org/basic-structure for more information.



THE PRINCIPAL AND THE TEACHER VP

Working with the Principal

The principal is a member of the PTA Executive Committee and, oftentimes, is the only constant in an ever-shifting leadership group. A supportive administrator encourages teachers and staff to participate in PTA activities and meetings, and cooperates with the PTA in the use of school facilities. Meetings may be held at the school with the permission of the principal or at any other location agreed upon by the membership.

A good working relationship between the principal and a healthy PTA can lead to a great learning environment for students and families. The PTA must work with all community members, especially those on the campus, in order to be successful. With our children and youth as our primary focus, to make every child's potential a reality, the decisions of the PTA center on the students' success. With this winning team mindset, you will see your community have an increase in family involvement, volunteers, and community engagement. The PTA president and the principal must communicate regularly and work together for the good of all concerned. Presidents need to remember that we are in the principal's school as a guest; however, the principal must also understand that we are governed by our bylaws, which may limit the PTA's response to some requests from the school.

The principal and the PTA president establish a positive partnership through:

- ♦ Communicating openly and honestly
- ♦ Understanding roles and responsibilities
- ♦ Establishing common goals and visions
- ♦ Working collaboratively for student achievement
- ♦ Respecting opinions and building trust
- ♦ Actively pursuing family and staff engagement
- ♦ Building positive community relationships

The Teacher Vice President

The Teacher Vice President provides an important connection between faculty and the PTA board and can give valuable feedback regarding PTA programs or procedures. Ask the Teacher VP to bring PTA information to the faculty and encourage them to join PTA. Try to schedule your board meetings so the Teacher VP can attend at least part of your meeting. Often the principal will recommend a teacher that has a prep time during the PTA board meeting time or will provide the teacher an aide so they can attend the meeting. Give them a time-certain on your agenda near the beginning of your meeting so they can leave early if they need to.



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, Spirit Nights/Family Nights, Spelling Bee, Battle of the Bands, Reflections, Fundraisers

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

- ♦ *Examples:* Guest 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.

- ♦ 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.
- ♦ The procedure book 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

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.



NEEDS ASSESSMENT INFORMATION

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

Groups to survey—parents, teachers, students, administrators, community

FOUR WAYS TO CONDUCT A NEEDS ASSESSMENT

1

INTERVIEW

Person-to-person — person-to-group — telephone

Advantages: Immediate response

Disadvantages: Difficult to administer and tabulate
Takes a lot of time

2

QUESTIONNAIRE

Fill out at a school activity — send home with child — door-to-door

Advantages: Easy to administer and tabulate

Disadvantages: If they are sent home, you can expect only about 10% return.
You still need to reach the members of the community who did not attend the school activity.

3

ONLINE SURVEY

Email out a survey in Google Forms or Survey Monkey

Advantages: Easiest to administer and tabulate

Disadvantages: May not get to all parents. People may not take the time to answer. Make questions short and simple with boxes to click instead of text boxes that require typing in answers.

4

SPEAKING OUT

Best used in small groups — divide larger groups into smaller groups

Advantages: Immediate response

Disadvantages: More personable—people have a “buy-in”
Difficult to tabulate “group”
Not all groups will be represented

After you have tabulated the results of your needs assessment:

- ♦ Meet with your board and review results.
- ♦ Set your goals and priorities together (include principal, who is a vice president of your PTA).
- ♦ Identify three to four programs or areas of concern to address during the year.
- ♦ Publish the results for your members and other groups surveyed.

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

YOU'RE ON YOUR WAY—HAVE A GREAT PTA YEAR!



SAMPLE NEEDS ASSESSMENT

Your input is very important to _____ PTA. PTA will be developing a program for next year and we hope you will help us. Please take a few minutes to fill out this brief survey. Every response will be considered. Return the completed form to the PTA. Thank you for helping us develop a program that will be fun and beneficial to our students, school, and the community.

Please check the events you or your family participated in this year:

- | | | |
|--|---|---|
| <input type="checkbox"/> Carnival | <input type="checkbox"/> Reading program | <input type="checkbox"/> Field trips |
| <input type="checkbox"/> Santa Shop | <input type="checkbox"/> Assemblies | <input type="checkbox"/> School pictures |
| <input type="checkbox"/> After-school enrichment | <input type="checkbox"/> Candy/gift wrap fundraiser | <input type="checkbox"/> Emergency kits |
| <input type="checkbox"/> Family fun nights | <input type="checkbox"/> School clothing | <input type="checkbox"/> Reflections |
| <input type="checkbox"/> Book fair | <input type="checkbox"/> Parenting workshops | <input type="checkbox"/> Screen free week |

Please check which events you feel we should include next year:

- | | | |
|--|---|---|
| <input type="checkbox"/> Carnival | <input type="checkbox"/> Reading program | <input type="checkbox"/> Field trips |
| <input type="checkbox"/> Santa Shop | <input type="checkbox"/> Assemblies | <input type="checkbox"/> School pictures |
| <input type="checkbox"/> After-school enrichment | <input type="checkbox"/> Candy/gift wrap fundraiser | <input type="checkbox"/> Emergency kits |
| <input type="checkbox"/> Family fun nights | <input type="checkbox"/> School clothing | <input type="checkbox"/> Reflections |
| <input type="checkbox"/> Book fair | <input type="checkbox"/> Parenting workshops | <input type="checkbox"/> Screen free week |

Is there another project, program or service activity that you feel we should consider? If so, please describe it:

If this project, program, or service activity is included in next year's program, are you willing to serve on the committee for it? Yes No

Name

Email

Again, thank you for your valuable input.



CALENDAR

Why Calendar?

1. Minimizes conflicts with other school, council, region, school district, and community activities.
2. Gives time to plan effectively. Coordinate with principal and school calendar.
3. Allows for ample spacing of major events.

What do you calendar?

LOCALS:

Meetings:

- ♦ Board (local)
- ♦ Executive Committee
- ♦ Council
- ♦ Region
- ♦ School board

Needs assessment

Membership drive

Programs/events for entire year

Fundraisers

General membership meetings

- a. Approval of audit or AFR report and budget by September 15
- b. Nominating Committee election - before December 31
- c. Report of nominees - February or before
- d. Elections - March or before
- e. Approval and/or changes in bylaws

Utah PTA Convention and Conferences

Annual Financial Reconciliation (AFR)

Reports due

Deadlines for awards

Reflections

Region and/or council events

- a. Reflections
- b. Training
- c. President's meetings
- d. Recognition programs
- e. Special conferences

National and/or state programs

Teacher appreciation

COUNCIL/REGION:

Executive Committee meetings

Board meetings

Needs assessment

Trainings

Meetings with local presidents

Reflections program

School board meetings

Pre-/Post-convention orientations/trainings

District appreciation

Field service/leadership

Special conferences

Reports due

Deadline for awards

Nominations

Elections

Annual Financial Reconciliation (AFR)

Where is this information available?

Utah PTA Website: UtahPTA.org

Council calendars

Region calendar

School district calendar

School calendar

Community calendar

National PTA website: PTA.org

National PTA kits



YEAR-LONG CALENDAR AND TIME LINE

*Use this calendar and time line to plan your upcoming year
Utah PTA website calendar is updated regularly: UtahPTA.org*

NOTES ABOUT CALENDAR:

- ♦ If you choose to incorporate activities into your schedule, adjust dates to your local school calendar as needed.
- ♦ Utah PTA dates are subject to change. Notification will be made online and to regions for distribution.

New Officer Transition Timeline (March through June)

March

- ♦ Election of officers.
- ♦ Transition period from your election until June 30 begins now.
- ♦ Convention workshop lists will be available on UtahPTA.org for you to start looking at training options for all your incoming board members. Check your budget to make sure you have adequate funds. Convention and trainings are legitimate expenses.

April

- ♦ Enter the incoming board information in MemberHub. Leaders listed in MemberHub will receive newsletters and communications from Utah PTA.
- ♦ Obtain a copy of your local bylaws from utahpta.org/bylaws/search. Check the expiration date to see if they are current or if they need to be renewed. Bylaws are renewed every three years. (**Note:** For your PTA/PTSA to be eligible to participate in Reflections and other PTA programs, apply for Utah PTA Awards, and receive sales tax refunds, your bylaws need to be current.)

- ♦ Fill board positions other than those which are filled by election. Local bylaws (Article VII) will tell you the duties of elected officers. Local bylaws (Article X) will help with commissioners and special committees.
- ♦ Meet with your new board.
- ♦ Prepare your local PTA/PTSA directory with your new incoming board officers and chairs. Directory should include position, name, phone number, and email address. Contact information is used for PTA business only.
- ♦ Attend pre-convention orientation meeting (if offered) and select classes that you and your board will be attending at the annual Utah PTA Leadership Convention. Convention for your new board should have been budgeted for by the outgoing board.
- ♦ Conduct needs assessment and set goals for the coming year.



May

- ♦ Meet with your principal and PTA incoming Executive Committee to start planning your calendar. Presidents are encouraged to develop a good working relationship with their principal. This is imperative to the success of your PTA. Remember, you preside over the PTA and the principal presides over the school. The president and principal work together for the welfare of students.
- ♦ Meet with the treasurer to begin the budgeting process. Do not assume office or sign any checks until July 1. The outgoing president is still president until June 30.
- ♦ Attend Utah PTA Leadership Convention. Take as many members of your board as possible. The better they are trained, the better your year will be. Travel together to convention, eat together, and get to know each other.
- ♦ Browse UtahPTA.org for new ideas and resources.
- ♦ Follow/join Utah PTA, region, and council social media. Utah PTA's Facebook groups are great places to ask questions and get ideas from other PTA leaders.

June

- ♦ In June, July, or August attend region training as scheduled.
- ♦ Meet individually with the members of your board to find out the vision they have for their position and year. Encourage them to have a committee under their leadership position.
- ♦ Pass outgoing board member procedure books to the incoming board members.
- ♦ Plan your membership goal.
- ♦ Remember PTAs raise money to exist—they don't exist to raise money. When you plan your budget, plan what you will be raising money for. Don't raise the money and then try to decide what to do with it.
- ♦ Transition your MemberHub account and other online PTA accounts.
- ♦ Request a Sales Tax Refund Request be filled out for July to June (entire school year) by the outgoing treasurer.
- ♦ Make sure an AFR (Annual Financial Reconciliation) is done before the incoming treasurer accepts the financial books.
- ♦ Work with your treasurer to change the names on your bank account signature cards, effective July 1.
- ♦ Prepare a thank you gift for your outgoing PTA president.
- ♦ June 30th – End of fiscal year.



Beginning of Fiscal Year - A Timeline for Presidents

July 1 - Congratulations! You are officially the local PTA president!

July

Dates to remember:

July 1 - Fiscal year begins/change over PTA checking account signers.

July 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Meet with your membership chair and plan your membership campaign. Remember: membership is not a fundraiser, it is joining your local PTA, Utah PTA, and National PTA. Article V, “Membership and Dues,” of your bylaws will tell you what your membership dues are: \$1.75 of your dues collected go to Utah PTA. \$2.25 go to National PTA. If in a council, your council dues amount is found in Article XI of your bylaws.
- ♦ Consider holding a leadership retreat to plan your year with all board members.
- ♦ Review previous year financial records with your treasurer and outgoing president. Ask them which IRS filing will be prepared. For the previous fiscal year, if gross receipts are normally more than \$50,000, “Form 990EZ” needs to be filed; otherwise, “Form 990N” is required. (If you receive anything from the IRS, do not ignore it. Call the Utah PTA treasurer for assistance.)
- ♦ If you use MemberHub, you will have digital membership cards available or obtain membership cards from your council or region. You will need to put your National PTA Unit ID number on each card. The ID number is found on the front page of your local bylaws. **Note:** *If you don't know what your total membership was last year, check with your council president, region director, or call the Utah PTA office.*
- ♦ If your school is year-round, kick off your school's membership campaign with your PTA board and staff in July. Have the budget approved and AFR report adopted at your first general membership meeting (Back-to-School Night). Be sure to publicize this event.
- ♦ Ask your principal if you can attend the first faculty meeting and encourage teachers and staff to join your PTA/PTSA. Express that the T in PTA stands for teachers. Provide teachers with information and dates for PTA activities.



August

Utah PTA Legislative Advocacy Committee (LAC) usually meets the fourth Wednesday of each month on Zoom. Open to all membership. Contact the Utah PTA Advocacy Vice President for more information.

Dates to Remember:

August 1 - Year end information submitted through MemberHub by treasurer:

- ♦ Year-End Financial Statement
- ♦ Annual Financial Reconciliation report (AFR)
- ♦ E-filed/Approved IRS Form 990
- ♦ Sales Tax Refund Request submitted on UtahPTA.org by treasurer

August 15 - Council review of Local Unit End-of-Year Documents:

- ♦ Council submit to region via MemberHub approval

August 25 - Membership money due to Utah PTA and council (if applicable.)

In General:

- ♦ Plan your local Reflections program.
- ♦ At your first general membership meeting: present the prior year financial statement and AFR report for adoption, have your budget approved, introduce your PTA board, introduce your theme for the year, let the parents know what PTA accomplished last year, and discuss your plans for this year including your membership campaign (possibly on Back-to-School Night). Some PTAs also elect Nominating Committee.
- ♦ Start your membership drive and encourage volunteers to sign up.
- ♦ Prepare beginning of the year paperwork. That includes budget and minutes of meeting where budget was approved, signed “Ethics/Conflict of Interest” and “Basic Fiscal Management Procedures” forms and “Proof of Insurance.”

September

Dates to Remember:

September 1 - Region review of Council/Local End-of-Year Documents::

- ♦ Region submit to Utah PTA via MemberHub approval

September 25 - Membership money due to Utah PTA and council if applicable (submit 50% of the previous year’s membership by this date to qualify for the Early Bird membership award).

In General:

- ♦ Kick off local Reflections program.
- ♦ Other activities (Google for more information).
 - Patriots Day (National Day of Service and Remembrance – 9/11)
 - Green Ribbon Month (health and safety)
 - Fruit and Veggies-More Matters
 - National Childhood Obesity Awareness
 - National Hispanic Heritage Month
 - Suicide Prevention Week
 - World Suicide Prevention Day
 - International Day of Peace (Global Day)
 - Family Health and Fitness Day



October

Dates to Remember:

October - Utah PTA Advocacy Conference.

October 1 - Beginning-of-Year Documents submitted through MemberHub:

- ♦ Updated PTA officer list
- ♦ Budget and minutes of meeting where budget was approved
- ♦ Signed “Ethics/Conflict of Interest” forms
- ♦ Signed “Basic Fiscal Management Procedures” form
- ♦ Proof of Insurance

October 1 - Budget must be approved by your general membership by this date (Article VII:5).

October 1 - “Utah PTA Resolutions Notifications of Intent” form due to Utah PTA. Form is found in the legislative section of this President Handbook.

October 15 - Council review of Local Unit Beginning-of-Year Documents

- ♦ Council submit to region via MemberHub approval

October - Military Family essay due to Utah PTA.

October 25 - Membership money due to Utah PTA and council if applicable (submit 75% of the previous year’s membership by the due date to qualify for the On Target membership award).

October - 2024-2025 National PTA Reflections Theme Search due - found on [UtahPTA.org](https://utahpta.org).

In General:

- ♦ Local Reflections program
- ♦ Other activities (Google for more information)
 - Bus Safety Month
 - Red Ribbon Week/Purple Ribbon Month (Drug and Violence Free)
 - Crime Prevention Month
 - National Book Month
 - National Bullying Prevention Month
 - Read for the Record
 - Mental Illness Awareness Week

- Walk to School Day
- National Book Month
- National Health Education Awareness Week
- National Teen Driver Safety Week
- LGBTQ History Month
- Mix It Up at Lunch Day
- Begin collecting information for Report #1, which is due November 1. (See Local PTA Reports at the end of this section for more information).

November

Dates to Remember:

November 1 - Local, council, and region PTA/PTSA Report #1 is due - submit on [UtahPTA.org](https://utahpta.org).

November 1 - Region review of Council/Local Beginning-of-Year Documents

- ♦ Region submit to Utah PTA via MemberHub approval

TBA Veteran’s Day Concert.

November 15 - Resolutions for consideration at Leadership Convention due to Utah PTA.

November 25 - Membership money due to Utah PTA and council if applicable (submit 100% +1 of the previous year’s membership by the due date to qualify for the Trailblazer membership award).

In General:

- ♦ Council Reflections program.
- ♦ Other activities (Google for more information).
 - National Military Month
 - Utah PTA Month of the Military Family
 - KUED Annual Reading Marathon Kickoff
 - National Family Literacy Day
 - National Family Week
 - Native American Heritage Month
- ♦ Prepare for December 1 deadline to qualify for Reflections and other Utah PTA programs.



In order to qualify, PTAs must have: current bylaws, all membership dues collected remitted to Utah PTA, and all other good standing requirements met (Article IV:1).

December

Dates to Remember:

December 1 - Remittance date for membership dues, bylaws renewals and good standing requirements to participate in Utah PTA programs.

December 25 - Membership money due to Utah PTA and council if applicable (submit 10% over the previous year's membership by the due date to qualify for the Beehive membership award).

In General:

- ♦ Region Reflections program.
- ♦ National Special Education Month.
- ♦ Check your bylaws for the date your Nominating Committee must be elected by. Most bylaws require Nominating Committee to be elected by December 31.

January

Legislative Action Committee (LAC) meets every week during the legislative session on Wednesdays on Zoom. The session starts the third or fourth week of January and continues for nine weeks through the first or second Thursday of March. Open to all PTA members. Contact the Utah PTA Advocacy Vice President for more information.

Dates to Remember:

January - Local PTA award applications due to council.

January 16 - Reflections due from regions to Utah PTA.

January 25 - Membership money due to Utah PTA and council if applicable.

January 17 - First day of legislative session.

Nominations for Utah PTA board member positions due – see website for more information.

In General:

- ♦ Local Battle of the Bands event.
- ♦ Other activities (Google for more information).
 - Parents Empowered Month
- ♦ Begin collecting information for Report #2 which is due February 1.
- ♦ Legislative session begins. You can follow all bills and PTA resolutions and positions that support the bills Utah PTA is following on the Utah PTA website under the Advocacy tab. The Bill Sheet is updated weekly during the legislative session.
- ♦ Local and councils are required, by their bylaws, to report nominations to their board 30 days before an election is held. Elections should be held before the end of March.



February

Dates to Remember:

Utah PTA **Leadership Convention registration** begins

February 1 - Local, council, and region Report #2 due - submit on UtahPTA.org.

February 1 - PTA Awards due from council to region.

February 1 - Arts Education Grant Fund and Art Supply Grant Applications due.

PTSA Student Days at the Capitol - check UtahPTA.org for dates.

PTA Day at the Capitol - check UtahPTA.org for date.

February 17 - PTA Founders Day.

February 25 - Membership money due to Utah PTA and council (if applicable).

February 28 - LEAP Award Online Application due to Utah PTA.

February 28 - Student Scholarship Online Applications due to Utah PTA.

In General:

- ♦ Take Your Family to School Week.
- ♦ Other activities (Google for more information).
 - National Dental Health Month
 - Black History Month
 - Teen Healthy Relationships Month
- ♦ Nominating Committee report of nominees should be made 30 days prior to election meeting.
- ♦ Election of local PTA officers must be held prior to March 31.
- ♦ Convention information distributed to all board members.

March

Dates to Remember:

March 1 - PTA Awards due from region to Utah PTA.

March 1 - Membership Awards due to Utah PTA.

March 1 - Local units Battle of Bands winners due to multi-region chair.

March 1 - Gold Star Award online application due to Utah PTA.

March 10 - Legislative session ends.

March 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Locals and councils hold elections as designated by your bylaws.
- ♦ Multi-region Battle of the Bands.
- ♦ Other activities (Google for more information).
 - National Day of Honor (Military)
 - White Ribbon Month (Respect)
- ♦ Transition period begins (election until June 30).



April

May

Dates to Remember:

Utah PTA Reflections Awards Evening (TBA).

April 1 - Battle of the Bands multi-region winners due to Utah PTA.

Utah PTA Battle of the Bands - check UtahPTA.org for dates.

April 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Pre-convention orientation meetings held
- ♦ Other activities (Google for more information).
 - Every Kid Healthy Week
 - National Child Abuse Prevention Month
 - Distracted Driving Awareness Month
 - National Volunteer Month
 - Month of the Military Child
 - National Arab-American Heritage Month
- ♦ Register incoming board for Utah PTA Leadership Convention.
- ♦ Enter incoming board information in MemberHub. Leaders listed in MemberHub will receive newsletters and communications from Utah PTA.
- ♦ Show incoming president how to download copy of bylaws from UtahPTA.org.

Dates to Remember:

May 1 - Resolutions for consideration at Fall Advocacy Conference due to Utah PTA. Include Utah PTA Resolutions Cover Sheet found in Legislative section of this President Handbook.

Annual Utah PTA Leadership Convention

Check UtahPTA.org for exact dates.

May 25 - Membership money due to Utah PTA and council (if applicable).

In General:

- ♦ Other activities (Google for more information).
 - National Teacher Appreciation Week
 - National Mental Health Month
 - Screen Free Week
 - National Military Appreciation Month
 - Armed Forces Week
 - Armed Forces Day
 - Asian-Pacific American Heritage Month
 - National Foster Care Month
- ♦ Begin wrapping up business for the end of the year.
- ♦ Help the incoming president with any questions.
- ♦ Have a transition luncheon, dinner, or meeting where outgoing leaders pass the procedure books and PTA resource materials to incoming PTA board members.



June

Dates to Remember:

June 1 - Local, council, and region report #3 due.

June 25 - Membership money due to Utah PTA and council (if applicable).

June 30 - Utah PTA fiscal year ends; books must be closed. Begin preparation of End-of-Year Documents: Year-End Financial Statement, Annual Financial Reconciliation report (AFR), Approved IRS Form 990, Sales Tax Refund Request.

In General:

- ♦ Board transitions
- ♦ Books closed pending year end financial reconciliation
- ♦ Other activities (Google for more information).
 - National Flag Week
- ♦ Outgoing president and treasurer review previous year budget with incoming PTA president and treasurer. Also discuss preparation by outgoing officers of IRS “Form 990EZ” or “990N,” whichever is required. For previous fiscal year, if gross receipts are normally more than \$50,000, “Form 990EZ” needs to be filed; otherwise, “Form 990N” is required. The 990 cannot be filed until after July 1.
- ♦ Have treasurer fill out “Sales Tax Refund Request” form on UtahPTA.org by August 1.
- ♦ Have treasurer work with incoming PTA president to change bank account signatures effective by July 1.
- ♦ Have Executive Committee appoint an auditor or elect an AFR Committee and have the treasurer prepare the records for the AFR.
- ♦ No checks can be written after June 30 by outgoing treasurer.

BEGINNING OF THE FISCAL YEAR

July

Dates to Remember:

July 1 - The incoming PTA president and officers officially take office.

The outgoing president and treasurer are still responsible to complete End of Year Financial Reports.

In General:

- ♦ Prepare all End-of-Year Documents: Year-End Financial Statement, Annual Financial Reconciliation report (AFR), E-filed/ Approved IRS Form 990, and Sales Tax Refund Request. When the AFR is complete, books can be turned over to new treasurer.
- ♦ Incoming treasurer should coordinate signatures to be changed at the bank.

August

August 1 - Deadline for AFR to be completed and report to be given to the incoming president and treasurer as well as all End-of-Year Documents submitted on MemberHub.



MEETINGS

You Chair	Executive Committee Meetings Board Meetings General Membership Meetings
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You Attend	Council meetings Region meetings - if your region has councils, this may be by invitation School board meetings Utah PTA Leadership Convention Advocacy Conference PTA Day at the Capitol
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Note: Contact your local school district office and ask to be put on the mailing list to receive board meeting agendas.

PTA MEETINGS DEFINED

General Membership Meetings (see Bylaws Article IX for months for meetings)

At least three general membership meetings must be held each year and a quorum must be present. All PTA members must be invited to attend. The budget is adopted at the first General Membership Meeting of the year. The Nominating Committee is elected at a General Membership Meeting before December 31. The Nominating Committee reports the slate of nominees and the election of officers is held at a General Membership Meeting in the spring. The last General Membership Meeting of the year is considered the annual meeting and also may have reports of officers, commissions, and committees, if desired. Minutes are taken and a financial report is given at each meeting. Some PTAs have a program such as a speaker or an activity after the business is completed or combine the General Membership Meeting with a scheduled school event such as Back to School Night or a concert.

Executive Committee Meetings

The Executive Committee members are the elected officers and are defined in the Bylaws in Article VI, Section 4a. The Executive Committee meets during times when the board is not meeting such as summer and between board meetings. The Executive Committee is responsible for (Article VIII) planning the dates of the General Membership Meetings, determining the order of the vice presidents at the first Executive Committee meeting, participating in budgeting with the treasurer, filling vacancies in offices besides president-elect, declaring an office or position vacant if someone misses three consecutive meetings without excuse, providing one Executive Committee member for the nominating committee, receiving the initial report of the nominating committee, appointing an auditor or AFR Committee, and receiving the report of the Annual Financial Reconciliation. Minutes are taken, a financial report is given, and business is conducted as needed.



Board Meetings

- ♦ The Board of Directors consists of the Executive Committee and the commissioners. Regular (usually monthly) board meetings are held throughout the year. The president invites officers, commissioners, committees, and event and program chairs to report at each meeting. The president should look ahead at the calendar and invite event chairs to discuss their plans before their event or program and report to the board after. Members of this PTA are able to attend any board meeting if they desire. A financial report should be given and minutes should be taken.

Council Meetings (or region meetings if you don't have councils)

- ♦ A meeting of local PTA presidents to receive information from Utah PTA, receive training, and exchange ideas with other leaders. Representation from your PTA is important. If you cannot attend a council or region meeting, please send another officer to represent your local PTA. This is your connection with Utah PTA. Your president-elect and principal also attend.

Utah PTA Leadership Convention

- ♦ Convention is held annually in May to train, inform, receive resources, and network. Classes are held for each board position. The vendor hall provides opportunities to network with suppliers, fundraising businesses, and community resources.
- ♦ A Business and Resolutions Meeting is held where resolutions and bylaws amendments come forward to be voted on by the delegates. Local units may submit new resolutions to be approved by the general membership. Active resolutions can be found at UtahPTA.org/Resolutions. Information on how to submit a resolution can be found in the legislative section of this handbook.

Advocacy Conference

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

PTA Day at the Capitol

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



RUNNING MEETINGS

- ♦ *Schedule meetings at convenient times.* Poll members to find times that work best for the majority. Consider some evening and some day meeting times to accommodate different family lifestyles.
- ♦ *Have a clear purpose for each meeting.* Members want to feel that something significant was accomplished and their time was valued. Create an agenda for this purpose.
- ♦ *Facilitate effectively.* As facilitator, your job is to start and end the meeting on time and keep conversation focused on the meeting's purpose. Be sure everyone feels welcomed and invited to participate. Use parliamentary procedure (Robert's Rules of Order) to make sure everyone gets heard, no one dominates the conversation, and ideas are fully explored before the majority rules through voting.
- ♦ *Engage participants.* Incorporate activities that get people involved and generate discussion, and use visual aids to grab attention.
- ♦ *Ensure a quorum.* A quorum is a minimum number of members who must be present to conduct business and vote at a meeting. This number is found in your PTA's Bylaws. If a quorum is not met, you may hold a meeting but a vote cannot be taken.
- ♦ *Take minutes.* According to the IRS, minutes become part of the organization's permanent file.
- ♦ *Plan for social time.* Consider adding social time before or after the meeting so that those with busy schedules feel their time is well-used and those who want to socialize have time to network.

MATERIALS

Materials to have on hand for reference at meetings:

1. A copy of your bylaws, which you can download at utahpta.org/bylaws/search
2. A copy of your standing rules
3. A copy of your EIN and PTA Unit ID number, which are on the first page of your bylaws
4. A copy of your school/district policies
5. Minutes of previous meetings
6. Treasurer's reports
7. A copy of the approved budget
8. Directories
9. Region and council information
10. Roster of membership
11. Calendars (school district, region, council, local school)
12. Utah PTA handbooks



AGENDAS

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

Include:

1. Call to order
2. Opening ceremonies (thought, leadership thought, Pledge of Allegiance, etc.)
3. Approval of agenda
4. Reading and approval of minutes
5. Reports of officers, committees, including a treasurer report
6. Special business (financial reports, nominations, elections)
7. Unfinished business
8. New business
9. Calendar items
10. Adjournment

MINUTES

Minutes are a record of all business transacted at each meeting of the association, the Executive Committee, and board, and are normally written by the secretary.

Include:

1. Name of the association and the meeting
2. Location of the meeting
3. Date and time
4. Name of person conducting and those taking part
5. A roll—present and excused
6. All action taken—“adopted” or “rejected”
7. A brief account of reports, including figures in the treasurer’s report
8. Minutes should not include opinion, lengthy descriptions of discussions, or detailed quotes from speakers
9. Time of adjournment
10. Place at the end for the signature of the secretary

What do I do with the minutes?

- ♦ Distribute a copy of the minutes
- ♦ Read and approve all minutes
- ♦ Keep a copy in a permanent record

Why do I keep the minutes?

- ♦ Possible IRS audit
- ♦ To document programs and procedures
- ♦ To document bylaws and budgets were followed

How long do I keep minutes?

- ♦ These are permanent historical records

Where do I store the minutes?

- ♦ Most PTAs have a place at the school for permanent historical records



INFORMATION FOR BOARD AND EXECUTIVE COMMITTEE MEMBERS

Information sheet for your board: Every board member and committee chair should know the basic information of your PTA. Make an information sheet for each member of your board that includes your PTA Unit ID number, your EIN, your bylaws expiration date (these three items can be found on the front page of your bylaws), your region number, region director name and contact information, your council name, council president name and contact information (if you are in a council), and how to find your PTA social media pages or PTA website.

Other information for your board: Provide board members with a board directory, a list of meeting dates, and a calendar of PTA and school events.

Information sheet for your Executive Committee: For transparency, your Executive Committee should know the account and login information for your financial and online accounts. Make an information sheet for your Executive Committee that includes your bank account information including account name and account number, the names of the check signers, bank website login information (read only), and login information for other websites with shared login information such as PayPal, Square or Stripe, the PTA Facebook page or group, and other PTA social media sites. You might consider making them admins for your social media pages or groups. Account passwords should be changed yearly.

WHAT ARE STANDING RULES?

Standing rules outline the procedures of the organization that are not included in the bylaws and must not restate or conflict with the bylaws. Standing rules are unique to each PTA. Not every PTA has standing rules, but they can help your PTA have continuity in programs and procedures from year to year.

For instance, bylaws state when the general meetings of the association are held. Standing rules tell where and what time these meetings are held. Bylaws give the primary responsibilities of officers. Standing rules give the specifics. If the PTA has supplies and/or equipment, the standing rules should state who is responsible for them and where they would be kept. Standing rules could list the committees of the PTA, such as the Reflections Committee, the Teacher Appreciation Committee, the Hospitality Committee, and the Red Ribbon Week Committee. It could also list the specific responsibilities and timelines of each committee.

In short, bylaws are hard and fast rules where only certain parts may be amended with 14 days prior written notice to the membership.

Standing rules are the details of PTA work that may be changed from administration to administration or more often if needed. A new standing rule is adopted with a majority vote. Changes require a two-thirds majority vote without notice and a majority vote with 30 days notice. It's a good idea to review and adopt the standing rules each year.

For more information on standing rules, please see the Bylaws section of this handbook or UtahPTA.org/Guidelines-Standing-Rules.



PARLIAMENTARY PROCEDURE

Parliamentary procedure is an orderly set of rules for conducting meetings of organized groups for the purpose of accomplishing their goals fairly. Use of parliamentary procedure ensures:

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

Terminology

Bylaws—Specific rules adopted by a PTA that must be followed. Must be reviewed every three years for necessary amendments or renewal. Bylaws renewal information is available in the Bylaws section of this handbook and on utahpta.org/bylaws. Your bylaws can be downloaded on utahpta.org/bylaws/search.

