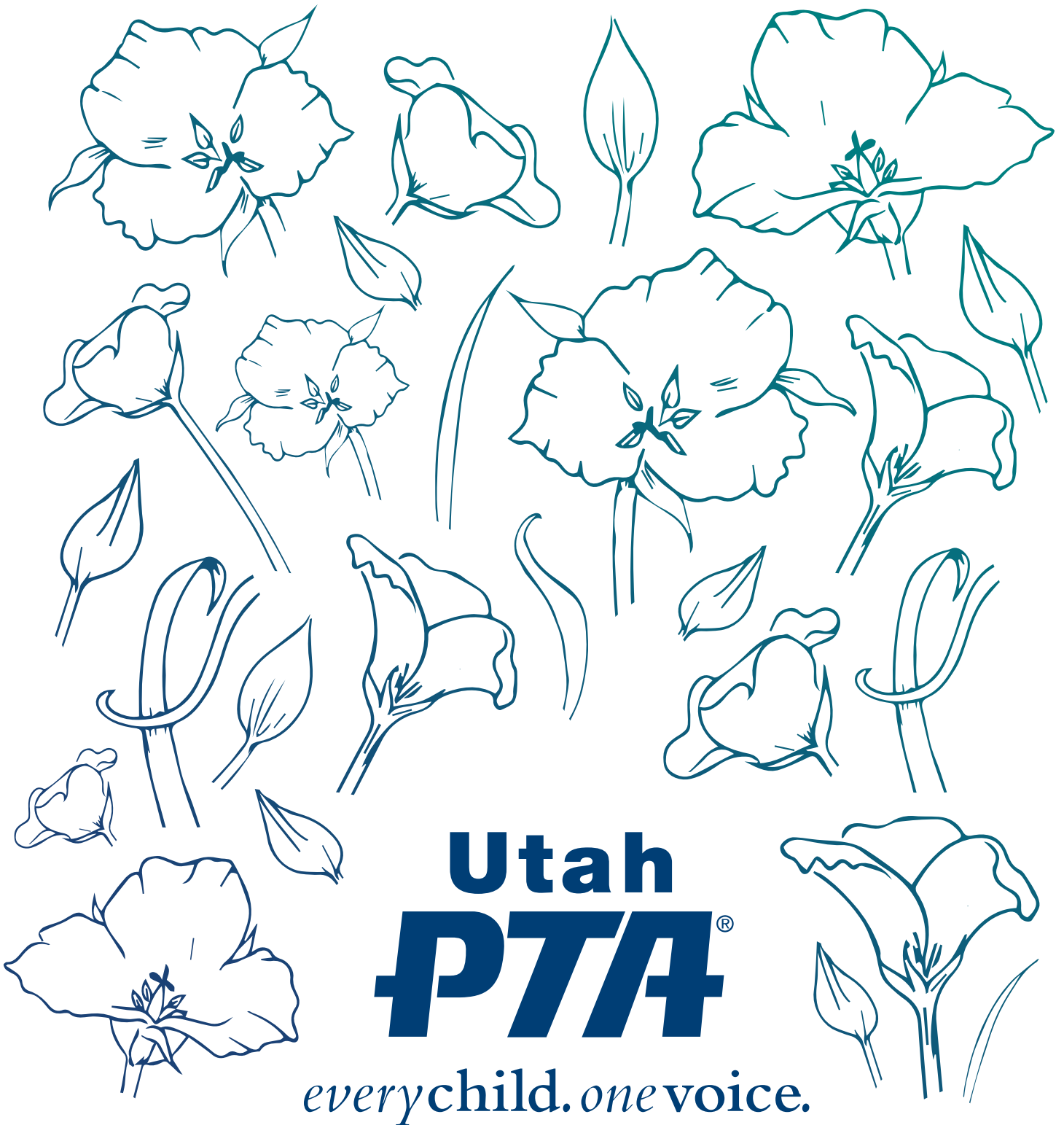


2023 UTAH PTA HANDBOOK

REGION DIRECTOR



Utah
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HISTORY OF PTA

National PTA Fact | Utah PTA Fact

1897-1920

- 1897 The National Congress of Mothers founded by Alice McLellan Birney and Phoebe Apperson Hearst
- 1898 Utah Congress of Mothers was formed by Mrs. C. E. Allen, one of Utah's delegates to the National Congress
- 1905 Resolutions endorsed federal aid for kindergartens and elementary schools and recommended salary increase for teachers
- 1906 National Congress of Mothers Magazine (forerunner of *Our Children* 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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INTRODUCTION

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

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

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

Correct Usage of the PTA Name

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

Do not use periods, hyphens, or small letters.

