

# TABLE OF CONTENTS

## President Handbook: Tools

WELCOME, PRESIDENT .....	19
PRESIDENT'S RESPONSIBILITIES .....	20
RESPONSIBILITIES OF PTA LEADERS .....	21
WHY PRESIDENTS SUCCEED .....	21
TRANSITION PERIOD .....	22
LOCAL PTA/PTSA PRESIDENT'S CHECKLIST .....	23
STANDARDS OF AFFILIATION FOR GOOD STANDING .....	25
ORGANIZE YOUR BOARD .....	28
THE PRINCIPAL AND THE TEACHER VICE PRESIDENT .....	30
ORGANIZING YOUR COMMISSION/COMMITTEE/PROGRAM/EVENT .....	31
NEEDS ASSESSMENT INFORMATION .....	33
SAMPLE NEEDS ASSESSMENT .....	34
CALENDAR .....	35
YEAR-LONG CALENDAR AND TIME LINE .....	36
New Officer Transition Timeline (March through June) .....	36
Beginning of Fiscal Year - A Timeline for Presidents .....	38
July .....	38
August .....	38
September .....	39
October .....	39
November .....	40
December .....	41
January .....	41
February .....	42
March .....	43
April .....	43
May .....	44
June .....	44
July .....	45
August .....	45
MEETINGS .....	46
PTA MEETINGS DEFINED .....	46
RUNNING MEETINGS .....	48
MATERIALS .....	48
AGENDAS .....	48

MINUTES .....	49
INFORMATION FOR BOARD AND EXECUTIVE COMMITTEE MEMBERS .....	50
WHAT ARE STANDING RULES? .....	50
PARLIAMENTARY PROCEDURE .....	51
VIRTUAL MEETINGS AND VOTING .....	54
WAYS TO RECRUIT AND RETAIN VOLUNTEERS .....	55
WHY COUNT VOLUNTEER HOURS? .....	56
PROCEDURE BOOK .....	57
PROBLEM SOLVING POINTERS .....	58
CONFLICT MANAGEMENT .....	58
DEALING WITH DIFFICULT PEOPLE .....	59
CHAIRING A TOUGH MEETING .....	60
SCHOOL COMMUNITY COUNCILS .....	61
PTA AND SCHOOL COMMUNITY COUNCILS WORKING TOGETHER .....	64
Trust Lands And School Community Councils .....	64
INSTALLATION OF PTA OFFICERS .....	65
LEADERSHIP POINTS TO PONDER .....	66
LOCAL PTA REPORTS #1, #2, AND #3 .....	67
How to file: Submitted by Local and Council Presidents and Region Directors .....	67
PTA MISSION BOOKMARK .....	70

# 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](http://utahpta.org). Information on renewing your bylaws can be found at [utahpta.org/bylaws](http://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](http://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 Givebacks 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, to increase the leadership pipeline.

### 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](http://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](http://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](http://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](http://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](http://utahpta.org/Reports).



# RESPONSIBILITIES OF PTA LEADERS

- ♦ Accept your position and contribute 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](http://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](http://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. The council bylaws state that the president, president elect and principal are voting members of the council and should attend the council meetings. 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 council and region trainings and meetings. 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 October 1.
- Become aware of the annual Utah PTA legislative priorities and attend all advocacy conferences.
- Meet on a regular basis with your principal, who is the administrative vice president of the 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 FOR GOOD STANDING

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	<b>1</b>	Bylaws followed	Current	Adheres to the purposes, bylaws, basic principles and procedures of the PTA	
Utah PTA, IRS	<b>2</b>	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	<b>3</b>	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	<b>4</b>	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	<b>5</b>	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than August 1	
Utah PTA	<b>6</b>	Budget approved	Current	Budget was approved by the membership by October 1 with meeting minutes	
Utah PTA	<b>7</b>	Office Names/ Contact Info	Current	List of incoming officers with addresses, phone numbers, and email addresses on file with Utah PTA	
State of Utah	<b>8</b>	Proof of Insurance	Current	Purchased appropriate insurance by October 1	
Utah PTA	<b>9</b>	Forms Signed	Current	Signed Conflict of Interest form and Basic Fiscal Management Form	
Dept of Consumer Protection, Utah PTA	<b>10</b>	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	<b>11</b>	Financial Procedures	Current	Principal must sign each check request form	
Utah PTA	<b>12</b>	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	<b>13</b>	Minutes	Current	Minutes must be taken an approved at every PTA board meeting, general membership meetings, and PTA committee meetings	
Utah PTA	<b>14</b>	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	<b>15</b>	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	<b>16</b>	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
- ♦ Social Media, email 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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### COMMISSIONERS

*Article X, Section 2-3 | Appointed or Elected*

Community Engagement	Education	Family Life	Health	Individual Development	Safety	Student Life
Room parents Staff Appreciation Student Stores Holiday Stores Holiday Celebrations Carnival Celebrations Fundraiser	Read-a-thon Spelling Bee Stem Nights Book Fair Parent Events	Take your Family to School week Fun Family Night Parent Education Night Family Dinner Night Outs	Red Ribbon Week Fitness Week Track Team Field Day Maturation	Reflections Battle of the Bands Talent show Charater Education Program Yearbook	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 1a-g | PTA in good standing*

AFR
Nominating Committee
Election Committee

### SPECIAL COMMITTEES

*Article X, Section 5 | Special Committees are generally 1 time committees that help meet a specific purpose, i.e:*