Chair—The presiding officer.

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

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

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

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

Steps to Process a Main Motion

Member rises and addresses the chair or raises hand:

"Madam President."

Chair recognizes the member:

"The chair recognizes—"

Member makes a motion:

"I move that—"



Another member seconds the motion:

"Second" or "I second the motion."

The chair states the motion and opens debate:

"It is moved and seconded that ... Is there any discussion?"

Chair recognizes members wishing to speak.

After debate concludes, chair puts the question to a vote:

"The question is on the motion (the chair repeats the motion). Those in favor of the motion say 'aye.' Those opposed say 'no.'"

Chair announces the result of the vote and what action will be taken:

"The Ayes have it, and the motion is adopted. We will (states action to be taken)." or "the Nos have it, and the motion fails."

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

Voting

General Consent:

"If there is no objection, we will... (pause). Since there is no objection, we will—"

Voice vote:

"All in favor say 'aye.' Those opposed, say 'no.'"

"The ayes/nos have it, and the motion passes/fails."

Rising vote (not counted):

"Those in favor will rise. Thank you, be seated. Those opposed will rise. Thank you, be seated."

"The ayes/nos have it, and the motion passes/fails."

Methods of Amending a Motion

By striking out:

"I move to amend the motion by striking out the word 'Denver.'"

By inserting:

"I move to amend the motion by inserting the word 'Seattle' after the word 'Portland.'"

By striking out and inserting:

"I move to amend the motion by striking out the phrase '\$35' and inserting the phrase '\$50.'"



A SIMPLE TABLE OF MOST FREQUENTLY USED MOTIONS

Motion	Second?	Vote Required	Debatable?	Amendable?	Reconsiderable?
Adjourn Meeting	Yes	Majority	No	No	No
Amend a Pending Motion	Yes	Majority	Yes, if motion to be amended is debatable	Yes	Yes
Call the Previous Question	Yes	2/3	No	No	Yes
Close Nominations	Yes	2/3	No	Yes	No
Division of Assembly	No	Any Member	No	No	No
Limit or Extend Debate	Yes	2/3	No	Yes	Yes
Main Motion	Yes	Majority	Yes	Yes	Yes
Point of Order	No	Ruled on by chair	No	No	No
Postpone to a Definite Time	Yes	Majority	Yes	Yes	Yes
Question of Privilege	No	Majority	No	No	Yes
Recess	Yes	Majority	No	Yes	No
Reconsider	Yes	Majority	Yes, if motion to which it applied is debatable	No	No
Refer (commit)	Yes	Majority	Yes	Yes	No
Rescind	Yes	Majority with notice, 2/3 without notice	Yes	Yes	Yes
Suspension of Rules	Yes	2/3	No	No	No
Table a Motion	Yes	Majority	No	No	No
Remove Motion From Table	Yes	Majority	No	No	No
Withdrawal of Motion	No	Majority	No	No	No



VIRTUAL MEETINGS AND VOTING

PTAs can hold virtual meetings if needed. Virtual meetings are similar to an in-person meeting with a few more things to think about.

Finding a Platform

There are several ways to hold a virtual meeting. Some of the most popular platforms (Zoom, Google Meet, Microsoft Teams) are free for short meetings (40 - 60 minutes). Other platforms, such as Facebook Messenger, are free for unlimited time but have restrictions, such as you all need to be Facebook friends. More and more free options are available, so search if you need to find other options. To hold a meeting longer than the free time limit, you could announce at the beginning that when the free meeting time ends, they should re-enter the meeting with the same link to continue the meeting.

Preparing Before the Meeting

Virtual meetings take a little extra preparation. Email out the agenda, the minutes, and any handouts ahead of time along with the meeting link. Ask someone to be a co-host to help you let people in from the waiting room, follow the chat, and mute people if needed. You may need to prepare slides with the information you need to share. Be sure to use your PTA logo on your slides. Decide how you are going to vote and make some polls or surveys ahead of time if needed. Decide how people will indicate they want to speak (ask verbally, raise their hand, etc). Make sure you know how to use the controls. If this is your first virtual meeting, run a practice session to make sure you know how to do everything.

Meeting Day

Get online in the meeting a few minutes early. Make sure you don't have background noise. Make sure the lighting is good and you don't have a lighted window right behind you. Start on time. Announce how voting will work and how someone can indicate they want to speak. Do not let a few bumps throw you. Keep on smiling and keep on going. End the meeting on a high note: recap, tell members what will happen as a result of the meeting, and thank everyone who attended. Consider adding a short post-meeting networking session for those who want to stay and socialize. Pick a topic and ask people to share ideas.

Voting

Most routine voting, such as approving the agenda and minutes, can be done with a voice vote or by raising hands. Some platforms have a way to indicate yes or no or a thumbs up in their reactions or participant controls. Polling, or a survey sent to attendees, might be needed for a vote that might be controversial or for a vote with more than one option. Polling isn't available in the free version of some meeting platforms (such as Zoom). Polls can be set up ahead of time to help the meeting go smoother. A survey, such as in Google Forms or Survey Monkey, could be emailed out to the attendees. The chair announces a vote will be taken, launches the poll or emails out the survey, waits a specified amount of time or until everyone present has voted, then displays or announces the results of the vote. The secretary should record the result of the vote in the minutes. As a reminder, proxy voting, which is allowing someone else to vote in place of someone who can't attend a meeting, is prohibited in the bylaws.



WAYS TO RECRUIT AND RETAIN VOLUNTEERS

How to Get Volunteers

- ♦ Send an invitation out to all parents. Ask the principal to send out a beginning or end of year appeal for volunteers. Include a volunteer appeal in registration materials. Let parents know the Mission of PTA and how we are trying to help every child. People can't volunteer if they don't know you need them.
- ♦ Personally ask people. Ask your own friends. Have each board member ask someone they know. Have a volunteer opening social in order to meet parents and recruit volunteers.
- ♦ Make a poster with volunteer needs and post it by or in the office. Let parents know your needs and allow them to sign up.
- ♦ Keep your request for more volunteers positive. Instead of pleading for volunteers and indicating that no one will help in the PTA, use positive testimonials from volunteers to show that volunteering is good for the school.
- ♦ Don't turn a volunteer away – use them somehow. Ask parents what they can or would like to do. If you have too many volunteers, give them parts of your job. Don't be afraid to start a new program to utilize a new volunteer.
- ♦ Look outside your school. Reach out to local businesses. Larger corporations often offer incentives to employees who volunteer (e.g. Kohls, Deloitte, Salesforce). Ask high school students. Honor society members often need volunteer hours.

Retaining Volunteers

- ♦ Train your volunteers so they have everything they need to be successful. Clearly define the roles and expectations to avoid confusion. Be organized. Give them more information so they will understand the job that needs to be done. Orient them to link volunteering to the broader Mission of PTA. Give new volunteers a volunteer buddy so they can learn.
- ♦ Provide meaningful tasks that contribute to the overall success of the project. Make sure each position accomplishes diverse tasks. Don't assign tasks that waste volunteers' time.
- ♦ Give clear directions and be available to answer questions. Seriously consider a volunteer's advice and recommendations.
- ♦ Help PTA volunteers acquire new skills and relate them to their personal or professional life. Show volunteers how they can enhance their resumes and personal gifts. Provide opportunities for leadership advancement.
- ♦ Show recognition and appreciate every volunteer, regardless of his or her task. Make it specific and meaningful to each volunteer.
- ♦ Have each committee and board position keep a procedure book so future volunteers will have a record of what was done in the past and guidance for doing their jobs.

We want to keep our volunteers, not spend time getting them back!



WHY COUNT VOLUNTEER HOURS?

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

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

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

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

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

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

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

Record All Volunteer Hours

- ♦ Classroom volunteers. Often hours are recorded on a computer and the school secretary can be asked for a compilation of hours. Also include after school program volunteer hours.
- ♦ Planning hours/meetings.
- ♦ Hours spent carrying out duties.
- ♦ Hours spent at home on PTA-related matters by all board members.
- ♦ Baby-sitting hours for PTA.
- ♦ Time spent driving to and from PTA functions.
- ♦ Hours spent lobbying at the legislature or the school district.
- ♦ Record your PTA's hours on Local Unit Reports. Information on Local Reports #1, 2, and 3 are at the end of this section.



PROCEDURE BOOK

Don't Re-invent the Wheel—Creating and Keeping a Procedure Book in PTA

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

Include the following:

- ♦ A copy of the local bylaws which can be downloaded on utahpta.org/bylaws/search.
- ♦ Standing rules. Not all PTAs have these; they contain job descriptions and more detailed information about conducting the business and directing the activities of your PTA.
- ♦ The annual budget, especially the budget for your activity or project.
- ♦ PTA calendar for the year.
- ♦ Materials from workshops and convention.
- ♦ Job descriptions that are updated regularly for easy reference. Refer to your standing rules, or UtahPTA.org.
- ♦ Agendas, minutes, financial reports, and all other reports.
- ♦ A list of the officers, chairs, and committee members' addresses, telephone numbers, and email addresses.
- ♦ A list of resource people and organizations. Include addresses, phone numbers, and email addresses.
- ♦ Special information relating to officers or chairs and current work plans.
- ♦ Previous program correspondence and files for several years so that officers can look back on their predecessors' work as needed.
- ♦ All fliers, handouts, newsletter articles, announcements and other publicity, and media tools.
- ♦ Copies of all receipts from the purchase of supplies or food for your particular project.
- ♦ A comprehensive list of supplies needed for the project and their location.
- ♦ A time line for the project, when to reserve things, order things, pick up things, how often to hold meetings, etc.
- ♦ A digital file or folder containing all of the above information that was created specifically for this project.
- ♦ Very important—an evaluation of the project. What worked and what didn't. What you wish you had done differently. Include the names of key people who helped you most or provided important and helpful information. It is always good to re-convene the committee to discuss this as a whole to get different viewpoints.

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



PROBLEM SOLVING POINTERS

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

CONFLICT MANAGEMENT

Conflict in PTA usually revolves around three areas:

- ♦ Individual conflicts
- ♦ Problems relating to PTA activities
- ♦ Group/individuals in opposition to PTA policies or positions

Some conflicts may be avoided when you are:

- ♦ Knowledgeable
- ♦ Familiar with bylaws
- ♦ Following the policies of PTA
- ♦ Informed about the issues
- ♦ Sensitive to the rights of members
- ♦ Able to avoid personality conflicts

Remember to:

**Listen to Understand, Agree to Disagree,
and Be Tolerant of Intolerance**



DEALING WITH DIFFICULT PEOPLE

Difficult people can be found in any PTA group. They come in all shapes and sizes but they can be identified by the strategies they use to sabotage the group's efforts. A calm and self-controlled leader who has practiced group management techniques can provide a climate that allows all members to effectively contribute.

Here are a few types of difficult people and suggested strategies to work with them:

The Blocker: Says NO to everything and everyone. Attempts to bring back an issue or task after it has been rejected or bypassed.

Suggested questions/follow up comments: Why do you feel this way? Give us your background on that opinion. Where did you get that information?

The Attacker: Reacts negatively to people and projects. Expresses disapproval of the values, acts, and feelings of others. Attempts to keep others from being credited with any contributions.

Suggested questions/follow up comments: Let's look at both sides. Where did you get your data for that opinion? Could we discuss the idea and leave personalities out?

The Clown: Refuses to take anything seriously; makes jokes about everything. Displays a lack of involvement in the groups' efforts by being cynical, nonchalant, or playfully disruptive.

Suggested questions/follow up comments: How does that relate to the subject? We needed a good laugh; now, let's get back to the topic. Would that help us deal with this issue?

The Recognition Seeker: Wants to be heard and feel important. Boasts and demands to be in charge of committees or assignments.

Suggested questions/follow up comments: Could we hear more? Give us specific information, please. Could you look into that and give us more information at the next meeting?

The Avoider: Leaves or withdraws from the meeting, ignores discussion, or is quiet.

Suggested questions/follow up comments: We need a decision. We really want your input on this issue. What can you personally do to contribute?

The Special Interest Pleader: Emphasizes my child or those poor children. Diverts attention from the goals and focus of the group effort.

Suggested questions/follow up comments: How does this work for the group? If we did this, how would it affect our group's goals? Is this our only choice?

The Dominator: Asserts power or superiority to manipulate the group. Insists on my way; does all the talking. Bullies and bosses others in an autocratic manner.

Suggested questions/follow up comments: Are there other suggestions? Would this work in all cases? While we're on this point, let's hear from someone else.



CHAIRING A TOUGH MEETING

At times, a PTA is faced with issues that ignite strong feelings from its members and community. Conducting a meeting involving these issues can be difficult for the local PTA president and board.

Before the Meeting

- ♦ Confer with appropriate officers and/or other board members to pre-plan the meeting to allow maximum participation from all points of view. Ask your council president or region director for help, if needed.
- ♦ Check PTA sources for existing positions on issues to be discussed. Check UtahPTA.org for resolutions or positions statements.
- ♦ Prepare a thorough and thoughtful agenda for the meeting.
- ♦ Carefully study Robert's Rules of Order Newly Revised on meeting procedures, motions, etc.

During the Meeting

- ♦ Have a copy of your local PTA Bylaws, your standing rules, your President Handbook, and Robert's Rules of Order Newly Revised on hand.
- ♦ Establish ground rules and follow them. Conduct the meeting as formally as possible.
- ♦ If the group is willing, special rules for this meeting can be agreed upon at the outset, such as the number of times a person may speak to any one item, time limits for all speakers, etc.
- ♦ As the chair, the president has the privilege to overlook the recognition of a speaker who may be dominating the floor in favor of others who may not have spoken.
- ♦ If the group continues to disagree in such a way that further study is warranted, the chair should solicit a motion to organize a committee. Those who have expressed strong feelings on the issue should be given the opportunity to serve on the committee.
- ♦ Appear calm, even if you are distressed.
- ♦ Be polite but forceful.
- ♦ Whatever happens, keep your perspective by maintaining neutrality as a chair and your sense of humor.



SCHOOL COMMUNITY COUNCILS

Why Are Schools Required to Have Community Councils?

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

Reason for SCC Establishment (53G-7-1202)

- ♦ Involve parents of student in decision making at the school level
- ♦ Improve the education of students
- ♦ Prudently expending School LAND Trust Program money for the improvement of students' education through collaboration among parents, school employees, and the local school board
- ♦ Increasing public awareness of
 - School trust lands and related land policies
 - Management of the State School Fund (established in Utah Constitution Article X, Section V)
 - Educational excellence

Duties of the Council

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

- ♦ Review school-wide data assessment annually
- ♦ Assist in development and implementation of school plans:
 - 1) Teacher and Student Success Plan (TSSP) (School improvement) (53G-7-1305)
 - 2) Trust LAND (Learning and Nurturing Development) Plan (expend these dollars to support a goal in TSSP) (53G-7-1206)
 - 3) School Safety Plan (53G-7-1202(v)(A)(B))
 - 4) Safe Technology and Digital Citizenship Plan (53G-7-1202(ii)(D); (iii); (iv))
 - Provide for education and awareness on safe technology utilization and digital citizenship that empowers:
 - A student to make smart media and online choices
 - A parent to know how to discuss safe technology use with the parent's child
 - 5) Positive Behavior Plan (53G-7-1202) (53G-10-407) to address student use of tobacco, alcohol, electronic cigarettes, etc.
- ♦ Advise and make recommendations to school and district administrators and to the school board when appropriate.
- ♦ Create subcommittees and task forces as needed.
- ♦ Ensure parents can access information regarding the council and its roles by providing required information on school website.



School Community Council Guidelines

Each school community council consists of school employees, including the principal and parents or guardians of students attending the school.

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

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

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

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

One week prior to each council meeting, the following information must be posted on the school website:

- ♦ Notice of the upcoming meeting, including the date, time, and place
- ♦ The agenda for the meeting
- ♦ Draft minutes of the previous meeting
- ♦ An agenda for the meeting must also be posted at the main entrance of the school at least 24 hours before the meeting

Required reports are as follows:

- ♦ The council's proposed meeting schedule must be provided to parents
- ♦ A summary of the implementation of the previous year's School LAND Trust Program
- ♦ A telephone number or email address where each council member can be reached directly

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



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

Information to consider at the first school community council meeting

- ♦ Elect officers.
- ♦ Review school data, assessments, and demographic information.
- ♦ Review current school plans.
- ♦ Review budgets to accomplish current plans.
- ♦ Review the role of the school community council in implementation of plans they have oversight of or involvement with.
- ♦ Review district due dates of each plan and what the council must do for plans to be completed, voted upon, and submitted in a timely manner.
- ♦ Calendar tasks and meetings to complete the work.
- ♦ Discuss creating subcommittees; appoint members and determine their roles, as needed.
- ♦ Assign tasks to council and/or subcommittees, as needed. For more information on school community councils, please visit [Schools.Utah.gov/SchoolAndTrust](https://schools.utah.gov/SchoolAndTrust) to find invaluable resources. It includes information about elections and the responsibilities of council members along with timelines, checklists, and other training materials.



PTA AND SCHOOL COMMUNITY COUNCILS WORKING TOGETHER

Trust Lands and School Community Councils

- ♦ Take the opportunity to learn more about trust lands at the Utah PTA Leadership Convention, PTA Day at the Capitol, and Utah PTA Advocacy Conference.
- ♦ Be sure your PTA has representation on your school community council. If a member of your PTA board is not currently an elected member of the community council, your board can still have someone attend the meetings to provide input and participate on any sub-committees.
- ♦ Join the “Utah School Community Councils” group on Facebook in order to receive information about trust lands and school community councils. You can also ask questions and share ideas with other school community council and PTA members in this group.
- ♦ Have your safety commissioner work with your school community council to ensure students and parents are provided with education on safe technology utilization and digital citizenship. PTA has great resources which can help the school with internet safety and digital citizenship.
- ♦ Have your Legislative Vice President and other board members join the Utah PTA Take Action Network by going to UtahPTA.org/Take-Action-Network. They will then receive important updates about trust lands and other legislative issues.
- ♦ Work with your principal and community council chair to prepare an article for the PTA newsletter discussing the School LAND Trust program and how your school is using their School LAND Trust funds.
- ♦ Write letters to your state legislators and other elected officials informing them of how the trust lands funds are being used in your school. Let them know of your support for the program.



INSTALLATION OF PTA OFFICERS

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

If desired, create a handout with the Utah PTA Mission statement as a bookmark, in a frame, or on a card/magnet for each of the officers being installed. You may print copies of the following bookmarks or find a color PDF at UtahPTA.org/Installation-Officers.

Utah PTA Mission:

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

Vision of Utah PTA:

- ♦ 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.

The installing officers:

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

Example installation ceremony:

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

Example for local:

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

Example for council/region:

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

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

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My challenge to you is to keep children the focus of your PTA service. Remember to enhance parent involvement - in your homes, schools, and communities. Everyone must be willing to work for each child to reach his/her full potential.

May you enter upon your office with the steadfast purpose of serving as only you can serve. Do you accept the challenge and charge? Please signify by saying, "I do." And do you members of PTA accept the challenge to work for every child, with one voice? Please signify by saying, "I do."

It is my pleasure to declare you duly installed officers of the _____ PTA/PTSA (recite years to be served).

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

LEADERSHIP POINTS TO PONDER

"Treat people as if they were what they ought to be and you help them to become what they are capable of being." -*Johann Wolfgang von Goethe, German writer and polymath*

"Keep your dreams alive. Understand to achieve anything requires faith and belief in yourself, vision, hard work, determination, and dedication. Remember, all things are possible to those who believe." -*Gail Devers, three-time Olympic Champion in track and field*

"People will forget what you said, people will forget what you did, but people will never forget how you made them FEEL." -*Maya Angelou, African-American poet, memoirist, actress, director, and civil rights activist*

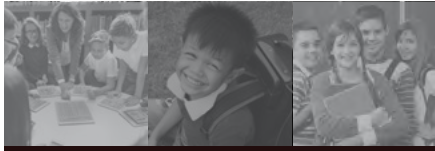
"Each of us must come to care about everyone else's children. We must recognize that the welfare of our children is intimately linked to the welfare of all other people's children. After all, when one of our children needs life-saving surgery, someone else's child will perform it. If one of our children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

"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has." -*Margaret Mead, anthropologist*

"A good leader takes a little more than his share of the blame, a little less than his share of the credit." -*Arnold H. Glasgow, businessman*

"A person who feels appreciated will always do more than what is expected." -*Anonymous*





**Utah
PTA[®]**

everychild. one voice.

MISSION

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



Utah PTA Mission bookmark
available on UtahPTA.org

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
- ♦ Click on “My Account” under the “Profile” icon
- ♦ Make sure you are added as an officer for your unit under PTA units
- ♦ Click “Reports” for your unit
- ♦ Instructions to file reports can be found at UtahPTA.org/Reports.

Information About Reports

You may edit your report up until June 30.

Specific Information:

- ♦ The number of members is year-to-date.
- ♦ Volunteer hours are for the report period only, **not** year-to-date.

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

List of Questions on Report #1

MEMBERSHIP AND HOURS

Total volunteer hours from July 1 through October 31 for all PTA volunteers.

Number of paid memberships.

How many people are currently on your PTA board including officers, commissioners and appointees?

Have all your board members paid their PTA membership dues for your specific PTA?

BUDGET AND FINANCES

Has your PTA budget been approved according to your bylaws?

Are your bylaws current?

Do you have PTA funds budgeted for convention/leadership training?

Do you have PTA funds budgeted for insurance?

Have all your membership monies been remitted to Utah PTA, including national, state, and council (if applicable)?

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MEETINGS AND MINUTES

Have you started your local PTA procedure book for this year?

Number of local PTA meetings held from July 1 through October 31.

Have you scheduled three general membership meetings for this school year?

Did you use a needs assessment to set goals for your PTA?

TRAINING

What kind of leadership training does your PTA need?

Have you submitted the following to your council president or region director?

- ♦ Board list
- ♦ Year-end Financial Statement
- ♦ Annual Financial Reconciliation Report
- ♦ IRS “Form 990” (“990,” “990N,” or “990EZ”)
- ♦ Approved PTA budget
- ♦ General membership meeting minutes where budget was approved
- ♦ Signed Basic Fiscal Management Procedures
- ♦ Signed Ethics/Conflict of Interest Policy

List of Questions on Report #2

Total volunteer hours from November 1 through January 31 for all PTA volunteers.

Total number of paid memberships.

Have all your membership monies been remitted to Utah PTA, including national, state, and council (if applicable)?

Has your PTA elected a nominating committee?

Is your PTA reaching out and including all neighborhoods, areas, and groups in your school community?

TRAINING

Have you attended council or region meetings to receive training this year?

What kind of leadership training does your PTA need?

NEEDS ASSESSMENT AND GOALS

What are your PTA’s top priorities based off your needs assessment? What programs are you doing to accomplish these goals?

How can your council president be of service to your PTA?

Have you made arrangements to send out a needs assessment (parent survey) for the upcoming school year?



List of Questions on Report #3

Submit the name and email for next years PTA president?

Name _____ Email _____

Please submit names of PTA officers into Memberhub.

Number of paid membership for this year _____?

Total volunteer hours from February 1 through June 30 for all PTA volunteers. Include estimated hours for remainder of June.

Have you conducted a needs assessment for the upcoming school year?

Have you attended council or region meetings to receive training this year?

Which incoming PTA positions went to the Utah PTA Leadership Convention training in May?

- ♦ President
- ♦ President-Elect
- ♦ Treasurer
- ♦ Secretary
- ♦ Membership
- ♦ Reflections
- ♦ Other

BUDGET AND FINANCES

Have all your membership monies been remitted to Utah PTA, including national, state, and council (if applicable)?

Have you arranged for an Annual Financial Reconciliation (AFR) to be completed by August 1?

Which IRS Filing Is Your PTA Required to File Add: "990N" or "Form 990EZ"?





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INTRODUCTION TO MEMBERSHIP

The strength of your PTA lies in its membership—the parents, teachers, school administrators, business leaders, and community members who devote themselves to making a positive difference in the lives of children. Members are the lifeblood of Utah PTA by providing the passion, leadership, and hard work needed to fulfill Utah PTA’s Mission.

Every individual who joins PTA is giving something, not only to his or her child, but to every child. Imagine how much stronger your community could be if every parent, every community member, and every business leader who could be involved in PTA did get involved.

Attracting new members, and retaining current ones, is among the most important duties of a PTA. A strong membership is essential for PTA to be a force in decisions involving the welfare and education of children. A thriving membership drive doesn’t just happen. It requires good planning and year-round attention from leaders like you.

Your PTA should plan and hold a kickoff membership campaign at the beginning of the school year and then continue membership recruitment efforts throughout the year. Every PTA sponsored event and every school sponsored event is an opportunity to recruit new members, and every participant is a potential PTA member or supporter! Successful membership recruitment drives are essential to bring new volunteers and excitement to your PTA.

September is Utah PTA Membership Month and PTAs everywhere will be launching local membership campaigns. The campaigns will build on the excitement of children going back to school and encourage parents to get involved in their children’s lives. Utah PTA Membership Month provides an opportunity for PTAs across the state to create joint membership events in our communities.

January is another important back-to-school period and a great time to recruit new members. Parents are resolved to be more involved, and new families may have moved into the community. It is a great time to remind parents that it’s not too late to join PTA to make a real difference for their children and schools in the current school year.

Many PTAs run only one membership campaign a year – in the fall. PTAs that run more than one campaign a year have, on average, 20% more members. That’s because potential members have more opportunities to say “yes” to becoming a member. Nationwide, approximately 18% of PTA members join in January and February, second only to the traditional, fall back-to-school campaign period.

To bolster your membership recruitment activities, we have developed a suite of materials, including a campaign toolkit that outlines how to effectively communicate the value of PTA membership, a suite of dynamic visuals and collateral materials, and a campaign roll out checklist. These materials are available at UtahPTA.org/membership. Additional tools and resources to help you develop programs and increase participation in your local PTA are available in the “Local PTA Leader Kit” on the National PTA website, PTA.org.



GUIDELINES FOR THE MEMBERSHIP CHAIR

Responsibilities of the Membership Chair

The membership chair is responsible for facilitating the work of the Membership Committee and ensuring timely, accurate communication with other PTA committees and officers. The Membership Chair and Committee should develop a membership growth plan that will direct the activities of the committee. This plan will create membership recruitment and retention strategies that will lead to overall membership growth. Other responsibilities of the chair include:

- ♦ Be the first one to join PTA! Ensure that all members of your PTA board and other PTA committees join also.
- ♦ Attend scheduled meetings as determined by the local president, including leadership and membership training at the Utah PTA Leadership Convention, for important training and information.
- ♦ Know your council, region, and Utah PTA membership representatives.
- ♦ Create and lead the Membership Committee in development efforts to reach membership recruitment and retention goals.
- ♦ Follow Utah PTA membership calendar and time line.
- ♦ Conduct a membership drive with an effective membership campaign. An effective campaign can strengthen current members' perception of the value of belonging to the PTA. Your members will find out what your PTA is all about, and they will see firsthand that PTA can effectively accomplish its goals. Incorporating their ideas also demonstrates the PTA's interest in members' opinions, skills, and knowledge, and shows individual members how they can be advocates and be a voice for all children.
- ♦ PTA members who join PTA through MemberHub can print their own membership card. If your PTA is not using MemberHub, distribute membership cards to local members (You may receive membership cards from your council president or region director).
- ♦ Maintain accurate membership records and relevant information on the work of the Membership Committee.
- ♦ Maintain a membership procedure book which includes:
 - 1) Local bylaws
 - 2) Local PTA calendar
 - 3) Committee list
 - 4) Membership roster
 - 5) Campaign
 - 6) All membership information
- ♦ Work with the council, region, and Utah PTA membership representatives to ensure membership goals are being met.
- ♦ Check UtahPTA.org for membership updates and for additional helpful information and resources.
- ♦ Adjust local dues, according to Utah and National PTA dues increases, by following the appropriate procedure.
- ♦ Apply for Utah PTA membership awards.



Develop a Membership Committee

- ♦ Collect and process dues on a monthly basis by the 25th of each month.
- ♦ The goal of the Membership Committee is to build an informed, active membership that supports the Mission, Purposes, policies, and programs of the PTA. Under the direction of the Membership Chair, the committee should develop a membership recruitment and retention plan that emphasizes a year-round effort to involve new members. Well thought-out committee plans made early and carried out with enthusiasm and imagination throughout the year will contribute to the success of membership development.

Committee Size

- ♦ The size of the committee will vary, depending on the needs of the local PTA
- ♦ Most Membership Committees will include three to ten members

Committee Composition

- ♦ Local PTSA committees should include parents, teachers, principal, and at least one student
- ♦ Local Membership Committees should include a representative from all areas of the local school community

The Membership Committee May Include:

- ♦ **Principal**—to provide administration assistance
- ♦ **Treasurer**—to coordinate collection and remittance of dues
- ♦ **Publicity Chair**—PTA Public Relations
- ♦ **Program Chair**—to coordinate school events and membership opportunities
- ♦ **Hospitality Chair**—to welcome and greet everyone at meetings and all school functions
- ♦ **Teacher Vice President**—to promote faculty involvement
- ♦ **Student Representative**—to promote student membership in PTSA
- ♦ **Community Representative**—to reach out to supportive business/partnerships
- ♦ **Parent**—to assist with friendly personal invitations and phone call follow-up
- ♦ **Diversity and Inclusivity Chair**— Representative to reach out to all parents

10 Tips for Launching a Successful Membership Campaign:

1. Form a Membership Committee
2. Choose a campaign theme
 - ♦ Decide how to implement Utah PTA's yearly membership campaign theme or choose one that best fits your PTA.
 - ♦ Using a theme generates interest and enthusiasm.
 - ♦ Display your theme in a high-traffic area of the school.
3. Set goals
 - ♦ The Membership Committee sets membership goals pertaining to membership growth.



- ♦ Make sure the goals are reasonable and attainable, yet challenging.
 - ♦ Choose goals that fit your individual strengths, comfort level, budget, time, and expertise.
4. Target potential members: Retain and Recruit
 - ♦ Assign committee members specific responsibilities:
 - Retaining members.
 - Recruiting new members.
 - Increasing male engagement.
 - Asking teachers and staff to join.
 5. Have a plan
 6. Sell the value of PTA membership
 - ♦ Recruiting new members goes hand-in-hand with making sure they find value in PTA and renew their membership the following year.
 - ♦ Emphasize to new members what they get for their membership dues.
 - ♦ Keep members motivated through on-going communication, opportunities to volunteer, and recognition.
 - ♦ The number one benefit that PTA members receive from PTA membership is the ability to help their own child.
 7. Incentives/awards/prizes
 - ♦ Post membership goals and progress in a high traffic area of the school and in newsletters.
 - ♦ You may choose to offer discounts and incentives for membership promotion.
 8. Campaign all year long
 - ♦ Every event your school or PTA holds is a chance for members to join PTA. Set up a table to have sign-up opportunities available.
 - ♦ Continue to ask members to join throughout the year.
 - ♦ Continue to promote your PTA throughout the year.
 - ♦ Coordinate with school personnel to include PTA membership materials in new student packets in the school office.
 - ♦ Schedule your recruitment and retention activities throughout the year, particularly at back-to-school time and the beginning of the new year in January.
 9. Use your resources and follow through
 - ♦ Don't reinvent the wheel
 - ♦ Plans are worthless unless they are put into practice
 10. Evaluate and adjust accordingly
 - ♦ Seek feedback from committee members and PTA members. Regardless of whether the evaluation is done through a formal survey or informal communication, it should be systematic, recorded, and used to adjust and improve the goals of the Membership Committee.