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

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STRUCTURE OF PTA

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

National PTA Board of Directors

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

Utah PTA Board of Directors

President, president-elect, vice presidents, directors, secretary, treasurer, administrator and teacher representatives, immediate past president, commissioners, region and associate region directors, board specialists

Region Board of Directors

Region director, associate director (where applicable), assistant region directors, superintendent(s), secretary, treasurer, if applicable

Council Board of Directors

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

Local Board of Directors

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



OVER 125 YEARS STRONG

For more than 125 years, National Parent Teacher Association (National PTA®) has worked toward bettering the lives of every child in education, health, and safety. Founded in 1897 as the National Congress of Mothers by Alice McLellan Birney and Phoebe Apperson Hearst, National PTA is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education.

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

National PTA Mission Statement

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

Utah PTA Mission Statement

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

Utah PTA Vision Statement

To fulfill the Mission, Utah PTA will:

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



Purposes of PTA

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

PTA Values

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



WHY BE A PTA SCHOOL?

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

A PTA School:

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

Utah PTA:

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



PTA LINE OF COMMUNICATION

MEMBER → LOCAL → COUNCIL → REGION → STATE → NATIONAL

NATIONAL → STATE → REGION → COUNCIL → LOCAL → MEMBER

BE A PTA PROFESSIONAL

According to the PTA bylaws, all meetings shall be governed by "Robert's Rules of Order-Newly Revised."
In addition, all board members shall:

- ♦ Abide by all PTA rules and meet all PTA deadlines.
- ♦ Ensure the confidentiality of the PTA member contact information for the use of PTA only.
- ♦ Attend all board meetings and applicable executive committee meetings.
- ♦ Notify the president as soon as possible if an emergency occurs and they are unable to attend a scheduled PTA meeting.
- ♦ Arrive on time and remain to the conclusion of the meeting except in cases of individual emergencies.
- ♦ Begin all meetings on time.
- ♦ Be allowed a 10-minute break every two hours, returning promptly.
- ♦ Turn all cell phones to "off" or "vibrate." Leave the room if you must answer a call.
- ♦ Complete preparation before or after meetings, not during meetings.
- ♦ Refrain from holding side conversations.
- ♦ Direct all comments and questions through the chair.
- ♦ Maintain professional courtesy at all times, including being supportive rather than judgmental, respecting differences of opinion, and listening to others' ideas without prejudice.
- ♦ Give feedback directly and openly in a timely fashion.
- ♦ Acknowledge problems and deal with them as they arise.
- ♦ Be prepared to present agenda items in a concise manner and focus on tasks and the process and not on personalities or hidden agendas.
- ♦ Obtain missed information during breaks out of consideration of others.
- ♦ Adjourn at the scheduled time, as per the printed agenda.
- ♦ Dress to match the dress of those also attending a meeting when representing PTA.
- ♦ Wear PTA logo items such as name tags, badges, or attire when representing PTA.
- ♦ Notify president of address, phone number, and email changes as soon as possible.
- ♦ Stay at home out of consideration for the health of others if ill and possibly contagious.
- ♦ Set meeting guidelines and expectations.
- ♦ Give proper notice of meetings and deadlines.



UTAH PTA FACTS

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

Utah PTA divides the state into 20 geographic PTA regions, each served by a region director. In large districts, the region director works with area councils. The council president then works with the local school PTA president. In rural areas, two or more school districts are under one region director. Local PTA Administrative Vice Presidents meet on a regular basis throughout the school year with council presidents/region directors. Presidents-elect and Administrative VPs may also be included in these meetings. Local PTAs also meet on a regular basis throughout the year in Executive Committee and board meetings and work with administrators, teachers, staff, parents, and students.

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

Utah PTA volunteers reported 735,543 hours of service to Utah's children in their local public schools in 2022. If this volunteer service were translated into monetary value, it would be worth \$22,029,512.85!

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

National and Utah PTA Programs

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

Conferences and Trainings

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

Utah PTA Awards and Grants

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

Utah PTA Commissioners

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

Utah PTA Specialists

Arts Grants	Military Families
Awards	Reflections
Bylaws	Resolutions
Digital Wellness	Special Needs
Diversity and Inclusivity	Technology
Family Engagement	Trust Lands
Male Engagement	



WHAT ARE THE NATIONAL STANDARDS?

The National Standards for Family-School Partnerships are voluntary guidelines to strengthen parent and family involvement on behalf of children in schools and other programs. The six standards and their quality indicators provide PTAs, schools, and communities with the components that are needed for highly effective family-school involvement programs. Add more information can be found at NPTA at <https://www.pta.org/home/run-your-pta/family-school-partnerships>

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

1 Welcoming All Families Into The School Community

Families are active participants in the life of the school and feel welcomed, valued and connected to each other, to school staff and to what students are learning and doing in class.

2 Communicating Effectively

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

3 Supporting Student Success

Families and school staff continuously collaborate to support students' learning and healthy development, both at home and at school and have regular opportunities to strengthen their knowledge and skills to do so effectively.

4 Speaking Up For Every Child

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

5 Sharing Power

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

6 Collaborating With Community

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

Background

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

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

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



How Were the Standards Developed?

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

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

How Can My PTA Use These Standards?

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

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

Creating an Action Plan

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

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

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

Making Progress

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



TRANSFORMATIVE FAMILY ENGAGEMENT

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

The solution? Transformative Family Engagement.