PTA MEMBERSHIP ADVANTAGES

LOCAL

1. The nominal yearly dues support the local, council, state, and National PTA and are not a fundraiser.
2. Membership that extends locals' influence beyond their community, helping to secure state and national action for the benefit of all children.
3. A proven organization of volunteers that unite to provide help, resources, and support for students, parents, teachers, administrators, and schools.
4. A local organization that provides information, resources, and a variety of programs and activities to enhance the education of children and youth.
5. Local leadership training: Leadership Convention, local leader handbooks, local PTAs field service, Diversity and Inclusivity leaders, financial training and oversight, newsletter, etc.
6. Advocacy: A united voice for all children in local communities. Take Action Network, Advocacy Conference, PTA Day at the Capitol, etc.
7. Local and state award recognition opportunities, etc.

STATE

1. Operating dues from local PTAs set at **\$1.75** per member to support Utah PTA functions, resources, programs, and activities.
2. State-wide leadership training: child advocacy; local, council and region leadership, Leadership Convention, website: UtahPTA.org, etc.
3. Advocacy: a united voice for all children at state legislative and executive levels of government. Take Action Network, Advocacy Conference, oversight of school trust lands, PTA Day at the Capitol, etc.
4. State-sponsored programs that enrich the lives, talents, and interests of students: Reflections, Battle of the Bands, Hope for Tomorrow, Red Ribbon Week, Teen Healthy Relationship Month, etc.
5. State and national award recognition opportunities: outstanding volunteers, educators, administrators, PTA members, etc.
6. Scholarships for students; grants to locals to assist in arts education.
7. Representation at National PTA Conventions concerning Utah PTA members' concerns and issues.
8. Representation on boards and committees with cooperating partners and agencies for children.

NATIONAL

1. Operating dues from local PTAs are set at **\$2.25** per member to support National PTA functions, resources, programs, and activities.
2. Advocacy: a united voice for all children at national legislative and executive levels of government.
3. Nation-wide training sessions and workshops for local and state leaders and members.
4. National resources for all PTA leaders, members, and parents.
5. National member-to-member network for information and input on child advocacy issues.
6. Member benefits: discounts on goods and services from member benefit providers.
7. E-Newsletters: Weekend Update, Leadership Briefing, Advocacy Insider, and *Our Children* magazine.
8. Website PTA.org: parent resources, e-learning courses, webinars, etc.
9. National programs: Take Your Family to School Week, Reflections, etc.
10. National PTA Awards: Healthy Hydration Grants, PTA Connected Smart Talk Conversation Grants, STEM + Families Science Festival Grants, STEM + Families Propelling Our World Grants, Mary Lou Anderson ArtsEd Grants, Phoebe Apperson Hearst Awards, Jan Harp Domene Award, and many Advocacy Awards.



THE VALUE OF UTAH PTA

Where Your \$1.75 in State Dues Go

Leadership Training

- Utah PTA website - UtahPTA.org
- Utah PTA Leadership Convention
- Utah PTA handbook for local PTA boards
- Training handbooks for leaders
- Utah PTA app
- Field service for local PTAs
- Region trainings
- Financial training and oversight
- National Standards for Family-School Partnerships
- Student Leadership Conference
- Social media
- QPR training for suicide prevention

Advocacy Efforts

- Training on how to work with policy makers
- Information on current issues affecting children and families
- Take Action Network
- Legislative Bills Sheets
- PTA Day at the Capitol
- Advocacy Conference
- Oversight of school trust lands
- Training on how to work with superintendents, principals and teachers
- Represent parents on coalitions with legislators, other advocacy groups, and various prevention and health groups, including the Governor's Education Excellence Commission, and the Utah State Board of Education (USBE)

PTA Programs

- Reflections
- Battle of the Bands (PTSA)
- Schools of Excellence
- Ribbon Week
- Healthy Relationships Month
- Family Reading Experience
- Come Play With PTA
- PTA Take Your Family to School Week
- Teacher Appreciation
- Practical PTA
- Access to information on other programs

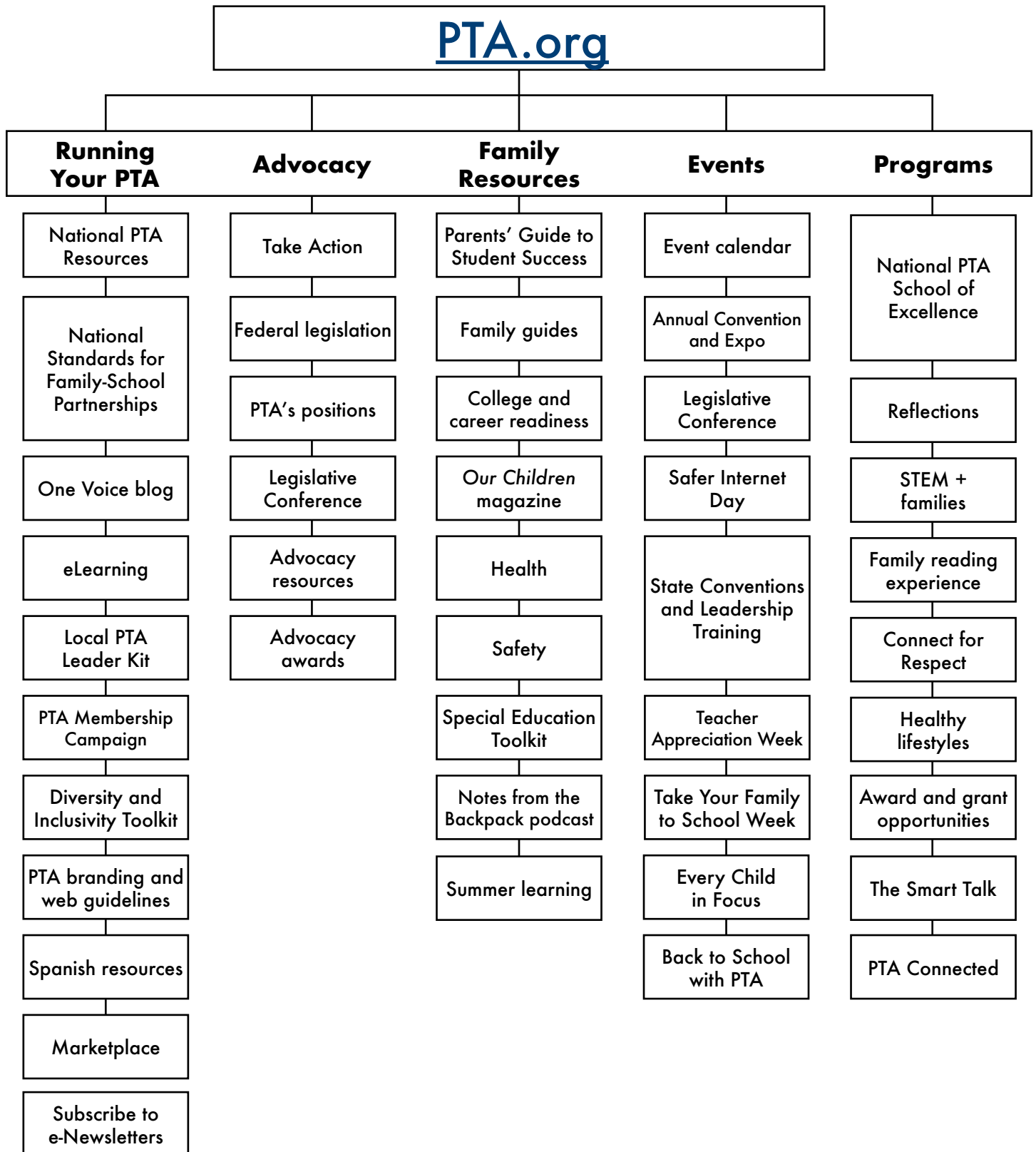
Awards & Grants

- Utah PTA Awards—Outstanding Administrator, LEAP, Spirit of PTA, Advocacy, Engagement, Development, Spirit of Inclusivity, Gold Star, Outstanding Support Staff, Outstanding Volunteer, Outstanding Elementary Educator, and Outstanding Secondary Educator
- Arts Education Fund Grants
- Membership Awards—Back-to-School, Membership Magic, Grateful for Membership, Spirit Award, What is Your PTA Story?, We {heart} PTA, STARS Award, MARS Award, Super PTSA, Award of Excellence in Membership Promotion, Double Your Membership, and One Voice for Every Child Award
- Student Scholarships



THE VALUE OF NATIONAL PTA

Where Your \$2.25 in National Dues Go



UTAH PTA MEMBERSHIP AWARDS

Information

The purpose of Utah PTA Membership Awards is to help increase membership by serving as a motivational incentive and to provide a meaningful reward to those schools who have promoted membership throughout the year.

PTAs may apply for as many awards as they would like. Many awards have similar criteria. Award applications can be found on the Utah PTA website UtahPTA.org/Membership-Awards. Each award application must include a separate application form. Keep a copy of your application and supplemental materials. Applications and materials will not be returned to you.

Information and Forms for Utah PTA Membership Awards can be found:

- ♦ On the Utah PTA Website: UtahPTA.org/Membership-Awards
- ♦ On the Utah PTA App, “Utah PTA One Voice” on the Awards icon



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NOMINATION AND ELECTION GUIDELINES

For Local PTAs

The officers of your PTA have the important responsibility to ensure that those who succeed them are nominated and elected according to PTA nomination and election procedures.

These guidelines are to assist your officers, the members of your Nominating Committee, and all members of your PTA who are interested in making this a successful process.

It would be well to consider your PTA nominations and election as ongoing. Members of your PTA are being prepared to participate in your nomination and election process as they work together and learn about individuals' strengths and leadership skills. "An organization is the lengthened shadow of its leaders," as Voltaire stated.

PTA uses the method of nomination for office by a Nominating Committee. A Nominating Committee ensures that:

- ♦ The qualifications of each nominee are considered before a name is presented
- ♦ The consent of each nominee to serve is obtained
- ♦ There is at least one qualified nominee for each office
- ♦ The nominee is favored by more than one person

The choice of who is elected as an officer, however, is not the decision of the committee. Additional nominations may be made from the floor of your general membership meeting for nominations, and your officers are elected by the general membership of your PTA.

As soon as your Nominating Committee is elected, your PTA president shall give the members of your committee a copy of these guidelines in order for them to understand their responsibility and be prepared for their meeting(s).

"Candidate" is used in these guidelines to identify all who are considered as a possible nominee for an office in your PTA.

"Nominee" is used in these guidelines to identify the person elected by your Nominating Committee to stand for election to a specific office. Those members of your PTA whose names are placed in nomination at your nominations meeting are also designated as nominees.

When information quoted from your bylaws is included in these guidelines, its location found in your bylaws follows and is designated by article and section, e.g., (1:1).

Throughout these guidelines "PTA" also implies "PTSA," if applicable.



THE NOMINATING COMMITTEE

Your PTA Nominating Committee is responsible to seek out and nominate the best-qualified eligible person for each office for which elections are to be held. It is one of your most important committees and is your most responsible, sensitive, and deliberative body. Therefore, election to the Nominating Committee is one of the highest honors bestowed by your PTA and should not be a popularity contest.

Because your committee has a tremendous influence in shaping the future of your PTA, the members of your PTA must take the work of the committee as seriously as the committee itself will need to do and must carefully elect those who serve on the committee.

No one automatically serves on your Nominating Committee by virtue of his position in your PTA or the school.

1. Neither your PTA president nor president-elect shall serve on the committee. The president shall orient the committee to its duties and procedures at its first meeting and then leave the meeting (VI:5e).
2. One officer other than your president shall be elected to the committee by the officers (VI:5b).
3. Any member of your PTA considering becoming a nominee shall decline being nominated to serve on your committee.
4. It is recommended that your principal not serve on your Nominating Committee but act as a consultant to it (VI:5f).

The composition of your committee should reflect the diversity of your PTA community, e.g., PTA experience, geographical areas, feeder schools if a secondary PTA, etc.

Members of your Nominating Committee:

1. Are current members in good standing of your PTA (VI:5b)
2. Are elected by your general membership (not your officers or board) in the month specified in your local bylaws, but always before December 31st (VI:5a/b/j)
3. Are elected on their merit, ability, integrity, and discretion
4. Are viewed as wise, tactful, circumspect, persuasive, and able to keep confidences
5. Approach the important work of your committee in all seriousness, are free from personal bias, and are willing to attend committee meetings and devote adequate time to this work
6. Need the following traits and personal and general qualifications:
 - A. Knowledge of, interest in, and enthusiasm for the purposes and programs of PTA
 - B. Broad acquaintance with your PTA membership and general knowledge of potential nominees' qualifications and abilities
 - C. Understanding of the qualifications and obligations pertaining to all offices to be filled
 - D. Ability to give objective consideration to find the best qualified leaders for your PTA
 - E. Sound judgment and skill in evaluating possible nominees
 - F. Courage to express their ideas and defend their convictions

Each member brings to this committee unique knowledge, insight, skill, and personal experience. By working together, the members form an effective team and blend their collective ideas, qualities, wisdom, and contributions to become a whole greater than its parts that will help ensure continued strong leadership for your PTA.



ELECTING YOUR NOMINATING COMMITTEE

Your bylaws designate when your general membership meeting to elect your Nominating Committee is to be held. During that meeting, immediately before your Nominating Committee is elected, your PTA president or secretary reads aloud your bylaws section pertaining to the committee (VI:5).

Your bylaws delineate important information about your Nominating Committee (VI:5):

1. Your general membership elects your Nominating Committee in a general membership meeting as designated by your bylaws (prior to December 31). This ensures that the committee has ample time to meet and elect its nominees. In turn, your PTA members will have ample time (at least 14 days before the election) to consider the nominees (VI:5b/j).
 - a. The number to be elected to your Nominating Committee is at least three and always uneven. All members of your committee must be members of PTA for at least 7 days prior to election.
 - b. Your Executive Committee (officers) elects one member (not your PTA president nor president-elect) of the committee from among its members. The remaining committee members are elected by the general membership of your PTA. Any officer or member desiring to be elected to an office shall decline being nominated to your committee.
 - c. The committee elects its own chair.
 - d. No meeting of your committee shall be held with fewer than three members present.
2. The number of alternates (two-five) elected to serve on your committee is designated in your bylaws (VI:5c).
 - a. Your alternates are elected by your general membership immediately after the members of your committee are elected.
 - b. Immediately after your alternates are elected, your general membership determines the order in which your alternates will replace committee members if necessary. The method of determining the order is voted on by your membership and could be by: the order in which they were nominated, the number of votes received, last name alphabetically, request of the alternates themselves according to personal circumstances, etc.
 - c. An alternate attends committee meetings only as the replacement of a committee member.
 - d. If a committee member is unable to attend a meeting, the first alternate attends only that meeting as a voting member of the committee.
 - e. If a committee member resigns, fails to attend two committee meetings, or is elected to be a nominee for an office, the first alternate permanently replaces that committee member.

Immediately after the committee members (and alternates) are elected and before the meeting is adjourned, they meet briefly to elect the chair and determine the date of their first meeting, which should be soon enough to allow sufficient time to consider nominees. Last-minute meetings make for ill-advised decisions.

Your PTA president then announces the date of the first committee meeting to your general membership and that no one else talks about committee business. Any member of your PTA may submit suggested candidates for any office (in a sealed envelope with "Attention Nominating Committee Chair" written on the envelope front) or via email to your committee chair prior to the first meeting of your committee. Also, prior to the first meeting of your committee, an officer who has served only one term and would like to be renominated should submit a letter of intent to your committee chair. Any such envelopes shall remain unopened until the first committee meeting. After that time no additional recommendations may be made to the committee.



NOMINATING COMMITTEE CHAIR

The Nominating Committee Chair Shall:

1. Retain all envelopes/email with suggested candidates or letters of intent unopened until the first committee meeting.
2. Make every effort to hold meetings when all members can attend. Ask the principal if you could be in contact with them during your consideration of the Teacher Vice President nominee.
3. Provide copies of your bylaws and your standing rules/job descriptions for each committee member. Also, be sure a membership roster is available to committee members at your meetings.
4. After the committee has met and voted, contact elected nominees (with the committee members present), inform them of specific responsibilities of the office, and obtain their consent to serve if elected.
5. Advise nominees to attend the general membership meetings at which their names shall be placed in nomination, elections will be held, and, if elected, they will be installed.
6. Advise committee members of the results of the contacts if calls have to be made after the meeting.
7. Assist the committee in compiling its report, which includes the name of the nominee for each office and which is signed by the committee members.
8. As soon as possible, notify those who submitted letters of intent or were suggested as nominees but did not receive the nomination.
9. Present the committee report to the Executive Committee as soon as a nominee has accepted for each office and at least five days prior to the committee's report at the general membership meeting designated for nominations in your bylaws (VI:5j).
10. Assure that the list of nominees is distributed to all members of your PTA after the nominations meeting.
11. Reconvene the committee in the event a nominee withdraws before the election is held and there is no other nominee for that office.



BEFORE THE FIRST NOMINATING COMMITTEE MEETING

- ♦ The members of the committee shall review the information in these guidelines, the general election information and qualifications for and duties of all offices to be filled as listed in your bylaws (VII:1-5), and the job descriptions in your standing rules.
- ♦ No discussion about nominees or committee business shall take place between committee members before the first meeting of the committee.
- ♦ No committee member shall talk to anyone about becoming a candidate before the committee has met and elected a nominee.
- ♦ No one else should ever talk with members of the committee or anyone else about committee business.
- ♦ All suggestions for candidates are given to the committee chair, in writing, in a sealed envelope or via email before the committee's first meeting.

The members of the committee shall review the following general qualifications needed by candidates to be considered for nomination to any office:

1. Be a current PTA member in good standing. Nominees must be PTA members for 30 days prior to the announcement of their nomination.
2. Understand and be enthusiastic about and supportive of PTA and its programs.
3. Have a knowledge of and abide by the Purposes, bylaws, Mission, policies, and procedures of PTA, and some knowledge of parliamentary procedure.
4. Have a high sense of justice, courtesy, dependability, open mindedness, moral courage, an ability to get along with people, and a sense of humor.
5. Be able to be relied upon to give PTA a satisfactory level of priority and commitment.
6. Be fair, objective, and able to subordinate personal interests to the interests and well-being of PTA.
7. Have vision and be innovative.
8. Have carried out all responsibilities well.

Before its first meeting the committee may be made aware of possible candidates to consider as nominees:

1. The committee may send out an interest survey to your PTA members asking for member interest in serving in an office and should ask current board members to submit written suggestions for candidates.
2. Recommendations of candidates may be submitted in writing in a sealed envelope or an email to the nominating committee chairman by any member of your PTA prior to the first meeting of the committee. The consent of the person is not necessary to suggest his name to the committee. These are suggestions only—they are not mandatory and are confidential.



3. If current officers who have served only one term want to be considered for re-election, they must submit a letter of intent stating that interest, in writing in a sealed envelope or an email, to the Nominating Committee chair prior to the first meeting of the committee. The committee is not obligated to nominate an incumbent to serve a second term and shall do so only if it is in the best interest of your PTA.

Committee members should ask themselves these questions as they prepare for their first meeting:

1. What are the Purposes, Mission, and goals of PTA?
2. What do we need (people with what expertise or PTA experience, ties to the community, etc.)?
3. What do we expect (explain in detail—job description, time commitment, meeting attendance, committee work, etc.)?



THE NOMINATING COMMITTEE MEETING

Electing the Nominee for Each Office

The well-being of your PTA shall be the top priority of the Nominating Committee. The committee must put the good of your PTA above personal preferences.

The major responsibility of the committee is to nominate the best qualified eligible person for each office to be filled.

Prior to the committee's considering candidates to become nominees, your PTA president shall orient the committee, including the alternates, to its duties and procedures. Your PTA president and alternates then leave the meeting. Then the committee shall review again the election information (VI:1-4) and duties of officers (VII) in your bylaws, job descriptions of officers in your standing rules, and general qualifications for nominees.

The committee opens all recommendations and letters of intent together at their first meeting and makes a list from them for each office to be filled. The committee may add its own suggestions. Regardless of the number of times an individual is suggested for an office, the committee must evaluate each equally and by the same standards as all other candidates.

Consideration of candidates should be an orderly process.

1. Committee members must talk frankly and openly about possible nominees but only during official meetings.
2. These discussions must be kept strictly confidential! Committee members shall not discuss the work of the committee outside the committee group ever!
3. No information, including the reasons for accepting or rejecting a candidate, should ever leave the committee meeting. It is especially unfair to your PTA and to the member who accepts a nomination to discover that others received prior consideration.
4. If any volunteer involved in a local/council PTA has been included in/or is part of charges of fraud or mishandling of funds, they will not be allowed to serve in any position on your board that deals with handling money.

An incumbent officer (who has served only one term and who submits to the committee a letter of intent of willingness to serve a second term) must be considered by the committee as any other candidate. Only if the committee determines the incumbent is the best nominee for your PTA is the incumbent elected to be a nominee. An incumbent does not automatically serve a second term.

If your PTA has a **president-elect**, they automatically succeeds to the office of PTA president and your PTA president leaves office at the end of the term (VI:4a).

If your president-elect is unable to succeed to the office of PTA president, the committee shall nominate an eligible person for both PTA president and president-elect.

1. If both the PTA president and president-elect have served only one term and could serve another term, one option would be that both the PTA president and president-elect could be nominated to serve another term in their same office.



2. A second option would be that the committee would vote to re-nominate either your PTA president or president-elect and elect a new nominee for the other office.
3. A third option would be to have a different person nominated to both offices. The decision would be reached by determining what is in the best interest of your PTA.

The number of your **vice presidents** includes your principal and at least one teacher in your school (VI:4a).

They are both called vice presidents. The number of additional vice presidents is listed in your bylaws.

1. It is important to consult with the principal after a preliminary discussion about possible teacher candidates and before electing a teacher to be the Teacher Vice President nominee, in order to be certain that there would be no conflicts with other responsibilities. The nominee for Teacher Vice President should in turn be elected as a nominee by the committee.
2. Both the principal and Teacher Vice President nominees are introduced with the slate of nominees at your general membership meeting for nominations.

Only in rare circumstances should a Nominating Committee member be considered as a nominee for an office and only when it is in the best interest of your PTA.

If a member of the committee is considered as a candidate for election, that member shall be dismissed from the meeting during the discussion and voting concerning that particular nomination. If the member is not elected to be the nominee, they may remain on the committee if they desires. If the member is elected to be a nominee, they shall automatically be dismissed from the committee and shall be replaced by an alternate (VI:5c).

The decisions of the committee are made through the ballot process. A separate vote shall be taken by ballot for each office.

A majority vote of the committee members shall be required to elect a nominee. An alternate nominee may also be elected in case the first nominee declines the nomination.

The committee shall consider separately each office to be filled. All nominees shall be determined with the same care. The committee shall elect separately, by ballot, by majority vote, a nominee for PTA president (only if you have no president-elect), president-elect, vice presidents, secretary, and treasurer in that order, until there is a nominee for each office to be filled.

Once the committee has elected a nominee for each office, the members shall have some time to reflect on the list of nominees before any contacts are made.

If, after a reasonable amount of time, the members of the committee express a change of mind, additional discussion and election of nominees take place.

If, after a reasonable amount of time, the members of the committee continue to express support of the nominees they elected, the nominees are contacted following the guidelines in the next section.



Contacting Nominees

While the Nominating Committee members are still in their meeting, the chair shall personally contact the nominee elected by the committee for the first office to be filled. If possible, the first office considered must be filled before nominees for other offices are contacted. If the person accepts, the chair contacts the nominee elected by the committee for the next office. If the person declines, the elected alternate shall be contacted by the chair. If both the elected nominee and alternate decline, the committee considers and elects a new nominee.

The job description and expectations shall be fully explained to each nominee as contacted and they should be given time to consider. It is helpful if those invited to be nominees discuss their potential responsibilities with family members to determine the family's willingness to support them if elected.

The chair should also suggest that the nominee consider and be given the opportunity to ask questions, including the following, in making a decision:

- ♦ What will I be expected to do?
- ♦ What are the PTA's Purposes, Mission, and goals? Do I believe in and agree with them?
- ♦ Is this the opportunity I am looking for?
- ♦ Do I have the time?
- ♦ Do I have the expertise?

It is rarely advisable to try to talk a reluctant person into accepting a nomination.

When nominees have accepted for all offices, the committee compiles its report, listing the nominee for each office, and each member of the committee signs it. The chairman presents the report to the Executive Committee at its first meeting after completion of Nominating Committee work, which must be at least five days before your general membership meeting for nominations.

If the committee is unable to find a nominee for an office, it reports that fact to the Executive Committee and to the members of your PTA in its report at your general membership meeting for nominations.



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

Please submit to 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 for at least 30 days

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 14 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 secretary
(school)

_____ by _____, _____.
(give name and 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.*



GENERAL MEMBERSHIP MEETING FOR NOMINATIONS

Your PTA nominations are officially conducted at a general membership meeting of your PTA. This meeting shall be held when designated in your bylaws (at least 14 days before your election meeting) to give ample time for members to consider the nominees (VI:5j). This meeting can be held in person or virtually.

During your general membership meeting for nominations:

1. Your PTA president conducts all business of your PTA, including the nominations.
2. Immediately before the committee chairman reports the nominees, your PTA president or secretary reads aloud the portions of your bylaws pertaining to nominations (VI:5g-k) and to elections (VI:1-4).
3. Your PTA president then calls on the committee chair to present the committee report.
4. No action is taken on the report (no vote is taken to accept the slate of nominees).
5. After the committee's report, additional nominations may be made from the floor by members of your PTA. Only members of your PTA who have given their consent to serve may be nominated for any office.
 - A. Your PTA president, taking each office in turn, says, "X has been nominated for the office of —. Are there further nominations for the office of —?" If the Nominating Committee has brought forward no nominee for an office, your PTA president announces that and asks for nominations from the floor.
 - B. If a member wishes to place a name in nomination, he is recognized by your PTA president, stands and says, "Mister/Madame President, I nominate Y for the office of —." Your PTA president then states, "Y has been nominated. Are there further nominations for the office of —?"
 - C. If other persons are nominated from the floor, their names are added to the list of nominees.
 - D. When time has been allowed and no one else wishes to place a name in nomination, your PTA president may say, "Hearing no further nominations, the chair declares nominations for the office of — closed."
 - E. When nominations have been offered for all offices, nominations may be closed by a motion and a two-thirds vote, or by your PTA president. It is usually best to allow your PTA president to close nominations when no one wishes to make additional ones. This closes the nominations by unanimous consent instead of by a motion, which requires a majority vote.
 - F. If your PTA president closes nominations, they may be reopened by a motion and a majority vote of your PTA members.
6. Your PTA president then restates the slate of nominees and asks each one to stand.
7. The list of all nominees is recorded in the minutes of your nominations meeting.
8. If there is still no nominee for an office by the end of the meeting, the president announces that.
9. Your PTA president announces the date of the election meeting and that the only nominations allowed from the floor at the election meeting will be those who file a letter of intent to be a nominee with your PTA secretary at least five days before your election meeting (VI:6).
10. Your PTA president also announces that only the members of your PTA shall be able to vote at the election meeting.



Note: All nominations of eligible members of your PTA are valid. Nominations from the floor are as valid as those from the Nominating Committee. The report of the committee is only a statement of preference and does not control the election in any way.

After your nominations meeting, your committee chair ensures that all of your PTA members receive notification of the list of nominees and the date of your election meeting. This may be done in your PTA newsletter, by email, and/or by separate notice.

The Nominating Committee is automatically discharged when its report is presented to your PTA membership. However, if a nominee withdraws before the election (and there is no other nominee for that office and time permits), the committee reconvenes and elects a new nominee for that office.

As soon as possible after it is known that there are two or more nominees for any office, the officers shall meet to elect an Election Committee (“Tellers” or “election judges”) of three or five members. Please see “Election Committee” section.

If the secretary receives a letter of intent to be a nominee at least five days before the election meeting, he or she immediately notifies the president. The president then notifies your general membership of the additional nominee.



GENERAL MEMBERSHIP MEETING FOR ELECTIONS

Electing officers is one of the most important duties of the members of your PTA. Officers should be elected for their abilities and their willingness to serve your PTA. Your bylaws designate when your elections are to be held, which shall be prior to March 31, and how long your term of office is.

Only those persons who are members in good standing of your PTA and have given their consent to serve if elected shall be nominated or elected to an office.

Only current members of your PTA are allowed to vote (VI:3).

1. Your secretary and the tellers shall have a current membership roster.

Your bylaws designate the minimum number of your PTA members who must be present to constitute a quorum (IX:8).

1. Before the election, it must be determined if a quorum is present. If the meeting is held virtually, the minimum number of votes to meet a quorum must be received and noted in the minutes.
2. If a quorum is not present, the election meeting must be rescheduled. If your election meeting is held in March, you should schedule it during the first two weeks in case a new meeting must be scheduled.

If there is more than one nominee for an office, that election shall be by ballot (VI:4c). The procedure for collecting ballots shall be established by the officers and tellers before the meeting and announced before voting begins. (Ballots may be deposited by voters in a ballot box or in a container.)

During your general membership meeting for elections:

1. Your PTA president conducts all business of your PTA, including the elections.
2. Before the election business begins, your PTA president or secretary reads aloud the portion of your bylaws pertaining to elections (VI:1-4).
3. Your PTA president states again the list of nominees from the nominations meeting and then asks your secretary if any letters of intent to be nominated were received at least five days before your election meeting.
4. If your secretary received none, your PTA president declares nominations closed. (Proceed to step 6.)
5. If your secretary received any letter(s) of nomination, the secretary so reports.
 - A. This (These) nominee(s) name(s) must then be placed in nomination from the floor.
 - B. This (These) nomination(s) does (do) not require a second.
 - C. Only the names of the (those) person(s) who filed a letter of intent to be nominated with your PTA secretary at least five days before the meeting may be placed in nomination during your election meeting. Your PTA president does not ask for any additional nominations at the meeting.
6. When there is only one nominee for an office, the election for that office may be by voice vote if there is a motion adopted to do so (VI:4c).



- A. For election to an office when there is only one nominee, your PTA president says, “Our bylaws state that when there is only one nominee for an office, the ballot may be dispensed with and the election held by voice vote. Is there a motion for a voice vote for the office of —?”
 - B. A member of your PTA is then recognized by your PTA president and says, “I move that election for the office of — be held by voice vote.” Your president then asks for a second to the motion. After the second is received, your president says, “All in favor of holding the election for the office of — by voice vote say ‘Aye’. Those opposed say ‘No’.” A majority vote is needed.
 - C. If the motion fails to receive a majority vote, the vote must be by ballot.
 - D. If the motion passes, your PTA president states, “The motion passes. We will hold the vote for the office of — by voice vote. X is the nominee for the office of _____. All those in favor of electing X to the office of — say, ‘Aye’. Those opposed say, ‘No’.” A majority vote is needed.
 - E. If there is a question about the vote results, the vote must be held again with the members standing and holding up their PTA membership card as they say, “Aye” or “No.”
7. If there is only one nominee for all offices, your PTA president asks for a motion that all officers be elected by voice vote (VI:4c). It is permissible to use both election by voice vote and election by ballot during the same election meeting.
 8. If there are two or more nominees for an office, that election must be by ballot (VI:4c).
 - A. Before the election begins:
 - 1) Each of those nominees is entitled to present a two minute speech.
 - 2) Your PTA president instructs your members how to mark and fold their ballots and when and how the ballots are to be collected.
 - B. Your PTA president announces that the polls are open and for how long.
 - C. The Election Committee conducts the election. (Please see “Election Committee” section.)
 - D. After the voting appears to be completed, your PTA president inquires, “Have all members voted who wish to?” Hearing no response to the contrary, your PTA president says, “The polls are closed.” This closes the polls by unanimous consent rather than a motion, which requires a majority vote.
 - E. The tellers then depart to count the ballots in a separate room or area. (Please see “Election Committee” section for instructions for the tellers.)
 - F. When the tellers have completed their work and compiled their report, your PTA president asks for the tellers’ report to be read. The chair of the committee (or another reporting member) reads the report in its entirety and hands it to your PTA president, who reads it again and announces the election and declares the result of the vote for each office. Your PTA president says, after reading the number of votes received by each nominee for an office, “X, having received a majority of the votes cast, is elected to the office of _____” or “X, having received a plurality (the largest number of votes received by a nominee when there are three or more nominees for an office) of the votes cast, is elected to the office of _____.”
 9. As soon as a nominee has been elected to each office, the elections are complete.



Virtual Election Meeting

1. The president conducts the meeting whether meeting online or by sending information out.
2. The election committee determines the best way to hold the virtual vote and determines the deadline for voting.
3. Voting by email or other online options must be done in a way that is able to verify the voter is a current PTA member and that each member can cast only one vote.
4. Quorum minimums must still be met.
5. The meeting minutes must reflect the method used for voting, the quorum, and the result of the vote.



THE ELECTION COMMITTEE

“Tellers” or “Election Judges”

As soon as it is known that there are two or more nominees for any office, the officers shall meet to elect an Election Committee (of three or more members and always an uneven number) from among the members of your PTA. No nominees for office, anyone related to a nominee by blood or by marriage, or who reside in the same household as a nominee may be a member of the Election Committee. The officers may elect the committee chairman or allow the committee to elect its own chair from among the committee members.

The Election Committee has the responsibility to conduct the election of your PTA officers. The members of the committee may be called “tellers” or “election judges.” In these guidelines they are referred to as “tellers.”

No more than five days before the election meeting (so all letters of intent to be a nominee will have been received by your PTA secretary), the tellers prepare the ballots for each office with more than one nominee, which should all be the same size and color and have the office(s) and nominees’ names printed on them.

In consultation with your PTA officers prior to the election meeting, the tellers establish the procedure for collecting ballots. They may be deposited by the voters in a ballot box, a covered ballot box, or containers. The safest receptacle would be a covered ballot box. If the votes will be collected virtually, a method to verify membership and a platform for ensuring members have only one vote must be determined.

Only members of your PTA shall vote; therefore, ballots are given only to members of your PTA. Your bylaws prohibit voting by proxy (IV:7). Nominees vote but shall not participate in the election process.

Prior to the election meeting the tellers set up a table with a membership roster, ballots, and pens or pencils available. When your PTA president announces that the polls are open, members move in an orderly manner to the voting table.

One teller verifies that each person is a member of your PTA. If desired, your members could sign a voter listing verifying they are members and have received a ballot. The next teller issues each member a ballot. After each member votes, the next teller collects the ballots.

After the polls are closed, the tellers then depart to a separate room or area to count the ballots.

1. Each nominee may designate a person as an observer while the ballots are counted.
2. The tellers begin by counting all the ballots.
 - A. If the number of ballots exceeds the number of ballots issued, the tellers return to the assembly for instruction or re-voting.
 - B. A number of ballots less than the number of ballots issued is ignored.
3. In counting the votes cast, one teller reads the ballot while another records the vote next to the name of the nominee.
4. The other teller(s) carefully observes the reading and recording.
5. Blank ballots are ignored.



6. Illegal votes are counted to determine the number of votes cast but are not applied as a vote for or against any nominee. Illegal votes may include:
 - A. Two ballots folded together (they are recorded as one illegal vote).
 - B. A ballot that is unintelligible.
 - C. A vote for an ineligible nominee, who is anyone not on the ballot since all nominees must have already been presented in the nominations meeting or have filed with the secretary at least five days prior to the election meeting.

These are recorded as illegal votes in the final tellers' report.

The number of votes necessary to elect is determined by the number of votes cast for each office. This includes illegal votes.

A majority or plurality of the votes cast is necessary to elect an officer.

If there is a tie vote, the tellers relate that result to your PTA president. Your PTA president then states, "There is no election due to a tie vote," and another vote is taken.

The tellers prepare a separate report, which should be accurate and account for every vote cast, for each contested office (an office with more than one nominee).

The tellers' report should contain:

1. A heading and date.
2. The office.
3. Number of votes cast.
4. Number of votes necessary to elect.
5. A list of the nominees in the order of the number of votes received.
6. The number of votes received after each name.
7. An accounting of illegal votes.
8. The signature of the tellers, with the chair of the tellers signing first. All tellers should sign the report.

The report does not include the number of members eligible to vote.

The tellers' report is entered into the minutes and becomes a part of the official record of your PTA. Under no circumstances should the totals be omitted in an election out of deference to the feelings of unsuccessful nominees.

When the report is finished, the tellers return to the meeting assembly area. Your PTA president asks for the tellers' report to be read. The chair of the tellers (or another reporting member) reads the report and hands it to your PTA president.

Inasmuch as the Election Committee is created for a specific purpose, it is automatically discharged when its work is completed and its report is received by the general membership of your PTA.



EXAMPLE OF A TELLERS' REPORT

Heading (For example, Main Street PTA election on March 20, 20XX)

1. Office of secretary
2. Number of votes cast 33
3. "Nominee X" received 19 votes
4. "Nominee Y" received 10 votes
5. "Nominee Z" received 1 vote
6. Illegal votes 3
7. X is elected to the office of secretary
8. Signatures of committee members:

Chair: _____



AFTER THE GENERAL MEMBERSHIP MEETING FOR ELECTIONS

The ballots may be destroyed after the election is announced or filed for a designated length of time (such as a month) with your PTA secretary. They are destroyed by the current Executive Committee (officers).

If an office other than 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 your incoming officers, all officers having been notified of the election. (VI:7a) A vacancy in the office of president-elect is always filled by the vote of the general membership of your PTA at a special election meeting called by your PTA president, all members of your PTA having been notified.

After the election has taken place and a vacancy occurs in any office other than president-elect, that vacancy is filled by your incoming officers.

As soon as officers are elected, they shall meet for the purpose of formulating tentative plans for their term of office and, if applicable, selecting commissioners and committee chairs. All ongoing and incoming officers and commissioners should plan to attend the annual Utah PTA Leadership Convention in the spring.

Officers begin their terms and assume their official duties on July 1 following their election and remain in office until June 30 of the next election year.



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PTA/PTSA BYLAWS INFORMATION

- ♦ Bylaws are the legally binding set of rules that guide an organization and are of such importance that they can be changed only after ample (at least 14 days) notice has been given and the members have voted to approve the change (amendment). Bylaws are comparable to a constitution and are organized into articles and sections. Having current bylaws is a requirement to maintain tax-exempt status with the IRS.
- ♦ If you need a copy of your current bylaws, they can be found at UtahPTA.org/Bylaws after logging in to your account. You may print as many copies as needed from the website. Your region director and/or council leadership also have access to the online bylaws and can assist a local PTA with finding their copy.
- ♦ As soon as you are elected, set up a PTA online account and help your incoming Executive Committee set up an account for access to the local bylaws. Study your bylaws so they will be as helpful as possible. Review them again with your Executive Committee at the beginning of the school year and often throughout the year. This will help avoid problems and you will know what to expect during your term.
- ♦ The numbers written in your bylaws must be adhered to exactly—they are not a guideline, but a requirement.
- ♦ Take note of dates and special instructions to help you plan your PTA calendar.
- ♦ The approval and expiration dates of your bylaws are on the front page in red.
- ♦ Bylaws must be submitted to Utah PTA for renewal every three years. Bylaws and amendments are valid only after they are returned to you via email with the red notice on them.
- ♦ Amending bylaws can be done at any time. Instructions for renewing or amending local bylaws are found at UtahPTA.org/Bylaws.
- ♦ The following are some questions about PTA that your bylaws will answer:
 - When your bylaws expire.
 - Your PTA Unit ID Number and EIN. They are on the front page of your bylaws.
 - Your official local name, which always includes “PTA” or “PTSA.”
 - The Purposes and basic principles of PTA.
 - Your relationship with National PTA and Utah PTA.
 - When to submit membership dues—national, state, and, if applicable, council—and the amount of your dues.
 - When to elect your Nominating Committee, how many serve on it, how it should function, and when it must report its nominees.
 - What officers you should elect and when, and the length of their term of office.
 - How to fill vacancies in offices.
 - The duties of each officer.
 - Information about having the treasurer’s books annually reviewed.
 - The duties of your Executive Committee (officers).
 - When some of your general membership meetings are to be held.
 - How many members constitute a quorum for transacting business.
 - How many commissioners you should have and whether they are elected or appointed.



- Who comprises your Board of Directors.
- Information about committees.
- If you are in a council, which council you belong to, how many voting delegates you are allowed, and the amount of your council dues.
- Your fiscal year.
- When you must read and reaffirm your bylaws.
- What is the PTA parliamentary authority.
- How to amend your bylaws.

Meetings—Your PTA must hold at least three general membership meetings during the school year. The purpose of these three meetings should at least include:

- ♦ Approving your AFR and annual budget at your first meeting (prior to October 1)
- ♦ Electing your Nominating Committee (prior to December 31)
- ♦ Nominating your nominees (at least 14 days prior to your election meeting)
- ♦ Electing your new officers (prior to March 31)

Dues—Dues should not be considered a fundraising endeavor and should be an amount low enough to encourage individuals to join. Funds to sustain the programs of your PTA may be raised in other ways.

Officers—National PTA has advised that there are to be no co-officers in PTA. The “president-elect” is the officer who automatically assumes the office of president for the following term and is not a vice president. Your PTA automatically has at least two vice presidents: your principal and a teacher. Additional vice presidents are specified in the bylaws. They are called vice presidents and should be presented with the other nominees at your nomination and election meetings so everyone realizes they are PTA officers. The treasurer shall accept only reconciled books.

Nominating Committee—A Nominating Committee must be elected by your general membership prior to December 31 and must always have an uneven number of members. No committee meeting shall be held with fewer than three members in attendance. The president and president-elect shall not serve on the committee but shall orient the members to its duties and procedures at its first meeting. The president-elect may act as a consultant to the Nominating Committee. The chair is elected by the committee members and should have a copy of the bylaws at each meeting to know the duties of each officer. The committee reports the nominees at a general membership meeting at least 14 days prior to the election meeting. Others who wish to run for an elected office may be nominated at the general membership meeting in which the committee reports or they may notify your secretary at least 5 days prior to the election meeting.

Council Membership—If your PTA is in a PTA council, your council officers will instruct you as to the amount of your council dues and the number of delegates from your local PTA that have the right to vote on your council voting body, although all members of your PTA may attend council meetings. Your president-elect should attend council meetings. Your council may not make any decision that is binding on your PTA without it being presented to and voted on by your council voting body. Your council bylaws are available to view and print at UtahPTA.org/Bylaws. You must sign in with an account to view bylaws.

Amending Your Bylaws—Instructions for amendments are in Article XV of your bylaws. Only information written in the blanks may be amended. Additional information on amending and submitting your bylaws can be found in this section of the handbook in the *Information for Renewing, Amending, and Submitting PTA Bylaws*. If your officers



or members decide an amendment needs to be made to your bylaws, it must be presented at a general membership meeting and/or online or in a newsletter. After at least a 14 day waiting period, the amendment must be voted on at a general membership meeting and approved by a two-thirds vote of the members present and voting. If it is approved, the bylaws need to be submitted to Utah PTA for approval. The guidelines necessary for submission can be found at UtahPTA.org/Bylaws or by using the “quick link” to bylaws on the homepage. Your new bylaws become effective upon approval and notice from Utah PTA. Your official, stamped copy will be available online and for print at UtahPTA.org/Bylaws. Making bylaw amendments within the three year period before renewal will, in effect, renew the local bylaws at the same time and a new expiration date will be given.

Renewing Your Bylaws—This is the responsibility of your president, who may assign this responsibility to another officer. About three months before your bylaws expire, go over them as officers and also compare them with the current bylaws found at UtahPTA.org/Bylaws to see if they are still applicable to how your PTA functions.

If they are still applicable, fill in a new bylaws form as they were last approved at UtahPTA.org/Bylaws. Print or download the new bylaws for posting to your general membership. At a general membership meeting or in a newsletter at least 45 days before they expire, announce that your bylaws need to be submitted for approval and will be posted at the school, in a newsletter, or online, or email the PDF to your membership. List the locations at the school where they may be read by any PTA member for consideration. If any amendment(s) is recommended, it (they) must be submitted to the president by a stated date. The vote to reaffirm or amend the bylaws may not be taken until the bylaws have been posted for 14 days. After the 14 day posting period, a general membership meeting is held and your president asks for a motion and a second to the motion to reaffirm your bylaws in the current form. If they are reaffirmed by a two-thirds vote of the general membership present and voting, your approved minutes are then submitted to Utah PTA. The minutes must show the minimum quorum requirements were met and the result of the vote, whether in person or virtual.

If your officers or general membership decides an amendment(s) needs to be made to your bylaws, follow the instructions in the step above, vote on the amendment(s), and then reaffirm your bylaws at the same general membership meeting. **Note:** Only information in blanks may be amended.

Standing Rules—Standing rules are semi-permanent guidelines adopted by your local PTA for direction, training, and continuity. They may contain additional information about your bylaws or any traditions or specific information that pertains to your PTA. They **may not** conflict with your bylaws. They may be amended or rescinded by a two-thirds vote at any meeting or by a majority vote if previous notice has been given. Additional standing rules may be adopted at any general membership meeting by a majority vote. A standing rule may be suspended for the duration of any general meeting by a majority vote.

Your bylaws and standing rules need to be retained in your officers’ procedure books and passed on to incoming officers.



BYLAWS INFORMATION (CONTINUED)

It is important to be familiar with Utah PTA Bylaws as they are the governing documents for Utah PTA. The most recent copies of Utah PTA Bylaws can be found at UtahPTA.org/Bylaws or on the Utah PTA app. You must create an account and log in to view bylaws.

The Utah PTA Bylaws are reviewed at least once during a president's term by the Board of Directors and proposed amendments must be voted on by the general membership (generally done at the Leadership Convention). Local PTA leaders may suggest amendments to the Utah PTA Bylaws by submitting the form on the following page (or found online). The form must be received no later than October 1 of the current year for the amendment to be considered.

Local and council PTA/PTSAs should study their own approved set of bylaws on a regular basis to be familiar with the rules set forth for governing your local PTA/PTSA. All approved bylaws are available online at UtahPTA.org/Bylaws. At a minimum, the president and secretary should have a copy available for reference at all times. It is recommended that all members of the Executive Committee have access to a copy of your approved council and/or local PTA/PTSA bylaws.

Local and council bylaws may be amended from time to time after consideration, discussion, and an approving vote of the Utah PTA Board of Directors. The most current approved version is always available at UtahPTA.org/Bylaws.

Amendments to local and council bylaws made by the Board of Directors take effect immediately and apply to all local and council PTA/PTSAs, but do not require a renewal or amendment at the local or council level.



SUBMITTING A PROPOSED PTA BYLAWS AMENDMENT FOR UTAH PTA BYLAWS

(This form is to be used only if you would like to submit a proposed amendment for the Utah PTA Bylaws—Do not use this form for council or local PTA/PTSA amendments.)

Due October 1, 2023 in the Utah PTA office.

Region _____ Council Name _____

Local PTA Name _____ President's Name _____

President's Address _____

President's Phone _____ Email _____

Please use a separate form for each proposed amendment to the Utah PTA Bylaws

Article _____ Section _____ Now reads: _____

Article _____ Section _____ Proposed to read: _____

Reason for this proposed amendment: _____



Please print and insert a current copy of your local
and/or council bylaws here.



GUIDELINES FOR LOCAL PTA/PTSA STANDING RULES

All councils and local PTAs/PTSAs should have their own set of standing rules. The following guidelines for local standing rules are provided by the Utah PTA Board of Directors as general information and suggestions and should be attached to your standing rules for ongoing reference and instruction. Councils should adapt the wording to apply to them.

Standing rules are the rules your PTA/PTSA adopts to administer affairs under the provisions of your bylaws. Standing rules must conform to and may not be in conflict with your bylaws.

Standing rules are generally not adopted when a PTA/PTSA is newly organized but are developed and adopted by your general PTA/PTSA membership at a general PTA/PTSA membership meeting as needs arise.

Standing rules are detailed guidelines that contain additional information based on your bylaws. They set forth the procedures adopted to direct your PTA/PTSA and to accomplish specific PTA work. They provide continuity and serve as a guide to ensure the orderly transfer of duties from one administration to the next. They are a valuable training tool for the orientation of new board members. They may contain any traditions or specific information that pertains to your PTA/PTSA. They are not sent to or approved by the Utah PTA.

Standing rules are more flexible than bylaws. They do not contain parliamentary procedure but are adopted and amended according to the following parliamentary procedures: A standing rule(s) may be (a) adopted, as a main motion, at any general membership meeting by a majority vote without previous notice having been given; (b) suspended for the duration of any meeting (but not longer) by a majority vote; (c) amended or rescinded by a two-thirds vote at a general meeting. If notice of the proposed action is given at a previous meeting or in the call for the meeting, a standing rule may be amended or rescinded by a majority vote.

Standing rules are kept with your bylaws in your officers' procedure books and passed on to incoming officers. All board members and committee chairs should have a copy of your standing rules.

Your bylaws and standing rules need to be studied by your incoming officers as soon as they are elected and reviewed frequently for understanding and training and to ensure they are still accurate and applicable.

Your secretary shall have a copy of your standing rules available at all PTA/PTSA meetings.

General Suggestions

Each set of standing rules is unique. No two are alike because no two PTAs/PTSAs are alike.

Your standing rules may be organized in any way you desire, such as in articles and sections as in your bylaws, in numerical order as they are adopted, in topic and sub-topic groups, etc. Developing standing rules is not difficult. They may be adopted individually in a general membership meeting as the need arises.



To adopt a set of standing rules these suggestions should be followed

1. Appoint a committee of at least three experienced, knowledgeable members of your PTA/PTSA to prepare a set of standing rules.
2. Using your bylaws as a starting point, the committee should consider each provision and then formulate instructions for applying it. The minutes of board and general meetings and the experience of committee members are additional resources.
3. After the committee has prepared the standing rules, they are presented to your board for review and then to your general membership for approval by a majority vote.

Standing rules may contain as much information and detail as you want to include for the functioning of your PTA/PTSA. The more details included the easier the job will be for future board members.

Your standing rules should include any specific, detailed duties and responsibilities of your individual officers and commissioners, your executive committee, your board, and your committee chairs.

Details and descriptions that would be helpful include any consistent person, date, location, time, event, activity, assignment, tradition, and process that occurs traditionally during your PTA/PTSA year.

Detailed information about the following additional topics, and any others applicable to your PTA/PTSA, could be included in your standing rules:

- ♦ Titles and specific duties of each of your vice presidents
- ♦ Orientation of new board members
- ♦ Procedure books
- ♦ Meetings
- ♦ Standing and special committees, which could include finance, membership, public relations, newsletter, volunteers, programs, legislation, Reflections, fund-raising, Founders Day, teacher appreciation, hospitality, etc.
- ♦ Committee duties, who serves on them, and how committee members are determined
- ♦ Needs assessment
- ♦ Student involvement
- ♦ Fiscal policies and procedures, including location of bank and updating signature cards at the bank
- ♦ Nominating committee instructions
- ♦ Installation of new officers
- ♦ Information and requirements for special recognitions and awards
- ♦ Equipment your PTA/PTSA owns and where it is located
- ♦ Your council and region, including meetings and those who attend



BASIC PRINCIPLES

The basic principles of PTA are outlined in Article III of the National PTA Bylaws, as well as in local, council, and Utah PTA Bylaws. The principles govern the use of the PTA name and logo and the activities of all PTAs, whether they are National PTA, state, region, council, or local PTA.

Because all PTAs in Utah are tax-exempt under Internal Revenue Code Section 501(c)(3), it is important that all PTA members understand that failure to comply with these basic principles could result in the loss of federal tax-exempt status.

Non-commercial Principle (and Unrelated PTA Business Activities)

This principle requires that the PTA or any members in their official capacities shall not endorse a commercial entity or engage in activities not related to promoting the Purposes of the PTA. This policy does not preclude qualified sponsorship agreements.

It also means that the name “PTA,” which is a registered service mark, cannot be used in conjunction with the commercial activities of other organizations, including, but not limited to, the promotion of their goods and services.

In addition, National PTA, Utah PTA, regions, councils, and local PTAs are prohibited under federal law from engaging in substantial business activities that are unrelated to their tax-exempt purposes, which are legally defined as educational and charitable.

Non-sectarian Principle

The membership of PTA represents a diversity of cultures, ethnic backgrounds, and political and religious beliefs. PTAs must be hospitable to all—supporting no one religion over another. The Purposes of National PTA include recognition of the importance of spiritual faith to children and youth. As a private association, PTA has the right to offer inspirational messages to open or close its meetings, but such messages should be inspirational rather than sectarian.

Non-partisan Principle

PTA is nonpartisan. This does not mean that PTA is uninvolved in legislative issues. PTA has always taken a stand on issues.

In accordance with federal law, the bylaws of PTA prohibit its locals, councils, regions, states, and national association from participating or intervening in any political campaign on behalf of, or in opposition to, any candidate for public office. Further, they prohibit these bodies from devoting more than an insubstantial part of their activities to attempting to influence legislation by propaganda or otherwise.

PTAs may conduct candidates’ forums alone or as part of a coalition with other nonpartisan groups. All candidates for each public office must be invited to these forums and asked to present their views.

Neither the law nor PTA Bylaws prohibit members as individuals from exercising their civic responsibilities in personal or partisan ways, even running for office themselves. Members who choose to seek public office may not request or receive PTA endorsements at any time but may list their PTA service as part of their qualifications.



INFORMATION FOR RENEWING, AMENDING, AND SUBMITTING PTA BYLAWS

All bylaw renewals and amendments must be voted on by your general membership. A quorum must be met to hold the vote.

Your bylaws are on file with your council president and/or region director and online at UtahPTA.org/Bylaws.

- ♦ Bylaws need to be renewed once every three years.
- ♦ The president is responsible (but may delegate this responsibility) to see that the following are submitted to Utah PTA for approval: 1) All amendments as soon as adopted and 2) bylaws to be renewed.
- ♦ Your bylaws must be submitted to Utah PTA for renewal electronically at UtahPTA.org/Bylaws. Only the fill in the blank spaces in the bylaws may be amended at the local level.

Procedure For AMENDING/RENEWING Your Bylaws (also available at UtahPTA.org/Bylaws)

- ♦ About 60 days before your bylaws expire, your executive committee reads your current bylaws word for word to determine if any amendments need to be proposed.
- ♦ If your executive committee determines no amendments need to be proposed, fill in the blanks of the online form **exactly** as they are in your last approved bylaws:
 1. All spaces must be filled in, as in your last approved bylaws, unless previously amended and approved by Utah PTA. If already amended and approved by Utah PTA, put the new wording in the blank.
 2. Under Article IX: General Membership Meetings, Section 8, the number of PTA/PTSA members present at a general membership meeting to conduct business (quorum) must be at least 10, as specified in your bylaws; however, the number should be a fair representation of your membership.
- ♦ About 45 days before your bylaws expire, announce in a general membership meeting or in a newsletter that your bylaws need to be renewed and will be posted at a specified location at the school and/or online for all members to read and, if desired, make suggestions to your president for amendments to them.
 - If your executive committee or general membership determines that your bylaws need to be amended, see Article XVI in your bylaws and fill in the Amended Information at UtahPTA.org/Bylaws and print an updated and amended copy to post at the school, online, and/or in a newsletter with the amendment(s) noted. **Note:** Local amendments can only be made to the bylaws where there are “blanks” to be filled in.
- ♦ Wait at least 14 days after the bylaws are posted.
- ♦ If it is still determined that no amendments need to be proposed, at your next general membership meeting your president asks for a motion and second to the motion to reaffirm your bylaws on the current form as it has been posted. If they are reaffirmed by a two-thirds vote of the general membership present and voting, the bylaws are reaffirmed and will be submitted for approval to Utah PTA.



- ♦ If your executive committee or general membership determines that an amendment(s) to your bylaws needs to be made, in a general membership meeting at least 14 days after presenting the proposed amendment, your president asks for a motion, a second to the motion, and a vote on the amendment. To be adopted, a quorum must be present and an amendment must receive a two-thirds vote of those present and voting. At this same general membership meeting, after the amendment(s) is approved, your bylaws will then need to be reaffirmed. Your president asks for a motion and a second to the motion to reaffirm your bylaws as amended. Your general membership then votes to reaffirm your bylaws. If your bylaws are reaffirmed by a two-thirds vote of your general membership present and voting, follow the instructions in the “Submitting Your Bylaws and/or Amendments” found at UtahPTA.org/Bylaws. The approved meeting minutes will need to be submitted with the amendment(s) and the new bylaws. The minutes should reflect the quorum and the votes cast and whether they were in person or virtual votes.

Procedure For AMENDING Your Bylaws

- ♦ In a general membership meeting at least 14 days after presenting the proposed amendment, your president asks for a motion, a second to the motion, and a vote on the amendment. To be adopted, a quorum must be present and an amendment must receive a two-thirds vote of those members present and voting.

Submitting Your Bylaws And/Or Amendments

- ♦ Bylaws submission is done online at UtahPTA.org/Bylaws
- ♦ You will submit a digital copy of your renewed/amended bylaws with a copy of the approved meeting minutes of the general membership meeting where the bylaws were (amended and) reaffirmed. These meeting minutes shall reflect the minimum quorum requirements were met and the votes cast.
- ♦ Your bylaws are not approved until you receive notice of an official stamped copy. Copies will be kept digitally at UtahPTA.org/Bylaws and can be printed by local leaders. An account and log in are required to view/print the bylaws.
- ♦ Your renewal date will be three years from the time of approval.

Your current bylaws should be in your president’s and secretary’s procedure books and passed on to your incoming officers.



GLOSSARY OF PTA TERMS

- Amend (Amendment)**—To change the wording of the bylaws or a motion by inserting and/or striking out.
- Annual Financial Reconciliation (AFR)**—An at-least annual official examination, verification, and report of the financial accounts and records of the treasurer. The Annual Financial Reconciliation (AFR) report is presented to the general membership for adoption at the first general membership meeting of the school year.
- Annual Meeting**—The last general membership meeting of the school year, at which annual reports are received and other business designated in the bylaws is conducted.
- Annual Report**—A resume of your annual PTA activities, programs/projects and finances prepared by the president (or a designated representative).
- Audit**—see annual financial reconciliation.
- Ballot**—The list of nominees on which a person marks his vote.
- Basic Principles**—Established procedures of National PTA, as stated in the bylaws, which summarize the principles of conduct all PTA groups, for their protection, are required to follow in carrying out the purposes and work of PTA.
- Board**—The group of members (officers, commissioners, and appointees) authorized to act for your PTA between its meetings, with specified limitations delineated in the bylaws.
- Budget**—A plan of operations based on an annual, itemized estimate of expected income, expenses, and disbursements approved by your general membership prior to October 1.
- Business**—Important matters to be brought before your PTA for action.
- Bylaws**—A document adopted by vote of your PTA members, which contains the basic rules for governing and orderly conduct of business under which your PTA operates.
- Chair**—The presiding officer, who serves as a means through which your PTA expresses its will. Authority is vested in the office, not the person. Because he acts for the group, not for himself, he must be impartial. He refers to himself as “the Chair,” avoiding the use of the pronoun “I.”
- Charter**—A document issued by Utah PTA authorizing a PTA/PTSA to function as a local PTA of National PTA and Utah PTA.
- Commission**—A specific group led by a commissioner which develops and implements programs and projects within related areas of concern.
- Commissioner**—A Utah PTA Board member who chairs a commission responsible for specific areas of concern; directs implementation of programs, projects, and legislative action; and represents Utah PTA to other organizations as directed by the president.
- Committee**—A group elected or appointed to consider, investigate, perform a service or function, or act upon a particular area of concern.
- Constituent Association**—In a national association such as National PTA, local and state associations are constituent associations of the parent body, National PTA, as provided for in the National PTA Bylaws.
- Convention**—The annual Utah PTA event during which time elections are held, bylaws amendments and proposed resolutions are voted on, awards are presented, workshops are offered, and connections are encouraged through networking with members and exhibitors.
- Council**—A group of local PTAs/PTSAs organized under the authority of the Utah PTA for the purpose of conference, leadership training, and coordination of efforts.
- Disbursement**—The paying out of funds.
- Executive Committee**—The elected officers of your PTA/PTSA to whom power and authority are delegated between meetings of the board as prescribed in the bylaws.
- Ex Officio**—By virtue or because of office. When provided in the bylaws, certain offices automatically confer membership on certain committees. That officer may attend committee meetings and has all the privileges of membership, including making motions, debating, and voting. He is counted in the quorum if he has the right to vote and another person may not take his place in the ex officio role.
- Field Service**—Training provided by Utah PTA, which should be requested by the region director at least 30 days in advance.
- General Membership Meeting**—A regular meeting of your PTA which includes your PTA members, the general public, and invited guests.
- Installation**—A meeting or ceremony at which PTA officers are inducted (not sworn in) into office.
- Interim Meetings**—Monthly meetings between Utah legislative sessions of legislative study committees, which study and discuss issues and at which citizen input is encouraged.
- Local Unit**—A local Parent-Teacher (PTA) or Parent-Teacher-Student (PTSA) Association.
- Majority Vote**—One more than half of the votes cast.
- Meeting**—A single official gathering of members.
- Member**—A person who has joined your PTA/PTSA and thus is automatically a member of both National PTA and Utah PTA and has all the rights of membership, provided he continues to meet the membership requirements as stated in your bylaws.
- Minutes**—The official record of all business and proceedings transacted in a meeting.
- National Constituent Association Advisory Council**—The body composed of presidents of each state constituent association. The Council’s responsibilities include assisting the board in setting the strategic direction of National PTA and participating in leadership development.
- National PTA**—National Congress of Parents and Teachers, Inc., composed of all the Parent Teacher Associations of the 50 states, the District of Columbia, and the European, Pacific, Virgin Islands, and Puerto Rico Congresses.
- National PTA Convention**—The annual National PTA meeting at which representatives from local PTAs/PTSAs elect national



officers, amend bylaws, adopt resolutions, and receive training.

National PTA Legislative Program—The statement of the areas of legislation that are agreed to be within the scope of National PTA's work. It is adopted by the vote of at least 31 state PTAs.

National PTA Resource Book—A reference manual with all basic PTA information, including officers' duties, bylaws, meetings, parliamentary procedure, program planning, policies, guiding principles, and committee work.

Needs Assessment—A survey or study to determine the areas of concern within your PTA or community, so that programs can be established and efforts can be made to solve the problems found to be most pressing, usually followed by a plan of action, implementation, and evaluation.

Newsletter—Your PTA publication for the purpose of communicating with your members, often issued in cooperation with the principal.

Our Children—The official, award-winning National PTA magazine.

President-elect—The person elected to succeed to the office of president when the term of the current president ends.

Procedure Book—A loose-leaf binder in which instructions for carrying on the work of an office or chairmanship, a record of work done, and other helpful material are compiled. It should be passed on promptly to one's successor to maintain continuity and efficiency in your PTA work.

PTA Program—A plan for the year's action, including study groups and general meetings, adopted by your PTA/PTSA to meet its needs and those of the children it serves and of each member.

PTSA—A local Parent-Teacher-Student Association. To be a PTSA requires a bylaws vote of your general membership.

Purposes (formerly known as Objects)—The Purposes of National PTA and Utah PTA are generally thought of as the reasons National PTA and Utah PTA exist.

Quorum—The minimum number of members required in the bylaws to be present at a meeting to validly transact business.

Region—All of the local PTAs/PTSAs and councils within a geographical division of Utah. Each region is designated by a number.

Region Director—Title of the first officer of the region. One is elected by each region. The region directors are members of the Utah PTA Board of Directors.

Regular Meeting—A meeting held as prescribed in the bylaws.

Resolution—A motion which, because of its length or importance, is presented in writing for vote of the PTA, suggesting a position or action to be taken by the PTA and stating reasons for taking the action.

School-Based—Organized under the umbrella of a school.

Special Meeting—A meeting held for a specific purpose at a time different from that of a regular meeting. Only the business identified in the notice given for the meeting may be conducted.