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





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

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

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



4 Principles of Transformative Family Engagement

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

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

Q What is the purpose of a PTA commission?

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

Q What is the role of a commissioner?

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

Q Who selects a commissioner?

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

Q Who selects commission members?

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

Q When does a commission meet?

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



INFORMATION ON COMMISSIONS

How to Get Started

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

Responsibilities of a Local PTA Commissioner

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



Responsibilities of a Council PTA Commissioner

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

Responsibilities of a Region PTA Commissioner

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

Who can Serve on a Commission Committee?

Local

- ♦ Teachers
- ♦ School nurse
- ♦ Appointees as needed
- ♦ Specialists
- ♦ Local officers
- ♦ Students (PTSA)
- ♦ Community members

Council

- ♦ Elected or appointed commissioner
- ♦ Local commissioners
- ♦ Council officers
- ♦ Appointees as needed
- ♦ Specialists
- ♦ Local presidents
- ♦ Student members
- ♦ Community members

Region

- ♦ Elected or appointed commissioner
- ♦ Council commissioners
- ♦ Region officers
- ♦ Appointees as needed
- ♦ Specialists
- ♦ Council presidents
- ♦ Student members
- ♦ Community members

State

- ♦ Elected commissioner
- ♦ Region directors
- ♦ Associate region directors
- ♦ State officers (as appointed)
- ♦ Specialists
- ♦ Council presidents
- ♦ Student members
- ♦ Community members



ORGANIZING YOUR COMMISSION/ COMMITTEE/PROGRAM/EVENT

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

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

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

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

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

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

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

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

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

How:

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

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

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

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



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

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

Step 4: Program or Event is held.

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

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

Want more resources? Go to utahpta.org/leadership-resources to find planning guides, organizing your board and more.

- ♦ *Resources include:* Commission/Committee Planning Sheet, Plan of Action Worksheet, Event/Program Planning Sheet, agendas, needs assessment, Organizing Your Board, etc.

Why:

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

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

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

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



REGION AND ASSOCIATE DIRECTOR

Checklist

- Ask for assistance when needed — don't guess.
- Meet with the outgoing region director to receive helpful information and transfer PTA materials.
- Attend Utah PTA conferences and conventions. Encourage your board to attend.
- Study the Utah PTA publications: *Region Director Handbook*, *Board of Directors Handbook* (aka Standing Rules) and the *Utah PTA President Handbook*. Also read through the Utah PTA Bylaws and parliamentary procedure (*Robert's Rules of Order*).
- Fill region board positions (which are not filled by elections) with appointees.
- Complete and submit a list of local presidents to Utah PTA.
- Assemble region calendar for at least one year.
- Attend Utah PTA's board retreat, held for three days in July, and all BOD (Board of Directors) Meetings.
- Prepare a proposed region budget and submit it to the Utah PTA treasurer for Finance Committee and Utah PTA board approval.
- Submit the name of a region alternate in writing to the Regions VP by August 15. Regions with an associate director may submit two names. Names of alternates must have previously been approved by the region board.
- Complete online reports for region. Include volunteer hours.
- Maintain a file of council and local bylaws and verify they are current.
- Meet with the Utah PTA president to submit goals.
- Prepare an agenda for each region meeting you conduct.
- Meet on a regular basis with your superintendent(s) and attend school board meetings.
- Hold a region *Reflections* Award Night.
- Hold a region Leadership Awards Night or another event to recognize volunteers.
- Participate in multi-region *Battle of the Bands*.
- Hold a Pre-Convention Orientation Meeting for local board members before early bird registration deadline (may be delegated to councils, if applicable.)
- Hold a Post-Convention Training Meeting for local board members (may be delegated to councils, if applicable.)
- Facilitate training for all councils and local PTAs as needed.
- Conduct a region membership campaign.
- Compile a procedure book. Encourage all board members to do the same.
- Oversee financial practices and reporting at the local PTA level, including collecting and compiling required forms and reports. This also includes annual financial reconciliation (with council help, if applicable).
- If you have a region checking account, submit a year-end financial statement and annual financial reconciliation to the Utah PTA treasurer by September 1.



Fiduciary Responsibility

Elected officers and members of the Utah PTA Board of Directors accept legal and fiduciary responsibilities on behalf of the region they serve. This responsibility requires knowledge, commitment, and time.

Fiduciary responsibility includes:

- ♦ **Duty of Care**—attending board meetings, staying informed and fulfilling responsibilities
- ♦ **Duty of Obedience**—following the organization’s bylaws and complying with state and federal law
- ♦ **Duty of Loyalty**—putting the interests of the organization first and promoting the organization’s purpose rather than any personal interest

Additional information about these responsibilities can be found in the President’s Tools and Finance sections of the annual Utah PTA *President Handbook*.