Standing Committee—A permanent committee responsible to the Board of Directors that performs a continuing function.

Standing Rules—Written rules and procedures adopted by a majority vote of your general membership which further define your bylaws, may not conflict with your bylaws, and relate the details of administration and activity of your PTA.

Two-Thirds Vote—Two-thirds of the legal votes cast, which is

necessary for any proposal that deprives a member of his rights in any way.

Utah PTA Leadership Convention—The annual Utah PTA meeting at which representatives from local PTAs/PTSAs elect state officers, amend bylaws, adopt resolutions, and receive training.

Volunteers—Workers at every PTA level who serve PTA, and through it the children and youth of the nation, without financial reward.

Weighted Pupil Unit (WPU)—The amount of money spent by the state for each student in the regular school program.





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FIDUCIARY RESPONSIBILITIES GUIDE

For Board Members

Serving on the Board of Directors of a non-profit organization is a significant commitment. It entails important responsibilities. Some of these responsibilities are imposed by state law; others are the result of years of court decisions which have imposed various “fiduciary duties” on directors.

fi-du-ci-ar-y

n. a person who holds something in trust for another; a trustee

Fiduciary Duties

The ultimate authority for managing the affairs of the association is vested in the Board of Directors. Because the law grants directors such authority, the law also imposes on directors an obligation to act in the best interests of the association. The law requires directors to act:

1. In good faith
2. With the care an ordinary prudent person in a like position would exercise under similar circumstances
3. In a manner the director reasonably believes to be in the best interests of the organization

Duty of Care

The duty of care contains several elements. Its violation is the most frequent source of liability for directors.

1. Attendance

- ♦ Directors must attend board meetings. Courts will have no sympathy for directors who claim as a defense to any legal action that they did not know of a particular issue or did not participate in a particular action because of failure to attend board meetings.
- ♦ Directors who do not attend meetings are nevertheless bound by actions taken at those meetings and will be held responsible if any such actions are deemed negligent.
- ♦ The act of failing to attend board meetings may itself be deemed to be negligent behavior. Board meetings should be missed only for unavoidable emergencies. A board member who repeatedly misses meetings should consider resignation.

2. Delegation vs. Abdication

- ♦ While the Board of Directors makes the important policy decisions that guide and determine the activities of the association, it must rely on others to carry out the decisions. Such delegation is necessary and legal.
- ♦ Boards also delegate their duties to committees and other outside parties, such as accountants and attorneys.
- ♦ A board must monitor those to whom it has delegated authority to make sure such persons are acting responsibly.
- ♦ Delegation does not relieve a board of liability.



- 3. Information Flow.** The essence of the duty of care is the duty to be informed. Courts will not tolerate directors who are not sufficiently informed about the activities of their association. On the other hand, courts will not generally second-guess decisions of boards based on thorough research and business judgment.
- A. Directors must assure themselves that information and reporting systems exist in the association that are reasonably designed to provide to senior management and to the board itself timely, accurate information, sufficient to allow management and the board to reach an informed judgment.
 - B. A board's decision not only must be informed, but also must be reasoned and deliberate.
 - Decisions should be made by the board deliberately and without haste or pressure.
 - The board should be as thoroughly and completely prepared in its decision-making process as possible. Materials concerning decisions should be sent out for review in advance; and the board should read and understand those materials.
 - The board members should be actively involved in deliberation in the board meeting. Written materials should be read, digested, and commented on by board members.
 - Written records of board preparation and deliberation should be maintained.
 - In the case of any major transaction, the board should receive the basic documents and analysis by experts in connection with the transaction.
 - Independent evaluations and appraisals, as necessary, should be prepared by experts and presented to the board.

Duty of Loyalty

By assuming office, the director commits allegiance to the association and acknowledges that the best interests of the association must prevail over any individual interest of the director, the director's employer, and the director's family, and associates. Actions and decisions of the director, while he or she is serving as a director, must promote the association's purpose and well-being rather than any private interest.

1. The duty of loyalty is transgressed when a director uses his or her office to promote, advance, or effectuate a transaction between the association and such person or his or relatives or associates, and that transaction is not substantively fair to the association.
2. Full disclosure and refraining from discussion and voting are required when a director may be influenced by a private interest.

Duty of Obedience

Directors have a duty to follow the association's global governing documents (such as Articles of Incorporation and bylaws) to carry out the association's mission and to ensure that funds are used for lawful purposes. Directors must also comply with state and federal laws relating to the association.



Financial Controls

One of the board's responsibilities is to oversee the association's financial affairs, including making sure that the association has adequate internal accounting systems and controls.

1. The board should be responsible for approving its association's annual budget.
2. Board members should expect the treasurer to produce timely and adequate income and expense statements, balance sheets, and budget status reports.
3. If appropriate, the board should employ independent accounting professionals and review the annual report of such professionals.

Safeguarding Assets

The board should oversee the effective use of the resources of the association. Internal policies should be adopted and large transactions reviewed to ensure that the association's assets are not misapplied or wasted.

1. The board is not an insurer of the adequate performance of the association's funds. There is no implied guarantee by a board that its investment decisions will be profitable. The decisions must, however, be reasonable and defensible.
2. Directors are not expected or legally required to be experts in investment matters. Retention and reliance on advisors with good reputations is considered the exercise of prudence.
3. Intangible assets, such as the association's goodwill, must also be safeguarded by the board. The board should evaluate the association's activities and proposed activities with the overriding goal of protecting the association's brand.

INFORMATION PROVIDED BY:

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FINANCIAL TIME LINE

All End-of-Year and Beginning-of-Year documents should be submitted via MemberHub under Compliance Submissions. Local units needing assistance with this procedure should work with the council or region treasurer for document submission.

Each local/council/region unit must keep copies of all reports and forms submitted for good record-keeping.

The most current/digital version of all forms are available on the Utah PTA website: utahpta.org.

July 1	Fiscal year begins/change over PTA checking account signers	
By the 25th	Membership dues (remit monthly)	National and state portions submit to Utah PTA via ACH through MemberHub or mailed with a check and remittance form
	Council membership dues (if applicable)	Council portions submit to council PTA via check and remittance form (MemberHub ACH not available)
August 1	End-of-Year Documents (previous fiscal year) - Year-End Financial Statement	Local PTA submit via MemberHub or to council/region
	Annual Financial Reconciliation report (AFR)	Local PTA submit via MemberHub or to council/region
	E-filed/Accepted IRS Form 990	Local PTA submit via MemberHub or to council/region
	Sales Tax Refund Request	Local PTA submit via utahpta.org/treasurer
August 15	Council review of Local Unit End-of-Year Documents	Council submit to region via MemberHub approval
	Council review of Local PTA Sales Tax Refund Requests	Council submit to region via utahpta.org (accept/advance)
September 1	Region review of Council/Local End-of-Year Documents	Region submit to Utah PTA via MemberHub approval
	Region review of Local/Council PTA Sales Tax Refund Requests	Region submit to region via utahpta.org (accept/advance)
September 25	Membership dues - early bird remittance deadline	
October 1	Beginning-of-Year Documents - Budget	Local PTA submit via MemberHub or to council/region
	Budget approval minutes	Local PTA submit via MemberHub or to council/region
	Signed Ethics Conflict of Interest Form	Local PTA submit via MemberHub or to council/region
	Signed Basic Fiscal Management Form	Local PTA submit via MemberHub or to council/region
	Proof of insurance	Local PTA submit via MemberHub or to council/region



FINANCIAL TIME LINE

October 15	Council review of Local Unit Beginning-of-Year Documents	Council submit to region via MemberHub approval
	PTA board list (current year)	Local PTA submit via MemberHub or to council/region
November 1	Region review of Council/Local Beginning-of-Year Documents	Region submit to Utah PTA via MemberHub approval
	Local, council, and region report #1 due	Online via Utah PTA website
December 1	Membership dues - remittance deadline to participate in Utah PTA programs	
February 1	Arts Education Fund Grant deadline	Online via Utah PTA website
	Local, council, and region report #2 due	Online via Utah PTA website
May 1	PTA board list (next year's incoming)	Local PTA submit via MemberHub or to council/region
June 1	Local, council, and region report #3 due	Online via Utah PTA website
June 30	Fiscal year ends and financial books must be closed.	
	Begin preparation of End-of-Year Documents: Year-End Financial Statement, Annual Financial Reconciliation report (AFR), E-filed/Approved IRS Form 990, and Sales Tax Refund Request.	



FINANCIAL FAQs

The most up-to-date financial information and forms for PTAs are found at UtahPTA.org/Treasurer

What is a PTA in Good Standing?

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

- ♦ Adhering to the purposes and basic policies of PTA.
- ♦ Having an EIN (Employer Identification Number) from the IRS on file with Utah PTA.
- ♦ Submitting to Utah PTA the names and contact information of current officers.
- ♦ Having current bylaws, renewed every three years.
- ♦ Remitting national and state portions of membership dues to Utah PTA by dates designated. The current procedure requires local PTAs to make monthly remittances, by the 25th of each month.
- ♦ Submitting year-end financial statement, annual financial reconciliation, board list, and approved budget through MemberHub or council/region treasurer.
- ♦ Submitting appropriate IRS filing by September 1.

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

Is Our Local PTA Tax Exempt?

Utah PTA has secured a 501(c)(3) exemption ruling from the IRS, recognizing it as a public charity. Each local PTA in Utah in good standing is covered under Utah PTA’s group exemption. (The IRS group exemption number (GEN) is 7212.)

One major advantage of exempt status under section 501(c)(3) is that contributions to Utah PTA and its subordinate units may be treated as charitable contributions by donors in calculating their federal income taxes. If a potential donor needs verification of a local PTA’s exempt status, the local PTA should contact the Utah PTA office, Kids@UtahPTA.org, who will provide a letter about the group ruling. Another significant advantage of exempt status is that most PTA fundraising activities are exempt from federal income taxes.

Utah PTA also has an exemption from sales tax from the Utah State Tax Commission. State law requires every PTA to pay sales tax on purchases under \$1000 and then request a refund. Utah PTA has established a procedure for applying for a refund; instructions and forms are located in the Treasurer Handbook and at UtahPTA.org/Treasurer. The Utah PTA tax-exempt number is 12510060-002-STC. For purchases over \$1000, vendors may request a tax exemption certificate; PTAs can obtain that certificate by calling the Utah PTA office or emailing Kids@UtahPTA.org.



What is an IRS Determination or 501(c)(3) Letter?

The IRS issues a “determination letter” to organizations that have qualified for tax-exempt status in good standing. Because Utah PTA, as a central organization, determines which PTAs are included as subordinates under its group exemption ruling, anyone seeking to verify that a PTA in Utah is tax-exempt should contact the Utah PTA Treasurer. Utah PTA can provide a letter about the group ruling and a copy of its determination letter from the IRS for potential donors, sponsors, or grantors. According to IRS Publication 4573, “*donors may rely upon central organization verification with respect to deductibility of contributions to subordinates covered in a section 501(c)(3) group exemption ruling.*”

What is a “Form W-9”?

Someone who is giving money to your PTA may ask you to complete “Form W-9,” entitled *Request for Taxpayer Identification Number and Certification*. The form is used simply to verify the PTA name, address, and EIN.

- ♦ On line 1: You will put **PTA Utah Congress, Inc.**
- ♦ On line 2: You will put your PTA name
- ♦ On line 3: You will check “C Corporation”
- ♦ On line 4: You will put “5”
- ♦ On lines 5 and 6: You will put your school address
- ♦ In Part I: You will put your PTA’s EIN number (**-*****)
- ♦ The president or the treasurer can sign and date the form

What are the Requirements for Acknowledging Donors or Sponsors?

IRS Publication 1771, *Charitable Contributions – Substantiation and Disclosure Requirements*, explains the federal tax law for charities (like PTAs) that receive tax-deductible contributions. The publication can be downloaded from the IRS website ([IRS.gov](https://www.irs.gov)). Information about how the law applies to PTAs can be found in the *Treasurer Handbook*.

What Tax Filings Must a PTA Do?

All PTAs are required to file a tax return 990 with the IRS. Most will file a 990N, electronic notice (e-postcard) for tax exempt organizations not required to file Form 990 or 990EZ. Please refer to Utah PTA Treasurer Handbook or the [Utah PTA website](#) for current instructions.



How Do We Go About Creating a Budget?

Budgets

- ♦ Help each board member determine what funds will be necessary to meet the goals you set together based on your needs assessment.
- ♦ Be realistic—use budgets from previous years as a guideline.
- ♦ A copy of your budget and the minutes of the meeting where the budget was approved must be submitted through MemberHub or to your council president/region director by September 15.
- ♦ Include funds for leadership training (conferences and Utah PTA conventions). Training is an important and long-lasting use of PTA funds. It will benefit your school for years to come, as well as your local board and your general membership. It is definitely a legitimate PTA expense.

The budget is your financial road map for the year. The budgeting process should be taken seriously. However, it does not need to be complicated.

Sources of information to create this year's budget include last year's financial records, a needs assessment, and input from each commissioner and/or chairperson.

The treasurer is the chair of the Budget Committee. The president is a member of the Budget Committee, as are other elected officers or general members as either elected or appointed by the president. The Budget Committee will develop a budget and then propose it to the entire Executive Committee for their approval. Once the proposed budget is approved by the Executive Committee, it **must** be approved by a majority vote of a quorum of the membership at the first general membership meeting of the year. This could be at a Back-to-School night or at a board meeting where the general membership has also been invited. A copy of the approved budget and the minutes of the general membership meeting where it was approved must be submitted through MemberHub or council/region treasurer by September 15.

Additional information about the budgeting process, including making motions and amending an approved budget, can be found on the treasurer page of the website at UtahPTA.org/Treasurer.

Where Can I Find a List of What Our PTA Can or Cannot Spend Money On?

There is no published list from either National PTA or the IRS of acceptable PTA expenditures. PTA's Mission and its tax-exempt status should guide your decisions. All expenditures in the PTA budget must support the Mission of PTA. If there is a questionable expenditure, a good rule of thumb is to authorize the expenditure only if you could defend it to the IRS in case of an audit.



Utah PTA takes no official position on the appropriateness of specific expenditures of its affiliated local PTAs, except as follows:

- ♦ All activities should be in accordance with the Purposes and Mission of PTA, as outlined in the bylaws and as required by our status with the IRS as a 501(c)(3) public charity.
- ♦ A needs assessment should direct the work of the local PTA and its annual goals and objectives.
- ♦ All expenditures must be made with the budget categories and amounts approved by the general membership.
- ♦ Local PTAs should comply with the guidelines of the school district in which they operate.

How Do We Get an Annual Financial Reconciliation (AFR) of Our PTA Done?

- ♦ An Annual Financial Reconciliation (AFR) must be conducted at the end of each fiscal year, and in the event of a vacancy in the office of treasurer, before the new treasurer takes office.
- ♦ An AFR may be performed by an auditor or AFR Committee of at least three members, appointed by the Executive Committee.
- ♦ The AFR report must be adopted by the general membership at the first general membership meeting of the new fiscal year.
- ♦ A copy of the AFR report must be submitted through MemberHub or council/region treasurer by August 1.

An annual AFR of the PTA's books is required by the bylaws (Article VII, Section 6). The AFR is to be performed either by an AFR Committee of at least three members of the PTA or by an auditor. An AFR Committee would perform an "internal AFR," following Utah PTA's recommended AFR procedure checklist. An outside auditor is **not** required to perform an AFR in accordance with generally accepted reconciliation standards. "Agreed-upon procedures" (based on the recommended internal AFR procedures) are sufficient to fulfill the requirement. An auditor who is a member of the PTA could perform an "internal AFR" such as would be performed by an AFR Committee. Additional information about PTA AFR can be found in the Treasurer Handbook and on the treasurer page of the website at UtahPTA.org/Treasurer.

What is a Year-End Financial Statement?

- ♦ A year-end financial statement must be prepared by the treasurer, giving a full accounting of all income and expenses for the year, including beginning and ending balances.
- ♦ The statement should include all accounts in the PTA name.
- ♦ The Year-End Financial Statement must be submitted with the treasurer's records for reconciliation.
- ♦ A copy of the year-end report must be submitted through MemberHub or to council/region treasurer by August 1.



FUNDRAISING GUIDELINES

- ♦ PTA is a child advocacy association—not a fundraising association.
- ♦ Remember—PTA does not exist to raise funds—PTA raises funds to exist!
- ♦ Decide early what funds will be needed to accomplish the programs and activities identified in your needs assessment.
- ♦ Attend Utah PTA Leadership Convention in May and visit the exhibits there for various fundraising ideas.
- ♦ Be familiar with your school district policy on fundraising.
- ♦ Children should not be exploited (i.e., used in door-to-door fundraising activities).
- ♦ Do not use high-pressure selling or competitive incentives.
- ♦ The appointment of a fundraising chair will help ease your responsibilities.
- ♦ Read National PTA's fundraising section at [Local Leader Kit](#) for guidelines and responsibilities concerning fundraising.
- ♦ Work closely with your school principal in planning fundraising activities, remembering that PTA is not a fundraising organization.
- ♦ PTA must not hold a joint fundraiser with the school. This is commingling of funds, which could jeopardize the association's 501(c)3 tax exempt status.

FINANCIAL FORMS

Financial forms can be found in the Treasurer Handbook, the Membership Handbook, or online at: UtahPTA.org/Financial-Forms-Reports or UtahPTA.org/Treasurers-Tools.

- ♦ Check Request form
- ♦ Funds Received form
- ♦ Cash Box Instructions
- ♦ Beginning Cash Box Balance
- ♦ Money Counting Sheet
- ♦ Bank Reconciliation form
- ♦ Monthly Treasurers Report
- ♦ In-Kind Donation form
- ♦ Sample Local Donation Request Letter
- ♦ Sample Local Thank You Letter
- ♦ Financial Time Line - for Non-MemberHub User
- ♦ Financial Time Line - for MemberHub Users
- ♦ State and National Dues Remittance form
- ♦ Council Dues Remittance form
- ♦ Sales Tax Refund Request instructions
- ♦ Sales Tax Refund Request - Unit form
- ♦ Sales Tax Refund Request - Council Compilation form
- ♦ Sales Text Refund Request
- ♦ Year-End Financial Statement
- ♦ Council: Region Summary of Year-End Financial Reports
- ♦ Council: Region Beginning Year Reports



UTAH PTA BASIC FISCAL MANAGEMENT PROCEDURES

Information

PTA Funds

PTA funds are used to help fulfill the three Utah PTA goals:

- ♦ Advocate for children
- ♦ Involve parents in the schools
- ♦ Develop leadership and parenting skills

Do You Have These Basic Controls In Place?

- The treasurer maintains custody of the checkbook at all times.
- Supporting documentation is required for every disbursement made.
- Payments are made from original invoices whenever feasible.
- Checks are issued in number sequence order.
- All checks have two signatures, the treasurer and the president, except in emergencies, when any two of the following may sign: president, president-elect, secretary, or treasurer (None of these officers may be related by blood or marriage or reside in the same household.);
- There are no blank checks with a signature(s)!
- Checks are never made out to “cash.”
- Detailed supporting documentation is maintained for every deposit made.
- Three people are present for all counting of cash (membership drive, book fair, fundraiser, etc.).
- All money received is deposited the same day, using the bank’s night depository for events concluded after banking hours.
- The monthly bank statement should be mailed to the PTA at the school address. When the bank statement arrives, a designated Board member (not the President, Treasurer or Secretary) should immediately review it, initial it and then give it to the President to review and initial. Then it will be given to the Treasurer to reconcile.
- Bank statements are reconciled to check registers in a timely manner.
- There are no ATM, debit cards, or credit cards in connection with PTA accounts.
- The treasurer prepares and presents a treasurer’s report at each general membership meeting and at executive committee and board meetings as deemed appropriate.

PTAs must have money to operate. They do not exist to raise money but rather raise money to exist. Without realizing the problems inherent in the management of an organization’s finances, some PTA members or officers have found themselves in difficult situations. These situations can be avoided by following the above-mentioned basic fiscal management procedures.



Each PTA should recognize that the treasurer is the legally responsible, authorized custodian, elected by the members to have charge of the funds of the PTA unit. He or she should receive and disburse all moneys as prescribed in the local bylaws or as authorized by action of the PTA's Board of Directors. He or she should keep a full account of receipts and expenditures.

It is essential that the president, who bears full responsibility for the total affairs of the PTA unit, work closely with the treasurer at all times and have a complete understanding of all financial matters. All persons signing on a PTA checking account are liable for the use or misuse of those funds.

Other officers or members may be required to occasionally handle PTA money (for example, dues from membership enrollment or revenue from a fundraising project). In these cases, great care should be taken in counting and recording moneys received in accordance with established procedures. Money thus collected should be turned over to the treasurer without delay, and the treasurer should bank that money immediately. PTA money should never be stored in the school or in the homes of PTA officers or members. If large sums are handled by the treasurer, it is advisable to bond him or her as a protection both to the treasurer and to the PTA.

If any volunteer involved in a Local/Council PTA has been included in/or part of fraudulent charges or mishandling of funds, he or she will not be allowed to serve in any position on your Board that deals with handling money.

Local PTAs should maintain one checking account with one checkbook. Two signatures should be required for all checks. None of those authorized to sign checks may be related by blood or marriage nor reside in the same household. The checking account should be maintained in a bank approved by the Board of Directors. PTA monies should not be deposited in the personal account of any officer nor commingled with school accounts.

It is an unfortunate fact that non-profit organizations are susceptible to fraud. PTAs are run by volunteers who want to trust one another, but the trusting environment of the PTA is exactly what a dishonest individual exploits.

PTA cannot reimburse anyone who has purchased PTA supplies with government issued or non-personal funds. It is against the law.

One of the most important things that you can do for the well-being of your PTA is to implement and follow a system of internal controls. Good internal controls are reasonable rules that are consistently applied. They guard against both errors—unintentional mistakes—and irregularities—deliberate attempts to misuse or misappropriate the assets of the PTA.

Guidelines to Follow When Money Has Been Mismanaged or Embezzled

1. When mismanagement or embezzlement of funds is suspected, the PTA line of communication should be followed in informing and receiving direction and assistance. The local PTA should contact the council (region if no council). The council in turn will contact the region, and the region will make contact with the Utah PTA treasurer. If for some reason assistance cannot be obtained through the line of communication, contact the Utah PTA treasurer directly.
2. When any wrongdoing is suspected, the person involved should have a meeting with the local executive committee and make an explanation of what has happened. If the meeting is unsatisfactory for either party,



the decision may be appealed up the line of communication. If the issue involves a president or president-elect, council/region leadership must facilitate the meeting. Once wrongdoing is suspected, meetings should take place in a timely manner. If an outside investigation is warranted, authorities may become involved.

3. The PTA officers have a responsibility to the membership for all PTA monies. The PTA also has the responsibility to be a professional organization. The PTA officers are highly encouraged to try to protect the person's reputation by using discretion in what is said and done, especially in the preliminary stages of an investigation. It is not responsible, however, to disregard the incident.
4. If the results of the meeting warrant further action, the executive committee should request that an AFR be done, if appropriate, and documentation gathered. They should also carefully consider whether it might be appropriate to file a police report and/or to close the bank account. If an outside investigation is warranted, the police will become involved.
5. Theft of money is breaking the law and should be handled as a serious offense. Embezzlement is the same as ordinary theft. The charges are criminal and, if deemed appropriate, are filed at the police department. Depending on the amount it could be a misdemeanor up to a felony.
6. According to the local PTA bylaws (Article VI, Section 7b), a person who fails to perform the duties of his office should be removed from office. It is the responsibility of the local executive committee to meet and declare the office or position vacant. All resignations must be made in writing to the president. The local executive committee is to elect a replacement to fill any vacancy, except the President-elect (local PTA bylaws Article 6, section 7a).



UTAH PTA BASIC FISCAL MANAGEMENT PROCEDURES

Signature Page

We have read, understand, and agree to abide by the Basic PTA Fiscal Management Procedures.

Region _____ Council (if applicable) _____

Local PTA _____

President _____
(Print Name) (Signature) (Date)

Treasurer _____
(Print Name) (Signature) (Date)

All other elected PTA officers' signatures:

(Print Name) (Position) (Signature) (Date)

(Print Name) (Position) (Signature) (Date)

(Print Name) (Position) (Signature) (Date)

(Print Name) (Position) (Signature) (Date)

(Print Name) (Position) (Signature) (Date)

(Print Name) (Position) (Signature) (Date)

(Print Name) (Position) (Signature) (Date)

Membership chair's signature:

(Print Name) (Signature) (Date)

Fundraising chairs' signatures:

(Print Name) (Signature) (Date)

(Print Name) (Signature) (Date)

Each local PTA shall obtain the appropriate signatures on this form, make a copy of the form for all signers, and submit the signed page through MemberHub by September 1.

When submitting, only send this page - You do not need to include the information pages.



UTAH PTA ETHICS/ CONFLICT OF INTEREST POLICY

Information

Members of the Board of Directors (board members) of this PTA/PTSA serve in a fiduciary capacity and owe a duty of care, a duty of obedience, and a duty of loyalty to this PTA/PTSA. Board members shall conduct themselves with integrity and honesty and act in the best interests of this PTA /PTSA. Disclosure by a board member of any potential or actual conflict of interest is required by the standard of good faith and for the benefit of the PTA and protection of each individual.

In consideration of our local PTA/PTSA affiliation with the Utah Congress of Parents and Teachers (Utah PTA), for the protection of its integrity and its 501(c)(3) status and for our protection, we, the undersigned officers, individually, during our term of office, shall:

1. Abide by and represent our PTA/PTSA bylaws, Utah PTA policies, positions, procedures, and National PTA Purposes and Mission statement.
2. Discharge the duties and responsibilities of our individual offices with fidelity, integrity, and honesty and declare any and all personal and/or extended family conflicts of interest when PTA issues, decisions, and funds are involved.
3. Not misuse the PTA's federal tax-exempt status or exemption from sales tax for personal or unauthorized purposes nor disburse funds for any purpose other than authorized, budgeted PTA programs, projects, and activities.
4. Refrain from making slanderous or defamatory comments regarding any individual or organization.
 - ♦ Refrain from having disruptive arguments around children and on school property.
5. Follow Utah PTA and school district guidelines for fundraising.
6. Abide by the following conflict of interest policy:
 - ♦ Board members and/or their families shall not use their relation to this PTA/PTSA for financial, professional, business, employment, personal, and/or political gain.
 - ♦ A conflict of interest exists when a board member would have to participate in the deliberation or decision of any issue of this PTA/PTSA while, at the same time, the board member and/or his/her extended family has financial, professional, business, employment, personal, and/or political interests outside the PTA that could predispose or bias the board member to a particular view, goal, or decision.
 - ♦ Board members shall declare to the officers of this PTA/PTSA conflicts of interest (stating the nature of the conflict and pertinent information as appropriate) between their duties of this PTA/PTSA and their and/or their extended families' financial, professional, business, employment, personal, and/or political interests.
 - ♦ When a conflict of interest is declared, the board member shall not use his personal influence or position to affect the outcome of the vote and shall leave the room during deliberations and the vote.
 - ♦ The minutes of the meeting shall reflect that a conflict of interest was declared.
 - ♦ Board members shall not:
 - Use PTA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.



- Directly or indirectly use their current PTA position, the PTA name, or the association for or against any specific candidate for elected office, which is contrary to federal tax laws and the guidelines and policies of the PTA. (Past PTA experience may be listed in any brochures.)
 - ♦ Be in violation of, nor be in the act of, violating any state or federal laws and/or court orders, including, but not limited to misdemeanors, felonies (e.g., trespass, possession or use of any illegal substances, public intoxication) and/or protective/restraining orders, while conducting any PTA/PTSA business and/or while participating in any PTA/PTSA sponsored activity or event, including, but not limited to activities for students, PTA/PTSA board meetings and/or conventions, nor while transporting themselves or others to any PTA/PTSA sponsored activity or event.
7. PTA does not recognize co-elected positions. Refer to PTA/PTSA bylaws information in President Handbook (refer to officer's section bylaws).

Guidelines to Follow When There Has Been Mismanagement or a Conflict of Interest

1. When mismanagement and/or conflict of interest is suspected, the following PTA lines of communication of informing, receiving direction, and assistance should be followed: The local PTA should contact the council. The council in turn should contact the region, and the region will contact Utah PTA. If for some reason assistance cannot be obtained through this line of communication, contact Utah PTA directly.
2. When any wrongdoing is suspected, those involved should have a meeting with the local Executive Committee with notification given to the council/region representative. If the outcome of the meeting is unsatisfactory for either party, the decision may be appealed up the lines of communication. If the issue involves a president or president-elect, council/region leadership must facilitate the meeting. Once wrongdoing is suspected, a meeting should take place in a timely manner. If an outside investigation is warranted, authorities may become involved.
3. The PTA officers and/or board members have a responsibility to the membership and to act in a professional manner. Refer to local PTA bylaws (Article VI, Section 1), "The officers of this PTA/PTSA shall abide by, promote, and represent the Purposes, Mission, bylaws, policies, and procedures of PTA." The PTA officers and/or board members should protect the person's reputation by using discretion in what is said and done, especially in the preliminary stages of an investigation. However, it is not acceptable to disregard the incident.
4. Refer to local PTA bylaws (Article VI, Sections 7b, c and d):
 - 7b. "If an officer or appointee fails... to perform the duties of his office the members of the Executive Committee shall meet and declare the office or position vacant."
 - 7c. "All resignations must be made in writing to the president." If the office of president is declared vacant, the letter of resignation must be made to the council/region/Utah PTA.
 - 7d. 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 general membership 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."
5. When necessary, the region director and/or Utah PTA may declare the office or position vacant.



UTAH PTA ETHICS/ CONFLICT OF INTEREST POLICY

Signature Page

Region _____ Council (If applicable) _____

Local PTA/PTSA _____ President _____

We, the undersigned officers, commissioners, and board members have read and agree to abide by this policy and understand that the failure to adhere to the above guidelines may result in the termination of the undersigned as officers, commissioners, and board members will require the immediate return of all funds belonging to this PTA/PTSA in the possession of the undersigned together with all PTA documents and materials.

_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>
_____	_____	_____	_____
<i>(Print Name)</i>	<i>(Position)</i>	<i>(Signature)</i>	<i>(Date)</i>

Each local PTA shall obtain the appropriate signatures on this form, make a copy of the form for all signers, and submit the signature page through MemberHub by August 1.

When submitting, only send this page - you do not need to include the information pages.





REPORT OF TRAININGS ATTENDED

Due September 15

Local Bylaws Article IV, Section 1 ... A Local PTA/PTSA in good standing is one which...

- f. Has at least two (2) officers attend one PTA leadership training session annually;

TRAINING OPPORTUNITIES INCLUDE:

Utah PTA Leadership Convention | National PTA Convention | Region training
utahpta.org/university/archive | pta.org/home/run-your-pta/elearning

Year: 20____ - 20____

Unit Name: _____

Council Name (if applicable): _____

Region: _____

Two training sessions required per year. Others are optional.

	NAME	POSITION	NAME OF TRAINING	LOCATION	DATE
1					
2					
3					
4					
5					
6					
7					
8					



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THE PRESIDENT'S ROLE AS A PTA ADVOCATE

The Mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children. As a PTA leader, it is your role to advocate for your child—and every child in your school and community.

According to National PTA, “PTA advocacy means supporting and speaking up for students in schools, in communities, and before governing bodies and other decision-makers of policies or practices affecting students.” Use this plan from National PTA to get started:

Get Organized and Make a Plan

Step 1: Identify a Legislative/Advocacy Vice President.

The primary responsibility of a local PTA Legislative and/or Advocacy Vice President is to serve as the link between PTA's Public Policy program and your members. Begin by making sure advocacy is a regular conversation point—on your agenda at meetings, in your social media, and as updates via email. Learn more about the roles and responsibilities of a legislative or advocacy chair.

Step 2. Discuss Ways to Support Your School Improvement Plan.