Remember:

- ♦ Read and sign the Utah PTA Board Ethics and Code of Conduct.
- ♦ Learn and use National Standards for Family-School Partnerships (see pages 9-11) as a tool in planning and evaluation of training and activities.
- ♦ Be positive.
- ♦ Delegate.
- ♦ Protect all privileged or confidential information.
- ♦ Use discretion and tact.
- ♦ Show sincere appreciation to everyone who contributes to the success of your PTA.
- ♦ Avoid conflict if possible. Communicate with fairness and understanding, using these guidelines:
 - Know and understand bylaws.
 - Be sensitive and responsible when involved in controversial issues.
 - Remain neutral so as to not alienate members of your region.
 - Represent PTA positions even if you may personally disagree.
 - Realize that because of your position, you will be identified with PTA, even if your intent was only to act as a concerned parent.
 - Recognize the need to avoid some situations (strikes, controversy over a principal or a teacher, etc.)
- ♦ Develop a good working relationship with the administrators in your district(s).
- ♦ Prioritize and delegate. As PTA becomes a part of your life, you will learn from your experiences and enjoy this opportunity of serving children. You will also see great personal growth.



BYLAWS AND STANDING RULES

Bylaws

Regions are governed by Article VIII of the Utah PTA Bylaws. This governance includes:

- ♦ Region purpose
- ♦ Region officers
- ♦ Region director, associate director, and Executive Committee duties
- ♦ Nomination and election procedures
- ♦ Procedure for filling vacancies

It is the responsibility of region directors and associates to read and become well versed in this section of the Utah PTA Bylaws as well as local and, if applicable, council bylaws.

Standing Rules

Each region is strongly encouraged to have standing rules. Standing rules add greater detail to the procedures and events of the region, but they must not conflict with the bylaws. Suggested topics include:

- ♦ Composition of the Executive Committee
- ♦ Position qualifications
- ♦ Job descriptions
- ♦ How vacancies will be filled
- ♦ When and where meetings will be held
- ♦ National and Utah PTA convention attendance (funding, hotels, meals, etc.)
- ♦ Region events (awards night, *Reflections*, *Battle of the Bands*, etc.)
- ♦ Interaction with school districts (superintendent meetings, liaison, voting procedures, etc.)
- ♦ PTA funding procedures (see pages 30-31)



MEETINGS, CONFERENCES, CONVENTIONS AND EVENTS

Utah PTA

Attend:

- ♦ Utah PTA Board of Directors meetings (bi-monthly)
- ♦ Utah PTA Commission/Committee Meeting (as assigned)
- ♦ Advocacy Conference
- ♦ Utah PTA *Reflections* awards event
- ♦ PTA Day at the Capitol
- ♦ Utah PTA Leadership Convention
- ♦ Additional conferences (as invited or requested)
- ♦ School board meetings
- ♦ Meetings with district superintendents
- ♦ Utah PTA *Battle of the Bands*

Region Meetings

Chair:

- ♦ Region board meetings
- ♦ Pre-convention orientation, coordinate with council(s)
- ♦ Region *Meet the Candidates Night* in an election year
- ♦ Post-convention meetings, coordinate with council(s)
- ♦ Region *Reflections* awards night
- ♦ Region awards night/ceremony
- ♦ Multi-region *Battle of the Bands*
- ♦ Other training meetings as needed

Region Board Meetings

When: Monthly or bi-monthly (after state board meeting)

Who: Region officers, including superintendent, council presidents, and others as needed

What: Conduct business (budget, nominating committee, etc.)

- ♦ Disseminate information from Utah PTA
- ♦ Provide leadership training
- ♦ Present reports (membership, legislative, etc.)
- ♦ Exchange and share ideas
- ♦ Instruct on policies/procedures
- ♦ Present awards as needed



Meeting with Your Superintendent

- When:** Meet with superintendent on a regular basis
- Who:** Region director and associate (if applicable)
- What:** Exchange information and concerns and coordinate PTA activities

Pre-Convention Orientation

- When:** Between local elections and early bird registration for the Utah PTA Leadership Convention
- Who:** All council and local board members and/or all PTA members

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

Suggested Agenda:

Welcome

Reverence/Thought and Pledge

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

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

Convention information you may want to cover:

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

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

Adjourn



Post-Convention Training

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

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

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

Post-Convention Training Suggested Agenda

Welcome

Reverence/Thought and Pledge

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

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

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

Convention information you may want to cover:

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

Additional training with a large group as needed.

Adjourn

Council Meetings, if applicable

Visit each council at least once a year



School Board Meetings

Check with the school district office for the dates of school board meetings. Ask to be added to their mailing list to receive the agenda for school board meetings.

Note: The region director is the official PTA representative in your school district. If a council wants to address the school board, the region director should work with the council president to determine how the presentation will be made.

If a PTA concern needs to be addressed at a school board meeting:

- ♦ Council concerns (when applicable) are presented by the council president. The region director should always be informed of any presentation to be given at a school board meeting.
- ♦ Region concerns are presented by the region director.

Utah PTA Leadership Convention

Region directors and associates are required to attend Utah PTA Leadership Convention, typically held in May. Members of the Board of Directors attend each day and are asked to:

- ♦ Help set up and take down the event
- ♦ Fulfill previously determined assignments
- ♦ Help with facilitation and registration
- ♦ Be welcoming and friendly
- ♦ Help in other areas as needed

PTA Day at the Capitol

Utah PTA arranges one day during each legislative session to be PTA Day at the Capitol. It is a time for PTA members to come together from across the state to learn about current issues of concern before the legislature, to see and participate in the legislative process in action, and to meet with legislators.

A lunch or reception for all legislators may be held. This proves to be an invaluable tool in influencing support for children's issues. Most legislators look forward to PTA Day and especially enjoy the lunch or reception with their PTA constituents. Region directors and legislative contacts are usually asked to help with PTA Day.



ORGANIZE YOUR BOARD

Elected

Region director and associate director are elected.

Other elected officers: secretary and treasurer (if applicable).

Note: Nominations for these officers are presented by a Nominating Committee, and are elected by the region voting body. (Bylaws Article VIII, Sec. 7 and 10)

Appointed

All other region board positions are elected by the region voting body or appointed by the region director.

- ♦ Each board member should have a job description and receive training
- ♦ Orient your board to PTA policies, bylaws, procedures, PTA structure, etc.

CALENDARING

- ♦ Plan a tentative calendar for the entire year
- ♦ Coordinate dates of Utah PTA, region, council, and local PTA meetings and activities so they don't conflict and then facilitate dissemination of information
 - The tentative Utah PTA Long-Range Calendar will be in your May Leadership Convention Packet and the final Long-Range Calendar will be in the Utah PTA *Board of Directors Handbook* which is distributed at the July Retreat.
- ♦ Meet with your administrator(s) as soon as possible to clear dates and coordinate activities for the district calendar(s)
- ♦ Schedule regular meetings for the year with the district superintendent(s)
- ♦ Distribute the long-range calendar as soon as it is finalized, preferably by the post-convention training

NEEDS ASSESSMENT

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

The Utah PTA *President Handbook* contains additional information on how to conduct an assessment.



INSTALLATION OF OFFICERS

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

After inviting officers to stand, read the purposes and mission of PTA and then use wording similar to either example 1 or 2 to install officers after inviting them to stand.

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

1

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

You may be seated.

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

2

(Please answer “I will”.)

You may be seated.



BOARD UNITY

Leader's Responsibility in Managing Conflict

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

Basic Guidelines About Conflict Resolution

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

Avoiding Conflict Within the Local PTA

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

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



SIX STEPS TO PROBLEM SOLVING

1 Identify the Problem

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

4 Set Priorities and Design an Action Plan

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

2 Brainstorm the Solutions (Generate multiple solutions)

- ♦ Select alternatives
- ♦ Set priorities

5 Carry Out Action Plan

3 Select the Most Promising Alternatives

6 Evaluation

Problem Solving Pointers

You cannot determine a solution before you know the problem.

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



FINANCES

Region PTAs are required to abide by the same financial policies and procedures as local and council PTAs. Specific information can be found in the following resources:

- ♦ *Council & Region Financial Reporting Handbook*
- ♦ *Utah PTA Treasurer Handbook*
- ♦ Finance section of the annual Utah PTA *President Handbook*
- ♦ Treasurer page of the Utah PTA website - utahpta.org/treasurer
- ♦ Local PTA Leader's Guide - Finance section found at prakit.org

**PTA is a child advocacy organization – not a fund-raising organization.
PTAs do not exist to raise funds but raise funds to exist.**

Utah PTA's exempt organization status with the IRS—which covers all units (local, council and region) in good standing—is extremely valuable to the organization and nothing must be done to jeopardize the exemption.

- ♦ Each PTA must operate exclusively for exempt purposes, as defined by the bylaws
- ♦ The PTA's resources and funds cannot be used for the private benefit of an officer or director (private inurement)
- ♦ Each PTA must absolutely refrain from participating in the political campaigns of candidates for local, state, or federal office
- ♦ The PTA must restrict its lobbying activities to an insubstantial part of its total activities

Utah PTA does not financially sponsor individuals, groups, and other organizations, nor does it hire employees on a region, council, or local level.

Expenses Within the Region

- ♦ All region directors are required to submit to the Utah PTA treasurer a proposed budget for the fiscal year, outlining estimated income and expenditures for activities within their region. This budget proposal will be reviewed, approved, and included by the Finance Committee in the overall annual budget, to be approved by the board at its September meeting. The proposed budget must be approved before expenditures can be made.
- ♦ Each region is allocated a total of \$800 annually to conduct the business of the region and \$20.00 for each additional 100 PTA/PTSA members in the region.
- ♦ Approved expenses for region budgets are as follows:
 - 1) Travel within the region (reimbursed at the rate of 35 cents per mile)
 - 2) Postage
 - 3) Printing and publications
 - 4) Office supplies
 - 5) Meeting related expenses



- 6) *Reflections*
- 7) *Battle of the Bands*
- 8) Other program expenses

- ♦ A \$50 advance of funds is available, when requested, after approval of the proposed budget.
- ♦ Payments and reimbursements for region expenditures will be made in a timely manner upon submission to the Utah PTA treasurer of a completed “Request for Payment” form with receipts attached. Reimbursement requests must be submitted within 90 days of the expenditure.
- ♦ When a region maintains its own bank account, the region director is required to submit to the Utah PTA treasurer a year-end financial statement and an annual financial reconciliation report by September 1.