Ask your principal for a meeting to talk about how your PTA can support the school improvement plan. Send a representative to your school community council meetings. Identify one to three objectives that will engage and empower families to be part of the solution at your school. Use the School of Excellence program as a road map to strengthening your family-school partnership around a specific school improvement goal.

Step 3. Mobilize Around a Specific School or Community Improvement.

The PTA can amplify your members' voices to make positive changes for students in your school and community. Maybe your issue is advocating for a safe route to school for students. Or perhaps your classrooms are overcrowded, or your roof needs major repairs.

Step 4. Learn from PTA's History.

For more than 120 years, PTA has influenced national policies and practices that promote children's education, health, and well-being. The results of PTA's advocacy include early childhood education, kindergarten, child labor laws, juvenile justice system, school lunch programs, and much more.

Step 5. Use and Understand the National and Utah PTA Public Policy Program to determine action on state and local legislation.

The Utah PTA Public Policy Program is the primary authority for public policy action and statements by Utah PTA on state and local legislation and administrative policies and regulations. Utah PTA can only speak to items where a Resolution or Position Statement are in place. Study the Utah PTA resolutions at utahpta.org/resolutions to gain a better understanding of the Utah PTA advocacy efforts.



Step 6. *Sign Up for State and Federal Action Alerts.*

Email the Utah PTA Advocacy Vice President, Kristina Pexton, at kristina@utahpta.org, to join the Utah PTA Take Action Network for notifications when PTA members are needed to take action on significant state legislation or policy alerts. Sign up at [PTA.org/Home/Advocacy/Take-Action](https://pta.org/Home/Advocacy/Take-Action) to get alerts from National PTA.

Step 7. *Save the Date --- Utah PTA Advocacy Conference and Utah PTA Day at the Capitol.*

Join the Utah PTA commissioners and learn about the critical issues facing Utah's children at the annual Utah PTA Advocacy Conference in the fall. Let your legislators know that Utah PTA is in the House by attending Utah PTA Day at the Capitol during the legislative session. See UtahPTA.org for exact dates.

Step 8. *Join the Utah PTA Advocacy Facebook Group.*

Share with other PTA leaders what you are doing to advocate for the children in your school. Get updates from Utah PTA commissioners in the areas of community engagement, education, family life, health, individual development, safety, and student development.

Step 9. *Get Involved in Statewide Advocacy Efforts. Join a Utah PTA commission or the Legislative Advocacy Committee.*

Encourage your Legislative/Advocacy Vice President, any member of your PTA, or take the opportunity yourself to join a Utah PTA commission or the Legislative Advocacy Committee (LAC).

Commissions in the areas of community engagement, education, family life, health, individual development, safety, and student leadership meet three to four times per year and discuss current issues related to the topic of the commission. Community Partners from outside organizations provide meaningful information and allow attendees to become better acquainted with the needs of children throughout the state.

All Utah PTA members are invited to join LAC. This committee meets once per month during the school year and weekly during the legislative session. This committee discusses and recommends the positions Utah PTA should take on legislation and other policy issues. Contact the Utah PTA Advocacy VP, Kristina Pexton, at kristina@utahpta.org for more information on LAC.

Step 10. *Increase Utah PTA Advocacy Efforts by Submitting a Resolution.*

Is there an area where you feel that Utah PTA should be advocating for children? Check to see if there is a resolution in place and if not, then submit a resolution on that topic.

A resolution is a call for action. It is a statement which may give direction for that action, such as legislative directives and policies, and state and local community involvement. A resolution may also memorialize, commemorate, or express appreciation. Local PTAs, councils, regions, and Utah PTA commissions and committees may submit resolutions for consideration to the Utah PTA Resolutions Committee. For more information send an email to Resolutions@utahpta.org.



UTAH PTA PUBLIC POLICY PROGRAM

The Utah PTA Public Program is the primary authority for public policy action and statements by Utah PTA on state and local legislation and administrative policies and regulations.

The Utah PTA Purposes

- To promote the welfare of children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring in to closer relation the home and the school, that parents and teachers may cooperate more intelligently in the education of children and youth.
- To develop, between educators and the general public, such united efforts as will secure, for all children and youth, the highest advantages in physical, social, and spiritual education.

The Utah PTA Public Policy Program has five components:

1. The National PTA and Utah PTA Mission statement and values
2. The National PTA and Utah PTA Resolutions
3. The Utah PTA Legislative Policy
4. The Utah PTA Legislative Priorities
5. National PTA and Utah PTA Position Statements

1. The National PTA and Utah PTA Mission statement and values

National PTA Mission

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

National 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.

Utah PTA Mission statement

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

Vision of Utah PTA:

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 decision 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.

2. The National PTA and Utah PTA Resolutions

Resolutions and positions are formal statements of



PTA public or association policy voted by the delegates at the annual Advocacy Conference or the annual National PTA and Utah PTA Conventions.

The process for moving forward a Utah PTA resolution is:

1. A PTA can propose resolutions to the Utah PTA Resolutions Committee.
2. The Utah PTA Resolutions Committee reviews submitted resolutions and recommends action to the Utah PTA Board of Directors. The Utah PTA Board of Directors forwards resolutions to the delegates at either the Advocacy Conference or the Leadership Convention for consideration.
3. Resolutions must be approved by the conference or convention body to become official policies of the association.

Utah PTA resolutions and position statements are found on the Utah PTA website: www.UtahPTA.org/Statements-Positions

3. The Utah PTA Legislative Policy

The legislative policy is the philosophy and general principles which guide the Utah PTA’s consideration of proposed legislation.

The Utah PTA is a non-profit, grassroots, child advocacy association made up of parents, teachers, and students. The legislative program of the Utah PTA is derived from the work of PTA in home, school, and community. PTA efforts “to secure adequate laws for the care and protection of children and youth” are based upon: (1) the recognition of the home as the foundation of our society; (2) parental involvement as an essential component of all policy-making processes pertaining to children; (3) the observance and understanding of the rights and obligations of responsible citizenship and ethical government; and, (4) the realization that maintaining a free and public education system is a cornerstone of democracy—that the Utah Public Education System is created in the state Constitution to “secure and perpetuate” freedom.

General Principles for Consideration of Proposed Legislation:

1. Equity in the form of equal justice, privileges, opportunities, and responsibilities in every phase of life for all children and youth, while recognizing.....

that each child is unique with individual needs and talents.

2. High standards for those who work in all areas concerned with children and youth. Coordination and planning by all agencies with clear definition of responsibility at each level of government.
3. Prioritizing the needs of all children and youth, while adhering to fiscal responsibility in government.
4. Maximum local control when it serves the best interest of all children and youth.
5. Continued maintenance of the constitutional guarantee of financial support for public schools as the first claim on state revenues.
6. Maintenance of Utah PTA’s viability as a non-profit voice for children.

4. Utah PTA Legislative Priorities

The Utah PTA Legislative Priorities are based upon the actions called for by the Utah PTA and National PTA resolutions and position statements. Rather than providing an exhaustive list of the areas in which the Utah PTA is involved, the priorities are indicative of issues on which PTA expects to target its efforts and activity. All PTA statewide public policy work is consistent with the Utah PTA’s priorities, resolutions, and position statements.

Utah PTA Legislative Priorities are approved by Utah PTA members annually during the Advocacy Conference Business meeting. Refer to the Public Policy Program under the Advocacy Vice President section at UtahPTA.org for the current year legislative priorities.

5. The Utah and National PTA Position Statements

Position statements are initiated by members of the Utah PTA or National PTA Board of Directors and approved by a majority vote of that body. Position statements provide guidance rather than prescribe specific policy actions to be taken by the association and are meant to be temporary in their nature until a resolution on the issue can be passed by the membership at the annual Utah PTA Advocacy Conference or Leadership Convention. Position statements have the same level of authority as resolutions.

Note: The Utah PTA Public Policy Program is updated every fall. Please attend the Utah PTA Advocacy Conference or the Legislative Advocacy Committee to be involved in the process of updating this document.



PROTECTING THE UTAH PTA 501 C(3) STATUS

Utah PTA is a non-profit 501(c)(3) organization. The U.S. Constitution, Congress, and the IRS have protected the rights of non-profits to engage in advocacy and legislative lobbying. It is important that PTA leaders follow the non-profit rules regarding our advocacy efforts. The federal tax code and Utah Election policy dictates some important rules to follow.

Remain Non-partisan

The federal tax code states, “that non-profit organizations defined as 501(c)(3) charities may not conduct partisan political activities in support of or opposition to a candidate running for public office.”

Utah PTA local, councils, region, and state boards may not:

- ♦ Endorse or oppose a candidate running for public office.
- ♦ Make a campaign contribution to or expenditure for or against a candidate.
- ♦ Rate candidates on who is most favorable to your issue.
- ♦ Let candidates use the organization’s facilities or resources, unless those resources are made equally available to all candidates at their fair market value.

NonProfitVote.org/NonProfits-Voting-Elections-Online/General-Rules/

No Use of Public Emails

It is important to remember that no school emails may be used for political purposes. If your PTA uses emails associated with school or district accounts, it is imperative that they are not used to create or forward any political information. We encourage all leaders to join the Take Action Hub with your personal email.

The law associated with political activity is located at this link:

LE.Utah.gov/XCode/Title20A/Chapter11/C20A-11-P12_1800010118000101.pdf

Part 12

Political Activities of Public Entities Act

20A-11-1205 Use of public email for a political purpose.

- (1) Except as provided in Subsection (5), a person may not send an email using the email of a public entity:
 - (a) for a political purpose;
 - (b) to advocate for or against a proposed initiative, initiative, proposed referendum, or referendum; or
 - (c) to solicit a campaign contribution.



MEET THE CANDIDATES OR MEET YOUR ELECTED OFFICIALS NIGHT

Candidates and elected officials (legislators, state or local school board members) appreciate a forum where they can meet with their constituents, discuss their views, and listen to concerns. During an election year (even years) this forum would be a Meet the Candidates Night. On non-election years (odd years) this could be an issues night. When organizing these events, it is best to combine with other schools within your region or council. Remember, this is a PTA event and you are in charge. However, you may invite other entities such as the League of Women Voters to join.

To Organize the Event:

- ♦ Begin planning your event early, in August or early September, contact all political parties to give the date of event.
- ♦ Decide on the community to be involved—high school (plus feeder schools) or region or council.
- ♦ Invite the Legislative/Advocacy Vice Presidents from all the schools to be involved in the planning.
- ♦ Determine the time, date, and location.
 - October is usually the best month.
 - A large auditorium may not be the best facility for the event.
- ♦ Obtain the names and information on ALL candidates (in election year) and all elected officials (non-election year). It is imperative that ALL candidates be invited to protect our 501(c)(3) status.
- ♦ Include local and state school board candidates during election year.
- ♦ Send formal invitations to each candidate with an RSVP date given.
- ♦ Advertise the event through schools, posters, newspapers, social media, etc.
- ♦ Invite the entire community, not just PTA members.
- ♦ Plan an outline and format for the evening:
 - Open House
 - 30 minutes prior to general meeting
 - Allows one-on-one conversations
 - Tables for candidates to put materials
 - General Meeting
 - Welcome, reverence, flag ceremony
 - Allow one minute for each candidate or legislator to introduce themselves
 - Hand out 3x5 cards for the audience to write questions
 - Have a moderator and timer with time cards
 - All questions are written and given to the moderator
 - Give candidates one minutes to answer individual questions. Limit rebuttals to thirty seconds.
 - Give each candidate or legislator a one minute wrap-up at the end

Send thank-you cards to all the candidates and legislators who attend.



ELECTED OFFICIALS AND LEGISLATION INFORMATION

Local Elected Officials Information

This information can be obtained through the Utah Legislature website: LE.Utah.gov.

Representative(s) _____

Email Address(es) _____

Phone Number(s) _____

Senator(s) _____

Email Address(es) _____

Phone Number(s) _____

Legislative Advocacy Committee (LAC)

All Utah PTA members are invited to join the Utah PTA Legislative Advocacy Committee (LAC). LAC members attend legislative meetings to gather information on issues and bills which impact the lives of children. The committee meets monthly (weekly during the legislative session) to discuss issues and legislation. The committee recommends positions on specific bills and determines action to promote, amend, or defeat legislation. Utah PTA only takes bill positions based upon the PTA Public Policy Program and our resolutions.

Utah PTA Take Action Network

The Utah PTA Take Action Network is an email list which members are encouraged to join. This list is not given out to anyone but is used to keep our members informed of the activities of our legislature and how they can become involved. The Network is activated as **alerts and calls to action** are needed during the session. The members also receive monthly updates during the interim sessions and weekly updates during the legislative session. To join the Utah PTA Take Action Legislative Network, send your name, school, and email address to the Utah PTA Advocacy VP, found on the Utah PTA website (UtahPTA.org). The network is maintained from year to year.

Utah PTA Legislative Bill Sheets

Utah PTA Legislative Bill Sheets are prepared from those positions recommended by the Utah PTA Legislative Advocacy Committee (LAC) and adopted by Utah PTA commissioners and Executive Committee. These sheets are available to any PTA member through the website and are updated weekly throughout the legislative session at UtahPTA.org/bills.

School Community Councils/School Board Meetings

Your presence at your local SCC and local school board meetings is important. PTA can partner with the SCC to help with the School Improvement Plan. As the school board members get to know you and your PTA, they will be more responsive to the needs of parents. This responsibility can be shared with other members of your board. If a member of your board is not on the SCC, assign someone to attend SCC and/or the local school board meetings and report back to the board.



NATIONAL PTA LEGISLATIVE PROGRAM

The National PTA Legislative Program is the primary authority for action taken by the National PTA on federal legislation and regulations.

The National PTA Legislative Program has four components:

1. Policy Statements are broad statements on children's issues that form the basis for resolutions and position statements. Policy statements become official when they are passed by the National PTA Convention delegates or the National PTA Board of Directors and by 60% of state PTAs.
2. Resolutions with legislative intent can be proposed by any PTA. The National PTA Board of Directors recommends resolutions for consideration by delegates at the National PTA Convention. Resolutions must be approved by the convention body and then ratified by the National PTA Board of Directors to become positions of the organization.
3. Position statements are initiated by committees and commissions of the National PTA Board of Directors. They are approved by the National PTA Board of Directors.
4. Legislative Directives are the organization's current legislative priorities. They are reviewed by the National PTA Board of Directors and approved by the Executive Committee every two years.

NATIONAL PTA LEGISLATIVE PROCEDURES

- ♦ PTA Takes Action, the National PTA's legislative newsletter, provides current information on legislative issues and suggests advocacy strategies. It is emailed to member-to-member participants and also contains Action Alerts.
- ♦ The National PTA website ([PTA.org](https://www.pta.org)) legislative activity page provides information about PTA legislative issues and initiatives.
- ♦ National PTA's toll free legislative information line, (800) 307-4PTA (4782).
- ♦ National PTA Resolutions, position statements, and legislative directives are accessible at all state PTA offices, and many are found online at [PTA.org](https://www.pta.org).

PTA is a non-profit organization.

It takes positions on legislative issues but is non-partisan and endorses NO candidates for public office.



PRACTICAL PARLIAMENTARY GUIDE

A simple table of the most frequently used motions

MOTION	SECOND	DEBATABLE	AMENDABLE	VOTE REQUIRED	RECONSIDERABLE ?
Adjourn	Yes	No	No	Majority	No
Amend a Pending Motion	Yes	Yes if motion to be amended is debatable	Yes	Majority	Yes
Close Nominations	Yes	No	Yes	2/3	No
Debate limit or extend	Yes	No	Yes	2/3	Yes
Division of Assembly	No	No	No	Any member	No
Main Motion	Yes	Yes	Yes	Majority	Yes
Point of Order	No	No	No	Ruled on by chair	No
Postpone to a Definite Time	Yes	Yes	Yes	Majority	Yes
Previous Question	Yes	No	No	2/3	Yes
Question of Privilege	No	No	No	Majority	Yes
Recess	Yes	No	Yes	Majority	No
Reconsider	Yes	Yes if motion to which applied is debatable	No	Majority	No
Refer (commit)	Yes	Yes	Yes	Majority	No
Rescind	Yes	Yes	Yes	Majority with notice 2/3 without notice	Yes
Suspension of Rules	Yes	No	No	2/3	No
Table	Yes	No	No	Majority	No
Take from Table	Yes	No	No	Majority	No
Withdrawal of Motion	No	No	No	Majority	No

1. A tie vote is a lost vote.
2. Hasty action may be corrected by use of the motion to reconsider. This motion may be made only by one who voted on the prevailing side.
3. To stop debate and force the vote a member should obtain the floor and say, "I move the previous question." This requires a second and a two-thirds vote.





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GUIDELINES FOR PUBLIC RELATIONS

What is Public Relations?

Public relations is more than getting an interview in your local newspaper or on your local television, radio, or cable station. It encompasses all communication vehicles used by your local PTA. Public relations includes fliers, brochures, use of PTA websites, use of social media, email, PTA speakers, exhibits, your reputation in the community, and communications among PTA members, as well as a presence in the media.

Public relations can help you attract new members, increase meeting attendance, and public awareness to your PTA programs, events, and activities. It should be an integral part of all your PTA efforts.

First Steps in Planning Your Public Relations Campaign

Before beginning to plan your PTA campaign, take a few moments to develop a file of basic PTA resources. This will help you organize the many PR activities you will undertake, and it can be used as a preliminary evaluation tool of your PR efforts.

Learn all you can about the PTA - its goals, mission statement, programs, policies, and activities on the local, state, and national levels. Take a few moments to familiarize yourself with National PTA publications, such as *Our Children* magazine, National Standards for Family-School Partnerships, and the Utah PTA Public Relations Web page.

Develop a list of PTA leaders who can speak for the organization. Make sure you have the names and telephone numbers of all the PTA officers. Keep information on your PTA and its activities close at hand so that you can always answer questions. Seek options of communication with all your parents.

Remember your school is unique. You have your own message and programs to broadcast that meet the needs at your school. Make sure that all your parents are hearing the message.

Check Your Internal Public Relations

Your communication with parents at your school and members of the PTA is equally as important as working with members of the community and media. Good internal public relations needs to be more than word of mouth. What tools are in your public relations tool kit? How will you communicate with the members? Utilize social media, websites, newsletters, emails, face to face, text messages, and phone calls.



BRANDING

It is important to use the PTA brand and tag line "every child. one voice." Putting the PTA brand on all info that goes out to the members and the community will bring recognition.

Newsletters

Be sure that your newsletter is identified as a PTA newsletter. Use the full name of the PTA. List the complete address and issue date. Type and duplicate your newsletter neatly, always include a PTA contact name and phone number. Use the PTA logo.

Establish a schedule for the newsletter and get it out on time.

Keep articles simple and short. Try to include articles that cater to the interest of your members. Proofread the copy carefully with several sets of eyes.

Encourage the PTA president and school principal to contribute articles for the newsletter.

Information topics for articles that could be included in your newsletters could include:

- ♦ PTA news and activities
- ♦ School news and activities
- ♦ Honors and awards of students and teachers
- ♦ Health information from the school nurse or Health Commissioner
- ♦ Upcoming meeting information
- ♦ Current PTA projects
- ♦ Calendars
- ♦ School lunch menus
- ♦ PTA and school budgets
- ♦ Proposed changes in the curriculum
- ♦ Changes in school board policy
- ♦ Publicize local, council, region, state, and National PTA information
- ♦ Include local and Utah PTA websites (utahpta.org) and encourage their use
- ♦ Information from your commissioners
- ♦ Legislative information pertaining to educational issues
- ♦ Always include information on how to join PTA and how to help at the school as a volunteer
- ♦ Resources for parents on various topics
- ♦ Messages from the principal and PTA president
- ♦ Community partnerships



PLANNING A SUCCESSFUL PR CAMPAIGN

Here are five easy steps to help you achieve your public relations goals:

1. Set realistic, measurable goals. Put these goals in writing. For example, you might want to attract 50 parents to a PTA meeting or increase Reflections entries by 10%.
2. Decide who you want to reach: PTA members, parents of all the students at the school, teachers and administrators, and community leaders. How will you reach them? Media, fliers, newsletters, community posters, email, and websites.
3. Develop a timetable for contacting the media. Know media deadlines and reporters who might be interested. This is where your carefully crafted media list comes into the plan.
4. Delegate responsibility. Form a Public Relationship Committee. Since no one can do it alone, ask others for assistance.
5. Use a formal evaluation tool for your public relations report.

WORKING WITH THE MEDIA

First, you must realize that you can't control the media. While you can send them materials and ideas, they will decide whether and how they will be used. You can increase your chances of success by knowing what types of stories will interest different media representatives and how to contact them. Most of the news media is available via Twitter. It is suggested that you have a Twitter account and follow the press and they may follow you back.

Develop a nose for news. Before contacting the media, determine whether your story idea is news—not all PTA activities are. Learn what's considered newsworthy by studying local newspapers and broadcast media. Determine what they consider newsworthy and how they present a story. Google alerts via email are a great tool to use to access stories that will be of interest to your PTA.

Use your media list. It will help you determine what reporter or editor should be notified about a PTA event. A general meeting may be listed in the community calendar section or on their website but will not be considered news. However, if your PTA is addressing an issue of vital interest to the community, a media outlet may send a reporter or ask for a follow up interview.

Look for photo opportunities. Most news outlets are using more photographs. Ask your local newspaper to send a photographer. You may also take your own photographs or video and send them to the news outlets immediately after the event. The news outlets are cutting back on personnel and cannot be everywhere across the state. We are finding that we have had news stories covered by sending the news outlets our own pictures and other material. Make sure you send detailed information with any picture or video that you send them and complete contact information so that they can do a follow up interview for the story. Be sure your photos and videos show action and activity and not just people smiling and shaking hands. Contact more than one media source for coverage of your story idea.



Use media community calendars to advertise PTA events. These calendars can easily be accessed on the different media websites.

Be selective about your story ideas you send to your local media. If you bombard the media with media releases about stories that are not news, editors may begin to ignore all communications from your PTA.

Media (Press) Releases

All PTAs should send out media releases. Send the media release to a specific media representative one week prior to the event. Attach any brochures or other material related to the event. If possible, limit the release to one page. A release is designed to spark interest, not tell the whole story. Call the reporter or editor to see if the release was received and offer to provide additional information before, during, and after the event.

How well the media release is written is almost as important as the information it contains. The most important information comes first, with less important details in later paragraphs.

Be sure to include the following in all media releases:

1. Who, what, when, where, and how. Cover these points early in the release.
2. Be brief. Keep the releases short using simple language and sentences.
3. Double-space. Leave at least one inch margins on all sides.
4. Avoid editorializing. Just state the facts. Tell it like it is.
5. Use only formal titles, not common titles. On second mention, refer to both men and women by their last names.
6. Proofread. Check and double-check spelling, grammar, and punctuation.

Writing Media (Press) Releases

1. A heading stating MEDIA RELEASE, name of the PTA, and school address.
2. FOR IMMEDIATE RELEASE or FOR RELEASE ON. The media release should be typed in capital letters upper right portion of the page. Directly below these words indicate the date for release.
3. A contact person. A name with a daytime telephone number should be included near the top of the page so reporters can call for additional information.
4. A short headline. A title with capital letters (example: PTA PRESIDENT ELECTED) that gives a quick preview of the contents of the release.
5. A dateline. This is the city (City, UT) from which the release is issued. Place this at the beginning of the first paragraph.
6. Use the PTA logo
7. End marks. If the release is more than one page, place the page number and release headline at the top of both pages (example: Page 2 - PTA President Elected).
8. At the end of the release, put ### marks centered after the last paragraph to let readers know the release ends.



Sample Media Release

Utah PTA
5192 South Greenpine Dr.
Salt Lake City, UT 84123
801-261-3100
utahpta.org

FOR IMMEDIATE RELEASE:

Jan 27, 2023

Utah PTA is proud to report to the Governor and Legislature that Utah PTA supports Utah communities, schools and children.

The value of the Utah PTA Volunteer Hours for February 2023 through January 2024 is based on the average estimated value of volunteer time nationally for 2022 which was \$29.95 per hour as determined by the “Independent Sector’s Value of Volunteer Time.”

The estimate helps acknowledge the army of PTA volunteers who dedicate their time, talents, and energy to making a difference in our communities, our schools, and to making a difference in the lives of children.

Utah PTA receives reports three times annually from the PTA local schools, council PTAs, region PTAs and state PTA volunteer giving the hours donated by all volunteers throughout the state:

The schools, councils, region, and state volunteers who reported hours from February 2022 – January 2023 totaled 735,543 hours. Based on the 2022 estimated value of volunteer time the total donated time at \$29.95 per hour is \$22,029,512.85.

We hope that all Legislators will acknowledge the work done by the PTAs and parents in their communities.

#



Preparing for Interviews

Preparation is the key to a successful interview. Prepare and practice ahead of time, if possible.

Before the interview find out the following:

- ♦ The names of the reporter and the cameraman.
- ♦ Length of the interview.
- ♦ Topic to be covered.
- ♦ Will other guests be there? Who? Do your homework.
- ♦ Physical setting; for example, will you be sitting at a table, standing, etc.?
- ♦ For broadcast interviews, will it be live or taped?
- ♦ When the interview will be printed or broadcast?
- ♦ Do we need pictures sent in and our PTA logo?

It is often said that public relations is the job of everyone in PTA. This is definitely a true concept since public relations is the crucial part of marketing your PTA and your PTA programs. Good public relations practices will help you in attracting support and volunteers to join your mission and goals for your PTA. Every PTA should have public relations position on their board.

The public relations individual will work closely with the PTA president and the PTA board to guide and direct the Public Relations Committee in creating and implementing a successful public relations and membership campaign based on the needs assessments and goals determined by the PTA board.

The Public Relations Committee establishes the public relations goals for the PTA for the current school year and in coordination with the Membership Chair implements the membership campaign and evaluates its success. The elected public relations individual serves as the head of the Public Relations Committee. As the chair of the committee it is expected that the responsibilities will include obtaining public relations plans from each member of the board who is in charge of a specific program or event for the PTA. This would include things such as the membership campaign, PTA sponsored meetings, Reflections program, carnivals, Red Ribbon week, book fairs, and any other PTA activity. The Public Relations Chair and committee may help these board members in creating their public relations plan for the year. The Public Relations Committee will establish a public relations time line for implementing its membership campaign for the year.

The Membership Chair would serve on the Public Relations Committee. The public relations plan should be based on input from the president, the PTA board, Membership Chair, and commissioners, as well as needs assessments from your PTA membership. The Public Relations Committee should be proactive in communication of events and programs throughout the year. Social media is a great tool to get the word out for the events and programs.



RESPONSIBILITIES OF THE PUBLIC RELATIONS POSITION

1. Be a PTA member and serve your full term as elected by the PTA membership or appointed by the PTA officers.
2. Learn and know all you can about the PTA—its history, goals, programs, policies, PTA Day at the Capitol, activities, publications, websites, social media involvement, and meetings.
3. Consult the Utah PTA communications web page for information about how to perform your public relations duties
4. Act as an aide to the president and perform such duties as delegated or assigned by the PTA officers or president.
5. Work closely with the PTA president and Membership Chair and assist board members to promote events.
6. Submit to the PTA officers a recommended budget to cover costs of the Public Relations Committee's projected campaign and plans for the year.
7. Attend all scheduled PTA board and committee meetings, Utah PTA conventions, and outreach training meetings.
8. Know and work with your council, region, and Utah PTA public relations.
9. Form and chair the Public Relations Committee. Elect a vice chair and secretary for the Public Relations Committee. Meet regularly and delegate responsibility as you facilitate, lead, supervise, and coordinate the work of that committee in publicizing your PTA/PTSA programs and activities.
10. Present recommendations for Public Relations Committee to the PTA board.
11. In partnership with the Public Relations Committee, develop and implement a successful public relations membership campaign for your PTA for the current school year.
12. Keep informed of all activities and programs of your PTA.
13. Plan and carry out PTA Founder's Day activities and celebration in February.
14. Take every opportunity to publicize and spotlight what your PTA is doing.
15. Serve as a liaison between your PTA and the media.
16. Write and submit media releases to the president to be checked before releasing to the media.
17. Send pictures of your PTA events to Utah PTA to show on the website and social media.
18. Evaluate public relations campaign and report to PTA president and Executive Committee.
19. Collect volunteer hours of members and consultants serving on the Public Relations Committee and report them at each PTA board meeting.
20. Guarantee that recognitions are acknowledged and thank you notes are sent.
21. Maintain all PTA social media accounts.
22. With the help of the Public Relations Committee, create marketing displays to use at meetings and events.



Files and Procedure Books Should Include:

- ♦ Contact information of the Public Relations Committee (complete with names, addresses, phone numbers, and email).
- ♦ Copies of Public Relations Committee budget information.
- ♦ Public Relations campaign plans.
- ♦ Samples of all internal publicity.
- ♦ Copies of all press releases, fliers, and information used for events.
- ♦ Pictures of displays, exhibits, or bulletin boards used for public relations.
- ♦ Utah PTA logo and school PTA logo.
- ♦ Social media passwords and log in information.
- ♦ Media contacts including all contact information.
- ♦ Contact information for any press, community leaders, and organizations used for public relations.

Forming a Public Relations Committee:

1. Committee Size

- ♦ Size varies depending on the size of your PTA, publicity channels, and needs of the local, council, region, or Utah PTA.
- ♦ A successful Public Relations Committee is not a committee of one.
- ♦ Most Public Relations Committees include from four to eight regular members.

2. Committee Composition

- ♦ The Public Relations Committee Chair will be the elected public relations representative.
- ♦ A local PTA public relations representative should include parents, teachers, principal, and the PTA president.
- ♦ Local PTSA committees should include at least one student.
- ♦ The membership representative should be included.
- ♦ Community liaisons and consultants may be asked to be a part of your Public Relations Committee.

PTA FOUNDERS DAY—FEBRUARY 17

Announce PTA Founders Day in newsletters, social media, and any other communications.



SOCIAL MEDIA AND PUBLIC RELATIONS

Social Media should be one of your primary sources of information sharing. Corporations, small businesses, government entities, charities, and all community organizations recognize and use social media in ever increasing ways. Use of social media to get messages out is immediate and far reaching and allows for input and interaction of your audiences. The benefits are significant. As you decide to use social media, there are a few things to consider.

Facebook

Like us on Facebook! Encourage your parents to like Utah PTA on Facebook and then link your Facebook page to the Utah PTA and National Facebook pages so that you are delivering information from their pages to your membership. This will make sure that all resources are available to every PTA member. Also, join us at Utah PTA Excellent Elementary and Utah PTA Super Secondary Facebook pages. We also have an Advocacy Group, Treasurer's Group, a Utah School Community Council Group, and a Reflections group that you can join. Groups are a great resource to learn from many other PTA leaders from all over Utah.

Twitter

Follow us on Twitter: remind your PTA members to follow Utah PTA on Twitter to get important up to date information. We will be using this in increasing ways during the legislative session to let members know about important legislation. Many of the Utah Legislators follow Utah PTA on Twitter and we get their posts. This is also a great way to remind members about deadlines and events. Twitter is an important way to discuss topics and get information out fast. Follow Utah PTA on Twitter: @UtahPTAOneVoice.

Pinterest

This is a great way to share ideas for PTA parents, volunteers, and teachers. Join us on Pinterest today. It is easy to get started. Just go to the Pinterest site, sign up to be a member, and then follow Utah PTA. If you click on “about,” which is on the Pinterest header, and then the help button, it will give you a tutorial of how to use Pinterest. We welcome your ideas for us to use on Pinterest. Follow Utah PTA on Pinterest [Pinterest.com/UtahPTA](https://www.pinterest.com/UtahPTA).

Instagram

Utah PTA is also on Instagram. Follow us and we will follow back. A picture is worth a thousand words! We would love to see your pictures and we will be sharing our pictures. This is a great way to document your events, meetings, carnivals, ribbon weeks, Reflections, and Battle of the Bands! We hope to see you in the PICS. Follow us at Utah PTA.