Expenses Outside the Region

- ♦ **Region Director’s and Associate Director’s Expenses:** Expenses for Utah PTA meetings, conferences, and conventions are not paid from the region budget, but reimbursement for these expenses is handled in the same way. Reimbursement requests must be submitted within 90 days of the expenditure.
- ♦ **Utah PTA Conferences and Conventions:** Registration fees are waived for region directors and associate directors for conferences or conventions that they are required to attend. Applicable registration forms or other requested information must be submitted as requested by the Utah PTA treasurer or office staff.
- ♦ **Lodging:** Generally, region directors and associate directors may be provided with double-occupancy lodging upon notification to the office during multi-day Utah PTA board meetings or events when travel distance exceeds 50 miles one-way. When meetings, events, or other board responsibilities are scheduled to conclude after 9:00 p.m., lodging may be provided as circumstances require. Requests for exceptions to the general policy, including issues of health, safety, and weather, should be submitted to the president and/or treasurer for consideration of extenuating circumstances.
- ♦ **Meals:** Region directors and associate directors may receive funds for meals while attending Utah PTA board meetings, conferences, or conventions. A meal per diem may be approved according to the GSA (General Services Administration) rate for the area in which a board member is present for whichever meals are not provided. Upon approval by the president, a meal per diem may be issued in advance. When expenses are unavoidably higher because of out-of-state travel or field services, actual expenses may be reimbursed upon submission of receipts to the treasurer.
- ♦ **Travel:** Costs of driving to Utah PTA events may be reimbursed at the rate of 35 cents per mile after approval by the president and the treasurer for the following:
 - 1) Board meetings including July Retreat
 - 2) Utah PTA conventions and conferences including PTA Day at the Capitol
 - 3) Commission and committee meetings and official assignments as a Utah PTA representative
 - 4) Special meetings as called by the president

Region directors and associate directors are encouraged to carpool whenever feasible.

Note: Any board member who cannot attend a scheduled meeting, conference, or convention and has not asked to be excused more than 48 hours prior to such meeting, conference, or convention, or prior to the incurrence of non-refundable expenses, if applicable, shall be responsible to reimburse Utah PTA for expenses incurred. Extenuating circumstances will be referred to the president and treasurer on a case by case basis.



DONOR-ADVISED FUNDS

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

Procedure

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

Donor-Advised Funds

1. Benevity Causes: causes.benevity.org/

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

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

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

2. Fidelity Charitable Gift Funds: fidelitycharitable.org

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

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



3. **YourCause** : yourcause.com

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

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

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

4. **Other Corporate/DAF/Employee Funds:**

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

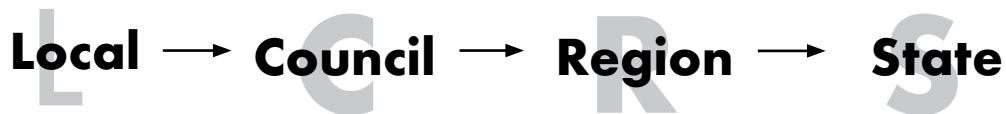


RECOGNITION AND AWARDS

PTA awards are a great way to recognize excellent volunteers and the service they give on all levels of PTA. All Utah PTA award applications are located in the Utah PTA *President Handbook* or on the PTA awards page under the Programs tab on utahpta.org. If you have any questions, please contact the Utah PTA office or the Utah PTA Awards Board Specialist.

All awards must go through both council and region before going to the state level. Please check the Utah PTA *President Handbook* for further information and deadlines. Have an awards evening in your region if possible.

PTA Award Advancement:



Possible events to give recognition and awards:

- ♦ Founders' Day - February 17th
- ♦ Volunteer Appreciation, typically the first full week of May
- ♦ Past president
 - It is always appropriate to honor an outgoing or past president with a past president pin (available for both council and local past presidents). They may be purchased at the Utah PTA office or on-line from shoppta.com
- ♦ Utah PTA Honorary Life Membership
 - Appropriate for any dedicated PTA volunteer or administrator
- ♦ Other Recognitions (awards, gifts, certificates, announcements, etc., as applicable)

MULTI-REGION BATTLE OF THE BANDS

The *Battle of the Bands* competition is held at the local, multi-region, and state levels.

One band from each high school is eligible to compete at the multi-region level. Three winners from the multi-region competition advance to the state competition.

The following is the multi-region configuration:

- ♦ North multi-region: Region 1, 2, 3, 4 and 21
- ♦ North central multi-region: Region 5, 6, 7, 8 and 19
- ♦ South central multi-region: Region 9, 10, 11, 12, 13, 17
- ♦ South multi-region: Region 15, 16, 18, 20

Region directors in each multi-region should meet together to determine which region will host the event and how funds from the event will be expended and profits distributed. Regions that are not hosting should take assignments to assist as needed.



REFLECTIONS

- ♦ Appoint a region *Reflections* Chair.
- ♦ Determine region *Reflections* due dates.
- ♦ Coordinate collection of *Reflections* entries from council PTAs, judging of entries at the region level, and advancement of winners to state.
- ♦ Plan and hold a region *Reflections* awards event.
- ♦ Regions set their *Reflections* due date based on the state due date.
- ♦ Refer to the *Reflections* Local Leaders Guide for information, rules and forms. The Local Leaders Guide, rules, and forms are available on the Utah PTA website for *Reflections*: utahpta.org/reflections.
- ♦ *Reflections* entries will NOT be judged on the state level if the bylaws and membership dues of local PTAs are not current. Please work with your council and local leaders to ensure that their PTAs are in good standing (bylaws up to date and membership current).



REPORTS

Collect From Councils (or from locals, where councils are not organized)

- ♦ Council and/or local year-end financial statements
- ♦ Council and/or local “Annual Financial Reconciliation”
- ♦ Council and/or local “Summaries of Year-End Financial Reports”
- ♦ Council and/or local approved budgets and meeting minutes where approved
- ♦ “Council and/or Local Ethics/Conflict of Interest Policy” forms
- ♦ Council and/or local “Basic Fiscal Management Procedures”
- ♦ Council and/or local money handling forms
- ♦ Council and/or local “Sales Tax Compilations” with all local “Sales Tax Refund Request” forms
- ♦ Other reports as requested
- ♦ Track submission of local and council “Report Forms #1, #2 and #3”

Complete and Submit to Utah PTA

- ♦ “Region Year-End Financial Statement”
- ♦ “Region Annual Financial Reconciliation”
- ♦ “Region Summary of Year-End Financial Reports”
- ♦ “Council/Region Beginning Year Reports”
- ♦ Copy of local, council, and region 990s
- ♦ “Region Sales Tax Compilation” with council compilations and all local “Sales Tax Refund Request” forms
- ♦ “Region Report Forms #1, #2, and #3”



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

Specific Information:

- The Employer Identification Number (EIN) and local unit number are found on the first page of your bylaws. You may find a copy of your bylaws on the Utah PTA website or you may contact your council president or region director.
- The number of members is year-to-date.
- Volunteer hours are for the Report period only, **not** year-to-date.
- Know the answers to questions on the report form (i.e., bylaws, dues, finances). The questions asked on the reports are listed on the website.
- Your region director will receive a copy of your report after it has been submitted.



ORGANIZING A NEW LOCAL PTA

Region Guidelines

Request the New PTA Packet from the Utah PTA office. Information and forms for both Organizing a New Local PTA and the Dissolution of a Current PTA may also be requested from the Utah PTA office.

OVERVIEW FOR REGION DIRECTORS FOR STARTING A NEW PTA

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

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

Note: Checks for dues should be made out to the Utah PTA. At the close of the planning meeting, the region and/or council overseeing the process writes a check to Utah PTA which is sent in with the “New PTA Membership Remittance” form. Utah PTA will pay national, state, and council dues (if applicable), and send the remaining funds to the local PTA to open a new PTA bank account.



- ♦ The day after the Organizing Meeting, the following paperwork must be sent to the Utah PTA office:
 - Application for Membership in Utah PTA form
 - New PTA Membership Dues Remittance Form
 - SS-4 and Group Exemption Authorization Statement
 - Application for Employer Identification Number
 - Submitting New Bylaws form
- ♦ After these are received in the office, the officers will receive:
 - Written notification of their EIN.
 - Notice of approval of their bylaws.

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



OVERVIEW FOR REGION DIRECTORS FOR THE DISSOLUTION OF A PTA

Region/Associate Director/Regions VP:

1. Request the Dissolution of a PTA packet from the Utah PTA office.
2. Work with the local PTA to make sure the Local Unit Dissolution Checklist is followed.
3. The letter of intent must be sent to the Utah PTA president. The letter will be shared with the region director when received.
4. Attend the Dissolution General Meeting with other Utah PTA officers and if needed, speak at the meeting.
5. Cashier's check will be sent to the office upon account being closed. The regions will be notified when the check is received in the PTA office.
6. All of the following must be received from the region director:
 - A. Remaining assets and property of the PTA
 - B. All Utah and national materials received by this PTA
 - C. Dissolution meeting minutes
 - D. Disbursement plan
 - E. Meeting minutes from the current year
 - F. Receipts, budget, and audit report for the current year
 - G. Membership rosters for the current year
 - H. All financial statements
 - I. All checkbook registers or ledgers
 - J. All bank statements
 - K. IRS "Form 990" for the current year
7. The regions will make sure:
 - A. The PTA emails and correspondences for this PTA will cease
 - B. The use of the EIN and the local PTA name has ceased
 - C. The promoting and use of the PTA programs has ceased (*Reflections, Battle of the Bands*)
8. Work with the new organization in receiving disbursement of funds with proper documentation and receipts for reimbursement