YouTube

Utah PTA is also on YouTube. Please subscribe to UtahPTA One Voice to watch videos from Utah PTA.



UTAH PTA SOCIAL MEDIA POLICY

The Purpose of Social Media is to:

- ♦ Promote PTA, membership, or PTA events
- ♦ Direct traffic to the PTA website for more information, encouraging participation and membership
- ♦ Promote best practices
- ♦ Provide accurate, relevant, and up-to-date information

Content

The Utah PTA Executive Committee shall approve the site and assign the responsibility for monitoring content. Passwords must be given to three board members. Content on all social media outlets used by the PTA shall:

- ♦ Be civil, cordial, and relevant
- ♦ Be welcoming to all families
- ♦ Not use explicit or profane language and acronyms of explicit expressions
- ♦ Not use offensive language, including but not limited to ethnic, religious, and racial slurs
- ♦ Not air grievances with PTA, school board members, school administrators, teachers, PTA members, students, or other individuals
- ♦ Not further an issue or product for personal or professional gain
- ♦ Not include documents that are for members only, such as bylaws, minutes, and financials, unless access is protected and available only to members of this PTA
- ♦ Not endorse, promote, or solicit on behalf of a business, product, or service
- ♦ Not endorse a candidate or political party
- ♦ Not include comments and posts intended as advertising
- ♦ Be verified for access
- ♦ Obtain permission from individuals prior to posting photographs and videos
- ♦ Know individual school district policy for social media use

Check with the school district's communications administrator for the guidelines on the photo release policy, or obtain a signed photo release through the PTA before publishing any photo or video.

Notice

Utah PTA and its locals, councils, and regions are encouraged to post the following information on their social media site so visitors are aware of the expectations.

_____ PTA is a noncommercial, nonsectarian, nonpartisan association that does not endorse any candidate or political party. This PTA does not endorse non-PTA products or services.

- ♦ Solicitation, or anything that resembles solicitation, shall not be posted on this site. If complaints are received about content or if the PTA deems content to be advertising, that content will be removed regardless of whether the content is relevant to our members.
- ♦ Offensive or inappropriate content will not be tolerated and will be removed and author will be banned from the site.
- ♦ Posts endorsing candidate for office or any political party shall be removed immediately.

This site is not the appropriate place to express complaints and grievances. If you have a concern please contact a member of the Utah PTA Executive Committee.



Dear Scholarship Applicant,

PTA is the largest for child advocacy voice in the state of Utah. PTA works directly for children and advocates for them with local, state, and national governments.

In helping every child achieve their goal for higher education, it is the pleasure of Utah PTA to be able to offer four \$1,000 scholarships.

Utah PTA offers these scholarships to support students focused on a career goal. Utah PTA supports education and believes strongly in post high school education.

All eligible students are encouraged to apply for this opportunity from Utah PTA.

Sincerely,



Corey Fairholm
Utah PTA President

UTAH PTA/PTSA STUDENT SCHOLARSHIP

Information

Application Due to the Utah PTA by March 1, 2024.

Utah PTA supports public education. Utah PTA believes that all students have the right to an education at a public school. A student who desires to further their education in an institute of higher learning or technical school following their graduation should have the opportunity to do so. We realize that for students to further their education it requires funding. It is our privilege and honor to give \$1,000 scholarships to four Utah seniors. Utah PTA would encourage students who are seniors to apply for this scholarship. The Scholarship Application is an online form that can be found at: UtahPTA.org/Student-Scholarship-Application

The application must be completed in one setting. It cannot be saved and finished later. Please see what needs to be completed below:

Qualifications:

1. Applicant must be graduating from high school in the current school year.
2. Applicant must be accepted to a college, university, or vocational school.
3. Applicant must be a current PTSA/PTA member.
4. Applicant must have at least 3.0 cumulative GPA.
5. Applicant must fully complete the application with requested attachments.
6. Scholarship must be used within one year. (Deferred admissions accepted.)
7. Applicants may receive only one (total) scholarship from Utah PTA, including all of its programs. Winners of this scholarship will be ineligible to receive additional leadership scholarships, etc. from Utah PTA.
8. Winning applicants will be required to supply Utah PTA with their university ID, student number, or social security number for correct payment to their student account at the designated school.

Please Include With This Application:

Be prepared to submit:

- A. Two letters of recommendation describing your character and qualities developed during your school years from teachers, leaders, coaches, etc.
- B. Please be prepared to answer the following essay questions. There is a limit of 250 words for each answer.
 - ♦ Question 1) How has your participation in PTSA impacted your life? How has it made a difference at your high school?
 - ♦ Question 2) Describe a time in your life when things did not go the way you planned. How did you respond? Or, describe a challenge you have experienced and how you overcame it.
 - ♦ Question 3) Where do you see yourself in five years?
 - ♦ Question 4) If you could change one thing, whether about the world or about yourself, what would it be? How do you plan to use your post-secondary education in this endeavor?
- C. A PDF copy of your official high school transcript.
- D. A PDF copy of your resume that includes extracurricular activities, humanitarian efforts, PTSA involvement, work experience.



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PTA PROGRAMS AND RESOURCES AND HOW TO USE THEM

National PTA and Utah PTA provide many programs and resources for local PTA units. Programs and resources are supported and made available through Utah PTA commissions. All of the links are live when you access the handbook online or through the Utah PTA app.

National PTA Resources

- ♦ National PTA website: [PTA.org](https://www.pta.org)
- ♦ [PTA e-Learning Courses](#)
- ♦ [Every Child in Focus](#)
- ♦ Grants at [PTA.org/Grants](https://www.pta.org/Grants)
- ♦ [Healthy Lifestyles](#)
- ♦ [Local Leader Tool Kit](#)
- ♦ [Lead a PTA Virtually](#)
- ♦ [One Voice](#) National PTA
- ♦ [Our Children](#) e-magazine
- ♦ [National Standards for Family-School Partnerships](#)
- ♦ [Notes from the Backpack](#) podcast
- ♦ [Parent Guides to Student Success](#)
- ♦ [PTA Connected](#)
- ♦ [PTA Local Leaders Facebook group](#)
- ♦ [PTA e-Newsletters](#)
- ♦ [PTA Membership Campaign](#)
- ♦ [PTA Member Offers](#)
- ♦ [PTA Takes Action Alerts](#) (legislative)
- ♦ Social Media ([Facebook](#), [Twitter](#))
- ♦ [Spanish Resources](#)
- ♦ [Special Education Toolkit](#)
- ♦ [Stem + Families](#)
- ♦ [The Smart Talk](#)

National and Utah PTA Programs

National and Utah PTA Programs

- ♦ Bullying: [Connect for Respect](#)
- ♦ [Family Reading Experience](#)
- ♦ [Reflections](#)
- ♦ [Schools of Excellence](#)
- ♦ [Take Your Family to School Week](#)
- ♦ [Teacher Appreciation](#)

Utah PTA Programs

- ♦ [Battle of the Bands](#) (PTSA)
- ♦ [Come Play with PTA](#)
- ♦ [Commissioner Connection Newsletter](#)
- ♦ [Practical PTA](#) via Zoom
- ♦ [Ribbon Week Toolkit](#)
- ♦ [Suicide Prevention Toolkit](#)
- ♦ [Teen Healthy Relationships Month](#) (PTSA)

Utah PTA Conferences and Trainings

- ♦ [Advocacy Conference](#) (Fall)
- ♦ [Leadership Convention](#) (May)
- ♦ [PTA Day at the Capitol](#) (February)
- ♦ [PTSA Student Leadership Conference](#) (Fall)

Utah PTA Awards, Grants and Scholarships

- ♦ [Arts Education and Supplies Grants](#)
- ♦ [Gold Star](#)
- ♦ [LEAP Award](#)
- ♦ [Membership Awards](#)
- ♦ [Student Scholarships](#)



Executive Committee members and commissioners represent children's interests by attending or sitting on numerous different committees across the state. These committees include government task forces, state organizations, and community partners.

Some of these committees include:

- ♦ Action for Healthy Kids Utah
- ♦ Artworks for Kids
- ♦ Assessment and Accountability Policy Advisory Committee
- ♦ Early Childhood Commission
- ♦ Intergenerational Poverty Advisory Committee
- ♦ Parents Empowered
- ♦ Safe Kids Utah
- ♦ SMART Coalition
- ♦ Suicide Prevention Faith Advisory Committee
- ♦ Trust Lands Advisory Committees (TLAC/SITLA/SITFO)
- ♦ Uplift Utah/Resilient Utah
- ♦ Utah Anti-Bullying Coalition
- ♦ Utah Division of Arts and Museums (UDAM)
- ♦ Utah Gun Safety Coalition
- ♦ Utah Public Education Coalition
- ♦ Utah Safe Utah App Committee
- ♦ Utah State Board of Education (USBE)
- ♦ Utah Suicide Prevention Coalition
- ♦ Utah Tobacco Free Alliance

Executive Committee - Officers

- ♦ President
 - Awards board specialist: Utah PTA awards
 - Bylaws board specialist
- ♦ President-elect
- ♦ Regions Vice President
 - Region directors
 - Council presidents
 - Region and Council Financial
- ♦ Advocacy Vice President
 - Advocacy Conference
 - PTA Day at the Capitol
 - Trustlands board specialist
 - Resolutions board specialist
- ♦ Treasurer
- ♦ Secretary

Directors

- ♦ Communications
 - Social media, press releases, practical PTA, student scholarships
- ♦ Membership
 - Membership awards
 - Membership contests
- ♦ Leadership
 - L.E.A.P. Awards
 - Utah PTA Gold Star Awards

Representatives

- ♦ Administrative representatives
- ♦ Teacher representative



Commissioners/Specialists/ Programs

At the state level, Utah PTA commissions consist of Community Engagement, Education, Family Life, Health, Individual Development, Safety, and Student Leadership. Utah PTA commissioners along with community partners are there to provide program ideas and resources for specific areas of concern for local commissioners. Information on each commission can be found at UtahPTA.org.

- ♦ Community Engagement
 - Diversity and Inclusivity
 - Male Engagement
- ♦ Education
 - Special Needs
- ♦ Family Life
 - Digital Wellness
 - Family Engagement
 - Military Family
- ♦ Health
- ♦ Individual Development
 - Arts Education Grant
 - Arts Supplies Grant
 - Character Development
 - Reflections
- ♦ Safety
- ♦ Student Leadership
 - Battle of the Bands
 - PTSA Student Day at the Capitol
 - Student Leadership Conference

Developing goals and plans that meet the interests and needs of a school community are primary objectives of a local PTA board. These objectives can be met through the structure of commissions, committees, programs, and events.

Commissions: 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

Committees: 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

Programs: 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: Guest speakers at PTA meetings, family nights, art walks, carnivals, field day



COMMISSIONS

Utah PTA commissions and related areas of concern are available to support local units. Under each commission is a brief description of the work of that commission and a list of program ideas and resources for your local unit to adapt and use. Areas of concern may overlap among commissions.

Community Engagement

The Community Engagement Commission will involve all members of the community, business, religious, and government entities in improving the quality of life and education of all children. Working together opens new horizons of possibilities for our future.

On a local level, the programs the commissioner will cover are determined by their executive board based on the needs assessment, which is done at the beginning of the year. Some of the ideas could include:

- ♦ Business partnerships UtahPTA.org/Sponsorships-Partnerships-Donations
- ♦ Come Play with PTA UtahPTA.org/Come-Play
- ♦ Community/public relations UtahPTA.org/Director-Communications
- ♦ Diversity and Inclusivity UtahPTA.org/Diversity-Inclusivity-Specialist
- ♦ Educating family and community groups
- ♦ Education foundations
- ♦ Family engagement UtahPTA.org/Family-Life-Commissioner
- ♦ Information/communication network plans
- ♦ Life-long education/community education UtahPTA.org/Education-Commissioner
- ♦ Male Engagement UtahPTA.org/Male-Engagement-Specialist
- ♦ Minority children
- ♦ Minority leadership/involvement
- ♦ Parent/community engagement events
- ♦ School trust land use and management
- ♦ Take Your Family to School Week
- ♦ Teacher appreciation UtahPTA.org/Teacher-Appreciation-Week
- ♦ Volunteer coordination UtahPTA.org/Appreciating-Your-Volunteers-Awards
- ♦ Volunteers UtahPTA.org/Volunteering



Education Commission

The mission of the Utah PTA Education Commission is to become knowledgeable about the issues which affect the education of students in the state of Utah, to take positive action to further the Purposes of PTA in promoting the welfare of children and youth at home and at school, and to promote programs which benefit and strengthen education through parental involvement.

On a local level, the programs the commissioner will cover are determined by their executive board based on the needs assessment, which is done at the beginning of the year. Some of the ideas could include:

Literacy

America's Battle of the Books BattleOfTheBooks.org

Book It Reading Program BookItProgram.com

Drop Everything and Read (D.E.A.R.) ReadingRockets.org/Calendar/Dear

DYAD Reading Method Schools.Utah.gov/Curr/Dyad

Jumpstart Read for the Record JStart.org/Read-For-The-Record/

Ken Garff - Keys to Success KTSUtah.org

KUED Annual Reading Marathon PBSUtah.org/Kids/Reading-Marathon/29th-Annual-Reading-Marathon/

National PTA - Family Reading Experience PTA.org/Home/Programs/Family-Reading

Read Across America ReadAcrossAmerica.org

Read Today (KSL) ReadToday.com/

STAR Tutoring Program Schools.Utah.gov/file/f6c8806e-a878-48d4-9ae2-cc4ca2c1314b

STEM

National PTA – STEM + Families PTA.org/Home/Programs/Stem

STEM Education Ideas UtahPTA.org/Stem-Education

Special Education

National PTA - Special Education Toolkit PTA.org/Home/Family-Resources/Special-Education-Toolkit

Online Education

Utah's Statewide Online Education Program Schools.Utah.gov/EdOnline



Family Life

The goal of the Utah PTA Family Life Commission is to promote healthy family relationships, thus resulting in success of children in all aspects of their lives. Utah PTA believes that the first and most important teacher throughout a child's life is the parent. The Family Life Commissioner aims to provide information and resources for parents and families as they encounter different stages and challenges of life. Specifically this includes early childhood, military families, digital wellness, family engagement, family relationships, and so much more related to the family life.

On a local level, the programs the commissioner will cover are determined by their executive board based on the needs assessment, which is done at the beginning of the year. Some of the ideas could include:

- ♦ Adoptions
- ♦ Blended families
- ♦ Child abuse: neglect, maltreatment, and exploitation
- ♦ Child care
- ♦ Child identity theft
- ♦ Child welfare improvement
- ♦ Center for Family Engagement: [PTA.org/Home/Family-Resources](https://pta.org/Home/Family-Resources)
- ♦ Critical viewing skills, media, and violence
- ♦ Digital Wellness
- ♦ Domestic violence
- ♦ Early childhood
- ♦ Educating family and community groups
- ♦ Family Education Plan (FEP)
- ♦ Family engagement
- ♦ Family literacy
- ♦ Foster care
- ♦ Homeless children
- ♦ Kindergarten readiness
- ♦ Low-income children/Title I/Headstart
- ♦ Military families
- ♦ Minority children
- ♦ National Standards for Family-School Partnerships
- ♦ National Family Month: [TalkItOver.org/National-Family-Month/](https://talkitover.org/National-Family-Month/)
- ♦ Non-traditional families
- ♦ Parent/family centers
- ♦ Parent/family involvement
- ♦ Parent support groups
- ♦ Preschools
- ♦ Prevent child abuse
- ♦ Quality parent training
- ♦ Take Your Family to School Week



Health

The goal of the Utah PTA Health Commission is to provide and utilize resources that are targeted to protect and improve the health of children and youth; to design, identify, and implement programs in areas of priority and concern; and, to build public awareness that will improve the quality of life for the children of Utah.

On a local level, the programs the commissioner will cover are determined by their executive board based on the needs assessment, which is done at the beginning of the year. Some of the ideas could include:

- ♦ AIDS/Sexually Transmitted Diseases
- ♦ Alcohol/drug/tobacco education
- ♦ Autism
- ♦ Dental care
- ♦ Eating disorders: Anorexia/Bulimia
- ♦ Environmental health
- ♦ Growth/maturation
- ♦ Health fairs
- ♦ Health needs of exceptional children/
“At-Risk” children
- ♦ Heat stress, dehydration, and sun exposure
- ♦ Healthy lifestyles
- ♦ Immunizations
- ♦ Juvenile migraines
- ♦ Mental/emotional health/hope
for tomorrow
- ♦ Mental illness
- ♦ Nutrition
- ♦ Obesity
- ♦ Personal care and hygiene/dental care
- ♦ Public health
- ♦ Physical fitness
- ♦ Ribbon Week/Toolkit
- ♦ School Health Councils
- ♦ School lunch
- ♦ School nurses
- ♦ Stress control/emotional illness
- ♦ Substance abuse
- ♦ Teenage pregnancy/sexual responsibility
- ♦ Vision/hearing/Scoliosis screenings
- ♦ Youth and teen suicide/Suicide
Prevention Toolkit



Individual Development

The mission of the Utah PTA Individual Development Commission is to assist parents, teachers, and PTA leaders in building future leaders, through art and music education, character development, and programs that build self-esteem for all children; to take positive action to further the Purpose of PTA in promoting the welfare of children and youth at home and at school; and to promote programs which benefit and strengthen arts and cultural education through parental involvement.

On a local level, the programs the commissioner will cover are determined by their executive board based on the needs assessment, which is done at the beginning of the year. Some of the ideas could include:

- ♦ Art and Humanities Month (October)
- ♦ ArtWorks for Kids!
- ♦ Artist in residence
- ♦ Character development
- ♦ Citizen/character/holistic education
- ♦ Cultural arts
- ♦ Dance in Your Schools Month - NHSDA (March)
- ♦ Life skills development
- ♦ Music in Our Schools Month (March)
- ♦ National Art Day (October 25th)
- ♦ National Poetry Month (April)
- ♦ Reflections
- ♦ Self-esteem
- ♦ Values training
- ♦ Youth Art Month (April)



Safety

The purpose of the Utah PTA Safety Commission is to advocate for children and youth in order to provide a safe environment at home, at school, and in the community; to involve parents, teachers, students, and community in safety issues; and to develop and implement programs that educate and inform to meet the needs of your community in safety issues.

On a local level, the programs the commissioner will cover are determined by their executive board based on the needs assessment, which is done at the beginning of the year. Some of the ideas could include:

- ♦ Alcohol-Related Accidents/DUI/Impaired Driving
- ♦ Bicycle safety
- ♦ Bullying/hazing/sexual harassment/cyber bullying
- ♦ Character development
- ♦ Child restraints/seat belt safety
- ♦ Club drugs and other designer drugs
- ♦ Crime prevention
- ♦ Digital Wellness
- ♦ Emergency preparedness
- ♦ Fire safety
- ♦ Firearm safety
- ♦ Gang activity
- ♦ Helmet use
- ♦ Internet safety
- ♦ Personal safety programs
- ♦ Personal safety of kids/missing and exploited children/human trafficking
- ♦ Playground safety
- ♦ Poison awareness
- ♦ Pornography
- ♦ Raves
- ♦ Safe schools/violence prevention
- ♦ Safe walking routes/pedestrian safety
- ♦ Satanic cults
- ♦ School bus safety
- ♦ School safety
- ♦ Seat belt safety
- ♦ Sexual harassment and sexual violence affecting students
- ♦ Traffic safety
- ♦ Vandalism/graffiti



Student Leadership

On the secondary school level, PTA expands to include students. Students are encouraged to become members, turning PTA at the school into PTSA. Local PTSAs include students in leadership activities and events, and should encourage students to advocate for themselves with a focus on leadership, positive behaviors, and service. The following areas could help focus their efforts based on the needs at your school:

- ♦ Alcohol/drug/tobacco education
- ♦ At-risk students:
 - Eating disorders
 - Gang prevention
 - Nutrition and physical fitness
 - Runaways/street kids
 - Teen suicide
- ♦ Bullying/hazing/sexual harassment
- ♦ Character education/values training
- ♦ Citizenship
- ♦ College/career readiness
- ♦ Driver education/novice drivers
- ♦ Healthy relationships
- ♦ Inclusion
- ♦ Internet safety/cell phone usage
- ♦ Parent/family involvement
- ♦ Peer mentoring
- ♦ Safe schools
- ♦ Service learning
- ♦ Student leadership
- ♦ Teenage pregnancy/sexual responsibility



PROGRAMS AND RESOURCES CREATED BY PTA FOR PTA

While there are many programs that PTAs can use, the following programs have been created by National PTA and Utah PTA. They have been designed to help PTAs build their community and provide support to parents and families for specific issues they are facing.

PTA Take Your Family To School Week Occurs during a designated week each February

PTA Take Your Family to School Week is a way to attract families to your school. Invite family members to step away from their daily grind and into the school during PTA Take Your Family to School Week. This special week is designed to connect families with their child's school experience, and hosting PTA Take Your Family to School Week events will help strengthen the parent-school partnerships throughout the year.

By planning organized activities for families at the school:

- ♦ Parents gain a new perspective on their children's school day.
- ♦ Teachers build positive partnerships with parents.
- ♦ Children know that their family cares and values education.
- ♦ Schools build an excellent reputation in the community as an open welcoming place for families.
- ♦ Studies show that a child's academic performance increases when their parents become involved in their education.

Ideas for PTA Take Your Family to School Week:

Open Gym Day: Get In The Game!

- ♦ Set up for volleyball, softball, kickball, or basketball on the school grounds.

Family Food Functions:

- ♦ Host mealtime opportunities with options like "Guests and Goodies" or "Parents and Pastries."
- ♦ Evening meals: ethnic pot luck, barbecue, or indoor picnic where families bring food.

Wall of Fame: Who's Who at the School

- ♦ Students interview teachers and adults at the school. They can use quotes, photos, pictures, and facts for a "Wall of Fame."
- ♦ School Lunch Together.
- ♦ Parents go through the lunch line with their student and eat lunch together.
- ♦ Families contribute artifacts that highlight the history and diversity of all the members of the school's community.



National PTA School of Excellence

National PTA School of Excellence recognition program opens the lines of communication and critical thinking within school communities to make data-driven decisions that yield positive, long-term results.

National PTA School of Excellence is a recognition program that supports and celebrates partnerships between PTAs and schools to enrich the educational experience and overall well-being for all students. By enrolling in this program, your PTA and school administrators are making a year-long commitment in identifying and implementing an action plan for school improvement based on [PTA's National Standards for Family-School Partnerships](#) and [Transformative Family Engagement](#).

Those that exhibit improvement are honored as National PTA Schools of Excellence, a distinction that spans two years. Honorees receive celebration tools and automatic consideration for the [Phoebe Apperson Hearst Award](#) and a \$2,000 grant for their school. PTAs are encouraged to renew their designation each year, or every other year, to continue to build on their momentum.

Your School of Excellence designation will help attract new, action-oriented PTA members who want to focus on the issues that affect our children the most. And being a National PTA School of Excellence will open the door to other honors and opportunities for your school.

Enrollment is open June 1 to October 1 each school year. To find more information and to enroll, visit: [PTA.org/Home/Programs/National-PTA-School-of-Excellence](https://pta.org/Home/Programs/National-PTA-School-of-Excellence)



Battle of the Bands

Battle of the Bands (BOB) is an official Utah PTA program for PTSAs.

Utah PTA's Battle of the Bands is the only PTA program like it in the country. Beginning in 2002, a competition between high school bands was created. In its current form, there are three levels of competition.

School Playoffs

One band representing each school will move on to the multi-region competition. Each school that has more than one band applying to compete will hold a school competition. This will be run by the school PTSA president or BOB Chair. All school winner applications will be forwarded by the school PTSA president or BOB Chair to the region director or chair in charge of their multi-region competition by March 1.

Multi-Region Competition

Multi-region competitions will take place between March 1-31. The region director or chair will be in touch with all school winners with the date, time, and place of the multi-region competition. Three bands from each multi-region competition will advance to the state BOB. Each multi-region will decide which three bands will advance, some send first and second place and then the audience favorite, and some send the top three place bands. The multi-region competition winner's application will be sent on to the Utah PTA Student Leadership Commissioner by the region director or chair. Multi-region entries due to Utah PTA by April 1.

State Competition

The state Battle of the Bands will include the three entries from each multi-region competition and may have other entrants through areas that may not have a multi-region, or there are other possible wild card entries. State BOB has traditionally been held around the end of April or beginning of May.

Rules are updated each year, so for a complete packet with rules and forms go to our website:

UtahPTA.org/Battle-Bands



November Military Family Month

Concert and Essay Contest

Attention All PTA Families

Utah PTA and Utah National Guard Celebrate Military Family Month
With a Concert Held Around Veterans Day Every Year.

Essay Contest

Utah PTA, in partnership with Utah National Guard, is also holding an essay contest for military families! The three winning students from elementary school, middle school/junior high, and high school from military families will be honored at this concert and receive a valuable prize!

A military family is one that has father, mother, sister, or brother who has served or is presently serving in the Active, Reserve, or National Guard (Army, Navy, Air Force, Marine Corps, and Coast Guard). If children live with guardians who are presently serving, they are also included.

The theme for the essay contest is “Why I Am Proud of My Veteran!” The essay must be no more than 500 words. You can email or send the essay to Utah PTA Military Family Specialist at MilitaryFamilies@UtahPTA.org. Word format is preferred. The article can be sent anytime before the deadline. **The articles must be in by the due date listed at UtahPTA.org/Veterans-Day-Concert-Essay-Contest.** If you have any questions or need more information please contact:

Utah PTA Military Families Specialist

MilitaryFamilies@UtahPTA.org

5192 S. Greenpine Drive

Salt Lake City, UT 84123

Phone: 801-261-3100

Fax: 801-261-3110



Red Ribbon Week

Red Ribbon Week is generally held the last full week in October.

In many schools, PTAs plan the Red Ribbon Week activities. Utah PTA in collaboration with prevention experts created a Red Ribbon Week Toolkit.

This toolkit is meant to be a helpful guide when planning Red Ribbon Week activities. Included in this kit are ways that adults can engage students in effective drug prevention messaging and activities that are based on prevention science and research. The categories and themes are meant to be guides in assisting adults to develop activities during Red Ribbon Week that will target their individual communities, schools, and students as needed. Activities are separated out by ages (elementary, secondary, or both) and include instructions, templates, and resources needed for implementation. Feel free to adjust activities and themes as needed.

To access the Red Ribbon Week Toolkit, visit: UtahPTA.org/Files/Docs/Red%20Ribbon%20Week%20Toolkit.pdf



Suicide Prevention Toolkit

In a time when suicide is the leading cause of death among Utah youth, it is more important than ever for families, educators, and community members to be educated about suicide and suicide prevention. This evidence-based toolkit has been created by prevention specialists in collaboration with Utah PTA with a singular goal in mind: to help every child in Utah. It contains a combination of upstream, midstream, and downstream approaches designed to help children of all ages in their homes, at PTA activities, in the classroom, and more.

It is our hope that each PTA/PTSA will have a prevention specialist who can help implement these ideas throughout the year into things you are already doing, adding a prevention piece to as many activities as possible in order to keep the conversation going.

The activities suggested in the “School Support” section align with the Utah State Board of Education Core Standards for health and are designed to be used by educators and others in the classroom.

Activities are separated by ages (elementary, secondary, or both) and include instructions, templates, and resources needed for implementation. Feel free to adjust activities as needed.

To access the Toolkit, visit: UtahPTA.org/Suicide-Prevention-Toolkit



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UTAH REFLECTIONS ONLINE GUIDE

Complete training materials are available at UtahPTA.org/Ref.

Note to PTA presidents: Reflections is now 100% online and easier than ever to run. Open communication between local schools, councils, and regions is essential to keep the program running smoothly.

Schools must be in good standing by December 1 of each year or their entries will be excluded from participating in Reflections at the state level. Please make sure that your membership dues are paid and that your bylaws are current or renewed. Bylaws take time to renew because you are required to post them for 30 days.

Please provide your Reflections Specialists with contact information for your council/region specialists, including names, phone numbers, and email addresses. You also need to share contact information for your specialists with your council/region specialists at the earliest possible date so they will not miss out on trainings and deadline information. Sharing and using contact information between the levels is essential. Also, please provide your specialists with the information needed to register with National PTA, which includes your unit ID number and bylaws expiration date.

GETTING STARTED

1. Become an Admin for Your School in Utah Reflections Online.

- ♦ Reflections is run through **Utah Reflections Online**. To manage your school, you will need to designate at least one person to be your school's admin.

Admin access should be set up by the level above you, but can also be set by the previous admin(s) for your school. If you are having trouble finding out who your admin is for the next level, please email Reflections@UtahPTA.org and include your school name.

- ♦ When you are set as an admin, if you did not already have a Utah PTA account, you will receive an email instructing you to create a password. You will then have access to log into **Utah Reflections Online** at UtahPTA.org/Ref. If you already had an account, you will not receive an email. Individuals who have registered for convention, online training, or other Utah PTA programs or who have judged Reflections likely already have Utah PTA accounts.
- ♦ Once you log into the system, click on the red Reflections Admin tab. You may now manage your unit, entries, and judging. Before you launch your program, delete any admins who are no longer involved in Reflections. To do this, click on the admins tab. You will then see all the admins listed for your school. To remove an admin, click the red "Remove" button to the right of the name.
- ♦ Trainings for **Utah Reflections Online** can be found at utahpta.org/ref.



2. Register Your PTA for Reflections

- ♦ Register with National PTA at [PTA.org/Reflections](https://pta.org/Reflections). All schools, councils, and regions must register by November 1. This is not the same thing as being assigned as an admin for Utah Reflections Online. Registering helps National PTA collect data to monitor and improve the program.
- ♦ Click on “Register with National PTA.”
- ♦ You will need your school name, address, eight-digit PTA ID number, contact person, email, and phone number. For the contact person and phone number, please put the Reflections Specialist’s information and not the school’s.
- ♦ You will see a confirmation screen, but will not receive a confirmation email.

** Registering with National PTA will not make you an admin for your school. They are two separate processes.*

3. Organize and Plan

- ♦ Many hands make light work. Recruit others to be on your Reflections Committee. Back-to-school night is a great time to put out a sign up sheet.
- ♦ Join the Utah PTA Reflections Facebook Group. This valuable resource will connect you with Reflections Specialists from all levels of the program.
- ♦ Find judges. Remember judges should not be from your school and should have some knowledge of the category they will be judging.
- ♦ Dates to remember: When are entries due to local schools? When are entries due to council? When are entries due to region? At the local level, you get to choose your own deadline. Find out now when the deadline is for the next level and set yours about a month before that date. This will give you ample time for checking entries, judging, scoring and recognition.
- ♦ Every school is required to use **Utah Reflections Online** found at UtahPTA.org/Ref.
- ♦ Consider creating a dedicated Reflections email for your school and assigning that email as an admin. This way your school will always have online access and will only need to change the name and phone number associated with the account when a new specialist takes over the program.
- ♦ Entries cannot be uploaded for your school without an admin being assigned. Any admin can add new admins for their level or below. Multiple admins are allowed.

The complete Local Leader’s Guide, rules, training videos, and everything else Reflections can be found at UtahPTA.org/Ref.



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UTAH PTA LEADERSHIP AWARD

L.E.A.P. Award Information

Leadership, Excellence, and Partnersshipping (L.E.A.P.)

Leadership is often defined as “the art of getting or inspiring people to do something.” It is not the same as management, which is associated with accomplishing a task in an effective and efficient manner. A leader must often use different leadership styles, depending on the situation and group. People skills are a basic necessity in good leadership. A successful leader will involve everyone in the group in any decision-making that will affect them.

It is the desire of Utah PTA to recognize our committed volunteers. Within the membership of Utah PTA are leaders who steadfastly serve in various PTA positions and volunteer thousands of hours for the benefit of the children of Utah.

You can nominate any PTA leader for a L.E.A.P. Award. Here are a few facts:

- ♦ A person can complete one, two, or even three levels in one year.
- ♦ Someone else (like a president) can fill out applications for other people.
- ♦ All LEAP Awardees will be recognized in the Leadership Convention program and with a LEAP pin with level indicator.
- ♦ Many regions and councils also recognize awardees at spring trainings.
- ♦ Any PTA board member can complete any level of the L.E.A.P. Awards. Nominate a vice president, chairman, and committee member today.

The application is now an online form. The link to the application for the L.E.A.P. Award is on our website at: UtahPTA.org/Leadership-Excellence-Partnersshipping-Leap-Awards

Utah PTA recognizes our committed volunteers with our L.E.A.P. Award



UTAH PTA GOLD STAR AWARDS

The Utah PTA Gold Star Awards were created to recognize the outstanding PTA and PTSA units in our state. Utah PTA designates PTA/PTSA units that have done all of the required items and the additional elective activities (about 20 items total) as Utah PTA Gold Star PTAs and PTSAs. There are four levels: Local PTA, Local PTSA, Council PTA/PTSA, and region PTA.

If you follow best practices for running your PTA/PTSA and if your PTA/PTSA is in good standing, you will most likely qualify for this award. We recognize that it may also be overwhelming to know how to do everything that needs to be done to be a PTA/PTSA in good standing. The award requirements are designed to help PTA/PTSA leaders know the items they can focus on to fulfill their roles in helping their students and their school communities.

Each Utah PTA Gold Star Designee will receive a framed certificate to display in their school and will be recognized and celebrated at Utah PTA Leadership Convention. We will also highlight designees throughout the coming year as we promote the program.

All local PTAs, PTSAs, councils, and regions should apply! Each level has its own set of requirements. Each level's requirements and online application will be announced at the beginning of the school year. Information will be available online and through your region director.

All requirements, the online application and other tips can be found at: UtahPTA.org/Gold-Star-Leadership-Awards.



UTAH PTA AWARDS APPOINTEE

To run a successful Awards Program, it is recommended that each local PTA and each council and region PTA have an Awards appointee. This position should be appointed by the PTA president, council president, or region director.

Awards Appointee duties at the local level

- ♦ Attend Utah PTA Leadership Convention training.
- ♦ Review all awards available.
- ♦ Set up a committee to choose nominations.
- ♦ Interview candidates.
- ♦ Choose winners.
- ♦ Write the awards applications for submission.
- ♦ Honor winners at local level awards ceremony. This can also include some creative awards that you could give from your local PTA only.
- ♦ Submit your winners to the council level by the council due date.

Awards Appointee duties at the council level

- ♦ Attend Utah PTA Leadership Convention training.
- ♦ Encourage all local PTAs to have an awards appointee.
- ♦ Train local awards appointees and encourage active participation.
- ♦ Remind local PTAs regularly of council awards due date.
- ♦ Encourage every school to participate.
- ♦ Set up a committee to review all awards submitted to council.
- ♦ Review awards.
- ♦ Choose winners.
- ♦ Honor winners at council awards ceremony or council meeting. This can also include some creative awards that you could give on the council level.
- ♦ Submit winners to region by the region due date.

Awards Appointee duties at the region level

- ♦ Attend Utah PTA Leadership Convention training.
- ♦ Train all council awards appointees and encourage active participation.
- ♦ Set up a committee to review all award submissions to region.
- ♦ Choose region winners.
- ♦ Honor all region winners.
- ♦ Submit winners to Utah PTA by the due date.



AWARDS APPOINTEE TIME LINE

May

- ♦ Have end-of-year recognition for your PTA board, etc.
- ♦ Attend convention and any other trainings
- ♦ Form awards committee for next year with four to six people
- ♦ Have training for committee
- ♦ Review awards with committee and have them begin to think about nominations for next year
- ♦ Plan awards program for your school and PTA board

June-July-August

- ♦ Have a writing workshop to learn how to write awards applications
- ♦ Review award applications from previous years at the Utah PTA office
- ♦ Advertise to parents, teachers, and community council members to submit applications for awards at utahpta.org/awards-information

September

- ♦ Give reports each month at your PTA board meeting on:
 - People chosen for different awards
 - Outstanding volunteers spotlighted each month
 - Recognition given each month
- ♦ Start taking nominations for your local awards recognitions

October-November

- ♦ Choose awards recipients and begin the application writing process
- ♦ Have a local recognition for your winners

December

- ♦ Awards applications open

January

- ♦ Submit your winners to council
- ♦ Council collects awards from all schools
- ♦ Have a council recognition for winners
- ♦ Council winners due to region

February

- ♦ Have a region recognition for winners

March

- ♦ Region winners due to Utah PTA
- ♦ State winners will be chosen and announced

April-May

- ♦ State Award winners recognized



UTAH PTA AWARDS

Purpose

Purpose: The Utah PTA Awards Program is designed to offer greater opportunities for recognizing those who devote their time and energy on behalf of children.

Recognition is a key factor in any successful business/organization as well as a key factor in retaining quality volunteers. Awards and recognition are a necessary priority in PTA at all levels. You will find that awards and recognition will provide your PTA with many great benefits.

Utah PTA is here to help assist you and your school in providing opportunities to recognize greatness at your school. While there are endless ways this can be done, we are happy to provide you with this meaningful opportunity.

The concept behind the Awards Program is that our thanks be heartfelt and genuine, and not necessarily extravagant.

PROGRAM OVERVIEW

Local PTA

Local PTAs will submit award nominations online at UtahPTA.org/Utah-PTA-Awards. Local PTAs should honor local winners. Conducting a local awards program is optional, but we have found that local PTAs who also conduct their own awards program/recognition for the awards that were selected to be written and submitted to council add additional meaning to the process. This allows you to honor awards recipients within the school and community who selected them.

Council PTA

Councils will select winners in each award category. Councils should honor council winners. The council winners will be advanced to the region where region level winners will be selected. Regions will determine the number of council winners that can be sent onto the region level.

Region PTA:

Regions will select **one winner** in each of the award categories to advance to state (for larger regions with associate directors they can select one additional winner per associate in each category).



AWARDS OVERVIEW

UTAH PTA AWARDS

Utah PTA Advocacy Award

This award is given to a **local PTA** or individual for excellence in their efforts to support and speak on behalf of children and youth.

Utah PTA Development Award

This award is given to a **local PTA** for excellence in program and/or leadership development. This award is encouraged for programs in schools that are in the first five years of their program – developing and improving the program. Remember, this is for a program not an individual.

Utah PTA Engagement Award

This award is given to a local PTA for excellence in the area of engagement. This can include engaging the community, businesses, faculty, parents, etc. Remember, this is for a program not an individual.

Utah PTA Outstanding Elementary Educator

This award recognizes a professional educator currently working with students in grades preschool to 5th or 6th Grade (depending if 6th Grade is in your elementary or secondary school). State winners will be selected based on their relationship with students, parents, PTA, and the community.

Utah PTA Outstanding Secondary Educator

This award recognizes a professional educator currently working with students in grades 5th or 6th grade (depending if 6th grade is in your elementary or secondary school) to 12th Grade. State winners will be selected based on their relationship with students, parents, PTA, and the community.

Utah PTA Outstanding School Administrator Award

To recognize an outstanding school administrator currently working with students on an elementary or secondary level. This can include assistant principals.

Utah PTA Outstanding Support Staff

This award recognizes any school support staff (custodians, secretaries, lunchroom staff, bus drivers, aides, etc.) currently working in schools in grades preschool to 12th grade. State winners will be selected based on their relationship with students, parents, PTA, and the community.

.....



Utah PTA Outstanding Volunteer Award

This award is given to a volunteer who renders volunteer service to children through the education system and is making a positive difference. Nominees will be considered on the basis of quality of volunteer commitment.

Utah PTA Spirit of Inclusivity

This award recognizes an outstanding PTA/individual who has organized an inclusivity event/activity using the PTA National Standards for Family School Partnerships. Examples: Welcoming families into the school community; communicating effectively; supporting student success; speaking up for every child; sharing power and collaborating with community; involving minority parents in PTA. If an individual, they must be a member of the PTA and exemplify the PTA Purpose and Mission.

Utah PTA Spirit of PTA Award

This award recognizes an outstanding volunteer who has given consistent and outstanding service through PTA. This person must be a member of the PTA and exemplify the PTA Purposes and Mission.

NATIONAL PTA AWARDS

Be sure to check the National PTA Website ([PTA.org](https://pta.org)) to apply for National PTA Awards.



AWARDS Q AND A

General Questions

Q: How many categories are there for awards?

A: There are 10 different categories: Volunteer, Spirit of PTA, Administrator, Elementary and Secondary Educator, Support Staff, Inclusivity, Advocacy, Engagement, Development.

Q: How many awards can each school submit?

A: Each school can submit one award per category except for the educator categories. You may do one of the two based on what level of school you are.

Q: How does a school choose who to nominate for the awards?

A: There are a few different factors that you will want to take into consideration.

- ♦ The first one is, do you have someone that is willing to write the award(s)?
- ♦ If you have more than one name submitted for a specific category then it is best to discuss the names among your board and make a decision together.
- ♦ Take into consideration the details of the person or program. Remember there is always the next year.

Q: Who can write the awards?

A: Anyone can. If you have an awards chair it is great to start with them and see which ones they would like to write. It is always best to have someone who knows the program or the individual well. They are able to put a lot of details and specifics in the award. There might be someone who just reaches out to the PTA and asks if there is a certain type of an award to nominate someone they think is doing great things. If you don't have anyone entered for that specific award it is a great way to get others involved.

Q: What are the levels the awards go through?

A: There are four levels for the awards (this may vary a little bit depending on your area):

- ♦ **Local:** Each school can submit awards.
- ♦ **Council:** Generally a council is made up of around eight to ten schools (in many areas schools that feed into a specific high school). Each council can only submit so many onto to region. This varies depending on the area.
- ♦ **Region:** This is generally a district area. Each region can submit one per category unless they are a larger district, then they can submit two to state.
- ♦ **State:** This is the final place your awards will be submitted. State will award a set amount per category state wide. This varies a little bit each year, but generally two to five per category.



SPECIFIC QUESTIONS

Q: What things are required?

A: Each award has selection criteria and technical requirements associated with it which have to be met for the award to be judged and continue on. It is very important that these are carefully read and followed so that every award in a specific category has the ability to be judged equally.

Q: How important is the supplementary material?

A: It is very important. It is a key factor in differentiating all of the submissions received. Very few awards have won at state without supplementary material. Supplemental materials help create a more complete picture of the recipient through pictures, programs, letters, etc. Using it will allow you to build a stronger presentation.

Q: What things should I consider for supplementary material?

A: The options are **endless**. You can attach letters of recommendation, pictures, time lines, programs, articles, etc. The only thing that the supplementary material can't be is a continuation of the written award.

Pictures make one of the biggest differences. They provide a connection for judges and help differentiate all of the outstanding submissions received. You can put more than one picture on a page. Be creative – you can create a supplementary page like a newsletter or keep it very simple.

Q: How many total sheets can the supplementary material be?

A: Supplementary material can contain at the most three pages of material. We want to keep all of the awards the same as far as how much can be submitted.

Q: What things are you looking for when judging the awards?

A: Everything that is listed on the award application has points when being judged. It is encouraged to cover all of the different points that are on the award. It should be more of a natural thing when writing the award, because overall the people and programs you are writing about have all of the things that the award is looking for. It is important to note that only one supplementary item is required to continue on and to be judged, but up to three supplementary pages will have a possibility for points.

On each award application there is a section that says “Selection Criteria.” Besides meeting the requirements and points for each of the supplementary pages the main part of the points is based off of the selection criteria.



Other Stuff

General Items

- ♦ The requirements and technical requirements are the items that will be checked prior to judging further.
- ♦ You will be asked to indicate if you would like the PTA president, the award writer, the principal, or the nominee notified first if the nominee wins at state.

Specific Items

- ♦ Remember to write about the program and not the chair for the awards in categories of Engagement and Development.
- ♦ Spirit of Inclusivity can be about a person or a program.
- ♦ Administrator can recognize principals and assistant principals.

The Process for Notification of State Winners

- ♦ We try to send out notification between the third and fourth week of March. We will notify the person listed on the award: “If nominee wins at region/state, who would you like contacted first?”
 - Included in that email will be the region director so that they know that someone in their region won.
- ♦ **Week Later:** Notify the winner from state that they won (allowing locals time to notify award recipients before an email is received).
 - Included in that email will be everyone that has contact information on the entry: Principal, PTA president, person who wrote the award, etc.

Answers to Questions Throughout the Year

- ♦ UtahPTA.org/Utah-PTA-Awards
- ♦ Your council/region generally has someone that can answer questions or help you
- ♦ If you can't find the answers on the website or through your locals, councils, or regions you are welcome to contact the state awards specialist at Awards@UtahPTA.org.



WRITING AWARDS 101

Don't Put It Off: Meet with your board and your administrator and select a candidate as soon as possible.

Know Your Subject: Meet with your candidate. Interview them, have them write down every program they have been involved in, not only with the school, but within the community, and other extracurricular activities. The more material you have to work with, the better your award will be.

Follow the Rules: The applications are clear about what the requirements and the technical requirements are. Make sure you complete the application.

Writing the "Report": Have fun, but think of it like writing a school report. You will want to write and then have an editor review it and fix things. Don't be afraid to use big words, words with emotions, words that describe.

Example: Terri spends a lot of time at our school and has started many programs OR Terri gives freely of her excitement, passion, time, and energy to the programs at our school and has pioneered many of the existing programs that are in place today.

Use Quotes: Get quotes from parents, students, peers, and administrators. They are very powerful in the context of the award. *For example:*

- ♦ Since Mr. Hunter started the TSA program in 2018, Oak Canyon Junior High students have consistently received honors on both state and national levels. The following are comments from former students:
 - "When taking on projects or challenges for competition in TSA, Mr. Hunter always encourages me to sign up for more than I normally would. This helped me to push beyond my predefined limits and enables much growth and discovery." (Aaron M.)
 - "What Mr. Hunter did was way outside of his responsibilities; he would spend his time for the good of his students. He is serious about helping others achieve their goals." (Josh M.)

Get Recommendations: You can use letters of recommendations as part of your supplementary materials. It's nice to get the letter of recommendation and quotes from a variety of sources.

Supplementary Materials: Supplementary materials are required, but there is a minimum and a maximum for all of the awards. It's best to maximize the information, pictures, programs, etc. Be creative and utilize your space. If you have more information than you can fit in the write-up, utilize your supplementary space to highlight things that you were unable to include in the write up.

Most Important – HAVE FUN! If you implement these simple tips, use one or two of them – whatever you would like, include the things that are requested on the cover sheets and have fun writing the awards and learning about the fantastic people and programs you have in your schools – your awards will do well.



UTAH PTA AWARD SUBMISSION GUIDELINES

More information on Utah PTA awards as well as access to the online submission forms can be found at UtahPTA.org/Utah-PTA-Awards.

Requirements for all awards:

- ♦ Local PTA is in good standing
- ♦ If the application is for an individual, they must be a member of PTA and exemplify the PTA Purpose and Mission
- ♦ Nomination essay up to 1000 words (about the length of two typed single spaced pages)
- ♦ Supplementary material:
 - One supplementary item is required
 - There are points for each supplementary item up to three items
 - Each supplementary item should be no more than one page long
 - These materials may include photographs, articles, letters, program materials, or other items

Advocacy

Categories that this award can be written for include legislative activities; organizing local community members to communicate with policy makers, businesses, health department, school board members, local school administration; educating others about PTA priorities: general membership, legislators, board members, elected officials, school administration, "Meet the Candidates Night," and other advocacy programs.

Please include details for the following in the nomination essay:

- ♦ Goal of the program/projects
- ♦ Describe the programs/projects and include steps used to plan, coordinate, and conduct the program/project
- ♦ Describe how you evaluated the programs/projects
- ♦ Describe the impact the programs/projects have had particularly on students as well as others

Development Award

Suggested areas that this award can be written for (not limited to): leadership development with students, board members, parents or others, curriculum enrichment, parent education, health, safety, family issues, or the arts.

Please include details for the following in the nomination essay:

- ♦ Goal of the program/projects
- ♦ Describe the programs/projects and include steps used to plan, coordinate, and conduct the program/project
- ♦ Describe how you evaluated the programs/projects
- ♦ Describe the impact the programs/projects have had particularly on students as well as others



Engagement Award

Categories that this award can be written for: parental engagement, student engagement, business partnerships, membership recruitment, community engagement, and representational engagement.

Please include details for the following in the nomination essay:

- ♦ Goal of the program/projects
- ♦ Describe the programs/projects and include steps used to plan, coordinate, and conduct the program/project
- ♦ Describe how you evaluated the programs/projects
- ♦ Describe the impact the programs/projects have had particularly on students as well as others

Outstanding Elementary/Secondary School Educator

Selection criteria (please include the following):

- ♦ Nomination essay with the following details:
 - Educator's relationship with students
 - Educator's relationship with parents
 - Educator's relationship with PTA and community
- ♦ Letter from the principal as a supplementary page is required

Outstanding School Administrator

Suggested items to include (you do not need to include all of these aspects):

- ♦ Accessible to students, parents, teachers
- ♦ Aware of and supports the active participation of parents in the school
- ♦ Able to recognize the diverse needs of students
- ♦ Able to recognize and celebrate individual student achievement and effort
- ♦ Facilitates partnerships between parents and teachers
- ♦ An active participant as a member of the PTA Executive Committee
- ♦ Listens to concerns of students, parents, and teachers, and finds positive resolutions
- ♦ Provides a positive environment for students, parents, faculty
- ♦ Makes learning fun
- ♦ Looks for and finds ways to continue to make progress and improve their school

Please include details for the following in the nomination essay:

- ♦ Attributes of the principal - any items listed above
- ♦ Impact on students
- ♦ Exemplifies Mission/Purpose of PTA
- ♦ Nominee's activities



Outstanding Support Staff

Selection criteria (please include the following)

- ♦ Nomination essay with the following details:
 - Relationship with students
 - Relationship with parents
 - Relationship with PTA and community
 - Relationship with faculty
- ♦ Letter from the principal as a supplementary page is required

Outstanding Volunteer

Nomination essay with the following details:

- ♦ Describe the nominee's impact on students
- ♦ Describe nominee's activities
- ♦ Describe nominee's relationship with faculty/administrators
- ♦ Describe nominee's relationship with volunteers
- ♦ What makes this volunteer an outstanding volunteer?

Spirit of Inclusivity

Selection Criteria (Please include details about at least three of the following items in the nomination essay):

- ♦ Nominee must organize an activity and seek the involvement of minority (definition: the smaller number or part, especially a number that is less than half the whole number) parents, leaders, or organizations in their community.
- ♦ Include details of the activity so that other schools could implement the program.
- ♦ Nominee mentored or assisted in the appointment/election of a minority to a leadership role in the PTA.
- ♦ Nominee's result has a positive impact on students/school.
- ♦ State the goal of the program/projects and show how you used the six National Standards for Family School Partnership which are: Welcoming All Families into the School Community, Communicating Effectively, Supporting Student Success, Speaking Up for Every Child, Sharing Power, and Collaborating with Community.

Spirit of PTA

Selection Criteria (Please include details about all of the following):

- ♦ Nominee has given at least two years of service to children through the PTA
- ♦ Nominee must exemplify the PTA Mission and Purposes
- ♦ Nominee is an example of quality leadership
- ♦ Describe how the nominee's activities and accomplishments are superior
- ♦ Nominee has a positive impact on student/school





everychild.one voice.

Arts Education & Supplies Grants

Funds to be used in the 2023-24 school year

What is the Utah PTA Arts Education Grant?

It is a fund that supports local PTA efforts for arts education activities in their school. Funds are granted one dollar for each dollar (1:1) contributed by the Local PTA unit. Amount determined by the Utah PTA Arts Education Grant Committee.

Who is eligible to apply for Utah PTA Arts Education Grant?

Any Local PTA/PTSA with bylaws and membership in good standing.

What may the grant be used for?

The creation or enhancement of an existing PTA arts program or project. Musical scores, instruments, theater rights, props, scenery, and costuming, etc. Expertise to support student performances and productions. Any other art program needs. You are only limited by your imagination.

How do we apply?

Fill out and submit a Utah PTA Arts Education grant application. Application may be found online at www.utahpta.org/arts-education-supplies-grant.

When is it due?

Applications are due on March 1.

Who awards the funding?

The Utah PTA Arts Education Grant Committee comprised of parents, educators and community leaders award the grants.

When will the funds be awarded?

Funds will be available July 1 for the upcoming fiscal year.

What else is required?

The arts program must be developed and facilitated by the PTA in cooperation with the school administration.

PTAs must submit a final report form as soon as the arts program is finished or no later than June 1.

What is the Utah PTA Arts Supplies Grant?

It is a fund that supports Local PTA efforts for arts activities in their school. Funds are granted one dollar for each dollar (1:1) contributed by the Local PTA unit. This grant supports the supplies needed to run a PTA/PTSA art program and/or project. This is a separate grant. The amount of each grant is determined by the Utah PTA Arts Education Grant committee and is dependent on available funds. Recipients are determined by a drawing of eligible applicants.

Ideas for Arts Education Grants

- ⇒ A dance instructor coming to instruct and teach children areas of dance.
- ⇒ A bookmaking artist teaching children the art of bookmaking and making their own book.
- ⇒ Learn the skills of poetry and carry out a poetry contest either in writing or out loud.
- ⇒ Invite film makers to give instruction on how film is made. Have a film festival.
- ⇒ Visual artists can teach skills to create a school project. (i.e. mural of students art)
- ⇒ Have cultural groups come and teach their culture through art, dance, and music.
- ⇒ Have students write stories that can be carried out on stage or a puppet play.
- ⇒ Have storytellers come and share their expertise. Students can write stories and do the same.
- ⇒ Invite music artists to share their music. Have students create musical instruments.
- ⇒ Create comic or cartoon stories of issues facing children today.



Why does art matter?

1. Art promotes creativity – The world needs more and better thinkers
2. Art encourages neural connections – employs all of the senses
3. Art builds fine motor skills
4. Scribbling is a precursor to writing
5. Art develops problem-solving abilities – making choices, confidence, flexible thinkers
6. Art helps kids understand themselves and their world
7. Art helps kids connect

- The Artful Parent | www.artfulparent.com -



Art matters because it illustrates the human experience—the wonder of it, the bewilderment of it, the whimsy of it, and so much more. We would not be connected so deeply without the existence of art.

- Kathleen Dinsmore

The arts matter because they allow us to express ourselves and illustrate the world around us in a different light, helping us to gain understanding, build communities, and give hope.

- Kelli Rogowski

The arts matter because they allow an individual a platform to express their unique creativity to/with the world.

- Monica Waters



Art is, the works of our hands and feet, the thoughts and innovations coming from our mind, and the inspiration coming from our spirit and our soul. It is how we survive.

- Deborah Washington



The arts matter because they allow you to experience different ways of seeing and thinking about life.

- Don Ball

The arts matter because we matter, and our stories matter. We are moving miracles, walking creators engaging in a cosmic dance. The art we express is timeless.

- Mohammed Sheriff



Art Resources for Utah Schools:

Utah Department of Arts and Museums (UDAM)
artsandmuseums.utah.gov/

Utah State Office of Education (USOE)
www.schools.utah.gov/

Professional Outreach in Schools (POPS)
popsutah.org

Salt Lake City Arts Council
saltlakearts.org

Art Works For Kids
www.artworksforkids.org

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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 Arts Education & Supplies Grant(s)



Thank you for your interest in the Utah PTA Arts Education and Supplies Grants. Applications are due **March 1**. Grants will be awarded based on 1:1 matchings funds as decided by the Arts Education Grant Committee. Grant funds may be used by PTAs to collaborate with the community to create and/or increase the access to meaningful art experiences. Dates may need to be modified due to complications beyond our control. Notifications will be sent through Region Directors and directly with applicants as available.

Planning Your Program

Please note that you are applying for money to be used in the following academic year. Successful applicants will be informed in **May** and two-thirds of the money will be disbursed **July 1** with the final third (1/3) disbursed upon completion of the project and a final report given. As you plan, please involve your President-elect or other ongoing PTA officers who will implement the plans the next year. Please pick an area that relates best. These areas include Dance, Theatre, Music, Visual Art, Media Arts, and Literary Arts. Remember this is to be a PTA project, not a school project, nor an equipment purchase, nor funds for the purpose of solely purchasing art supplies.

As you plan your program and budget, you may find useful information on the Utah Arts & Museums website. Their website is: artsandmuseums.utah.gov/. Here you can find a wealth of information about artists, usual salaries, and also other grants for which you may wish to apply.

Areas For Grant Consideration (Consideration may overlap multiple areas)

Most ideas below could support creating in various Reflections categories.

Dance: Funds could be used to fund dance instructors and presenters, education of dance history, dance within the area to promote community engagement, education activities including choreography and performance, and dance projects of all sizes.

Theatre: Funds could be used for the production or presentation of traditional or classical repertoire, new plays and musicals, showcases, artist residencies, work for young audiences, experimental work, community-based work, outdoor historical dramas, and publicity.

Music: Funds could be used to bring the power of music into the lives of children through artists, engagement of music directly with students, music and movement, cultural music experiences, unconventional forms of music, composition, vocalization, and musical improvisation.

Visual Arts: Funds could be used for painting, sculpture, photography, printmaking, drawing, craft, and public art. It should demonstrate exceptional artistic exploration and meaningful thought to create a project either individually or on a larger school scale. Funds should not be intended to purchase instructional supplies and materials.

Media Arts: Funds could be used to support the development, production, and distribution of projects that demonstrate media as art. Media arts includes screen-based projects presented via film, radio, audio, video, and internet; interactive and mobile technologies; video games; and transmedia storytelling.

Literary Arts: Funds could be used to support students to write, revise, edit, publish and perform their own creative writing. This could include presenters to exhibit such media as *Poetry Out Loud* or storytelling, and then have students expound on this new knowledge through oral presentation.



Fill Out the Application

Please fill out the application form at www.utahpta.org/arts-education-supplies-grant. The available funds are limited and there needs to be a clear understanding of what your PTA would like to achieve. Applications will not be considered if matching funds are not obtained. PTA must be in good standing (dues paid, current bylaws, beginning and ending year paperwork submitted) in order to receive a grant from Utah PTA or National PTA.

The following questions will be answered during the application process:

- ✧ What are the arts education needs of the student body as determined by the the PTA?
- ✧ What are the school's PTA goals and objectives?
- ✧ Describe the arts education project for which the PTA is requesting funds and how will the project help the PTA achieve its goals and objectives?
- ✧ Describe the time line for this project including when the project starts and when it will end.
- ✧ Who and how many will benefit from participation in this project? (Grades, teachers, parents, community volunteers, etc.)?
- ✧ How will PTA measure and evaluate the impact/success of this project?
- ✧ This grant is about PTA involvement beyond writing grants and raising funds. How will parents of the school be directly involved in this arts project?
- ✧ If you are paying an artist fee, please give details about their qualifications and artistic experience. Please include a short bio and contact info.
- ✧ Has your school received the Utah PTA Arts Education Grant previously? What year(s)?

You will need to enter your budget for the project, including equipment purchase or rental, instructional materials, artist fee, travel related expenses, etc. and show matching funds. Project expenses are eligible for the Arts Education Grant and art supplies are eligible for the Art Supplies Grant. You may apply for one or both of the grants.

When filling out the budget summary, please include ALL monies you plan to spend, not only the money you are requesting from the grant.

A letter of support from the school administration concerning the planned art project is required.

Follow-up Activities

Two-thirds of the grant amount will be paid out **July 1**. The remainder will be paid after Utah PTA receives a brief evaluation and report of the completed program. The form for the evaluation and report will be sent with the initial payment.

If you have suggestions for streamlining the application and disbursement process, please share them with us at kids@utahpta.org and be sure to include "Arts Grant" in the subject line.

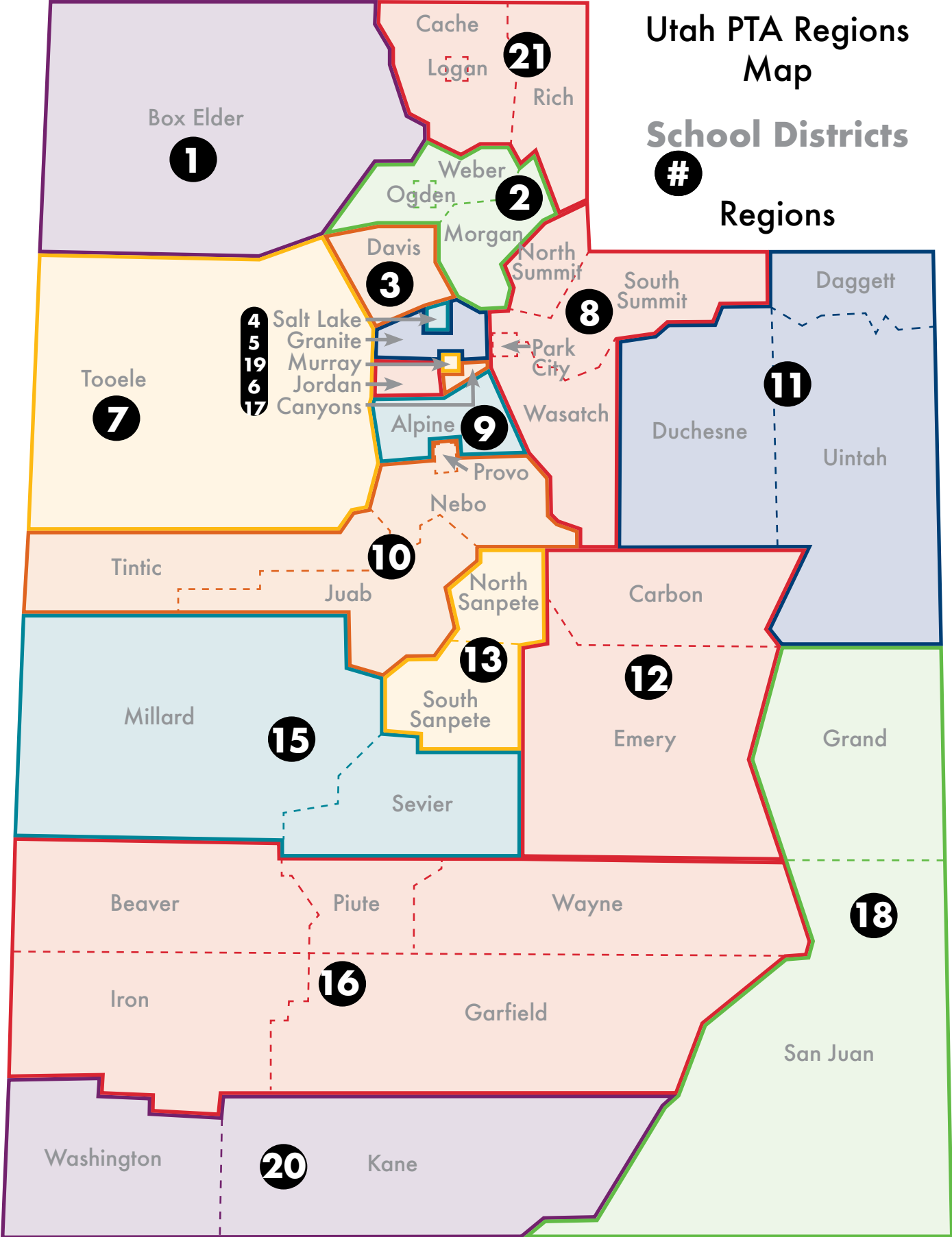
The Utah PTA Arts Education Fund receives funds from donors. You can help by contributing to the fund. Donations can be sent to: Utah PTA, 5192 S. Greenpine Drive, Murray, UT 84123-4604.

We wish you all the best as you plan and implement arts programs for our Utah children.



Utah PTA Regions Map

School Districts
#
Regions





CONNECT

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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

Alexandria, VA 22314

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Toll Free: (800) 307-4PTA (4782)

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