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.*

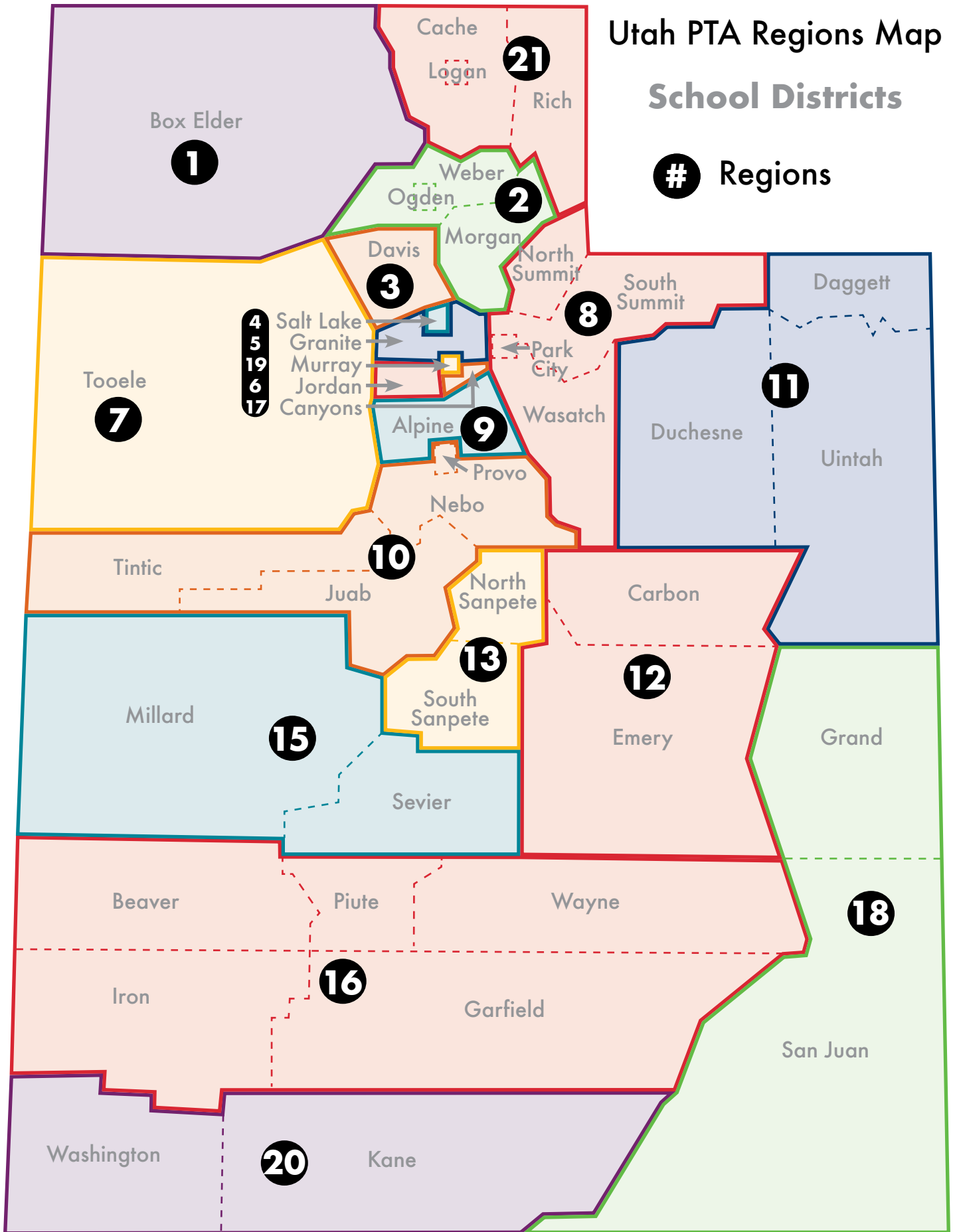




Utah PTA Regions Map

School Districts

Regions





CONNECT

UTAH PTA

5192 S. Greenpine Drive
Salt Lake City, UT 84123

Phone: (801) 261-3100

Fax: (801) 261-3110

Kids@UtahPTA.org

UtahPTA.org

Monday - Thursday

9:00 am - 3:00 pm

Closed Friday | Closed holidays

Please call before you come to ensure office is open.

NATIONAL PTA

1250 N. Pitt Street

Alexandria, VA 22314

Phone: (703) 518-1200

Toll Free: (800) 307-4PTA (4782)

Fax: (703) 836-0942

Info@PTA.org

PTA.org

**Utah
PTA[®]**

everychild.onevoice.

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Utah PTA

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Utah PTA Super Secondary

Utah PTA Excellent Elementary

Utah PTA Treasurers

Utah PTA Reflections

Utah School Community Councils

Real Men of Utah PTA



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