Sponsors	Fundraiser
Spirit Days	Box Tops
Membership	School Celebration

This page is designed to help you use Bylaws to build your board. Your board may look different. See [utahpta.org/basic-structure](http://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](http://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	2	3	4
Method	Interview	Questionnaire	Online Survey	Speaking Out
Type	Person-to-person Person-to-group Telephone	Fill out at a school activity Send home with child Door-to-door	Email out a survey in Google Forms or Survey Monkey	Best used in small groups — divide larger groups into smaller groups
Advantages	Immediate response	Easy to administer and tabulate	Easiest to administer and tabulate	Immediate response More personable —people have a “buy-in”
Disadvantages	Difficult to administer and tabulate. Takes a lot of time	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 activity.	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.	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](http://utahpta.org)

Council calendars

Region calendar

School district calendar

School calendar

Community calendar

National PTA website: [PTA.org](http://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](http://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](http://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 Givebacks. Leaders listed in Givebacks will receive newsletters and communications from Utah PTA.
- ♦ Obtain a copy of your local bylaws from [utahpta.org/bylaws/search](http://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](http://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 Givebacks 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:

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

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

---

### In General:

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- ♦ 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 meeting 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 Givebacks, 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.

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### Dates to Remember:

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**August 1** - Year end information submitted through Givebacks by treasurer:

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

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

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- 
- ♦ Council submit to region via Givebacks approval
- 

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

---

### In General:

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- ♦ 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:

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

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- ♦ Region submit to Utah PTA via Givebacks 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).

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### In General:

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- ♦ 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)
  - 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:

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**October** - Utah PTA Advocacy Conference.

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**October 1** - Beginning-of-Year Documents submitted through Givebacks:

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- ♦ 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

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

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

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

- ♦ Council submit to region via Givebacks approval

---

**October** - Military Family essay due to Utah PTA.

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**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](http://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

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### Dates to Remember:

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

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

- ♦ Region submit to Utah PTA via Givebacks approval

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**TBA** Veteran’s Day Concert.

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

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**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).

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## In General:

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- ♦ 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

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## Dates to Remember:

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

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**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).

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## In General:

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- ♦ 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.

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## Dates to Remember:

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**January** - Local PTA award applications due to council.

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**January** - Reflections due from regions to Utah PTA- check [utahpta.org](http://utahpta.org) for due dates.

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**January 21** - First day of legislative session.

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

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

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## In General:

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- ♦ 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

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## Dates to Remember:

---

Utah PTA **Leadership Convention registration** begins

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**February 1** - Local, council, and region Report #2 due - submit on [utahpta.org](http://utahpta.org).

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**February 1** - PTA Awards due from council to region.

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

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**PTSA Student Days at the Capitol** - check [utahpta.org](http://utahpta.org) for dates.

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**PTA Day at the Capitol** - check [utahpta.org](http://utahpta.org) for date.

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**February 17** - PTA Founders Day.

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

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LEAP Award application- check [utahpta.org](http://utahpta.org) for due date

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Student Scholarship applications- check [utahpta.org](http://utahpta.org) for due date

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## In General:

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- ♦ 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 14 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:

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PTA Awards due from Region to Utah PTA- check [utahpta.org](http://utahpta.org) for due date

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Membership Awards due to Utah PTA- check [utahpta.org](http://utahpta.org) for due date

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Local Units Battle of Bands Winners due to Multi-Region Chair-check [utahpta.org](http://utahpta.org) for due date.

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Gold Star Award application due to Utah PTA-check [utahpta.org](http://utahpta.org) for due date

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**March 7** - Legislative session ends.

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

---

## In General:

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- ♦ 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

## Dates to Remember:

---

**Utah PTA Reflections Awards Evening** (TBA).

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Battle of the Bands Multi-region winners due to Utah PTA- check [utahpta.org](http://utahpta.org) for dates

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**Utah PTA Battle of the Bands** - check [utahpta.org](http://utahpta.org) for dates.

---

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

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## In General:

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- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>♦ Pre-convention orientation meetings held</li><li>♦ Other activities (Google for more information).<ul style="list-style-type: none"><li>▪ Every Kid Healthy Week</li><li>▪ National Child Abuse Prevention Month</li><li>▪ Distracted Driving Awareness Month</li><li>▪ National Volunteer Month</li><li>▪ Month of the Military Child</li><li>▪ National Arab-American Heritage Month</li></ul></li></ul> | <ul style="list-style-type: none"><li>♦ Register incoming board for Utah PTA Leadership Convention.</li><li>♦ Enter incoming board information in Givebacks. Leaders listed in Givebacks will receive newsletters and communications from Utah PTA.</li><li>♦ Show incoming president how to download copy of bylaws from <a href="http://utahpta.org">utahpta.org</a>.</li></ul> |
|--|---|
-

# MAY

## Dates to Remember:

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**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.

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**Annual Utah PTA Leadership Convention** - Check [utahpta.org](http://utahpta.org) for exact dates.

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

---

## In General:

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- ♦ 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.

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**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:

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- ♦ 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](http://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:

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

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

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#### In General:

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- ♦ 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 Givebacks.

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# MEETINGS

<b>You Chair</b>	Executive Committee Meetings Board Meetings General Membership Meetings
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<b>You Attend</b>	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](http://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](http://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 PTA
2. Kind of meeting (executive, finance, special committee, general, etc.)
3. Date, time, place of meeting
4. Name of person conducting and those taking part
5. Attendance - The minutes should note who was present and if a quorum was present. Also note those board members who were excused and any non-PTA members who are present.
6. Call to Order (time)
7. Note who gave the Reverence/Thought and the Pledge of Allegiance.
8. The agenda was presented and adopted.
9. The minutes were presented and approved and list any corrections.
10. The treasurer's report: given by \_\_\_\_\_.
11. An outline of the treasurer's report and any action taken should be reported here.
12. Treasurer Reports are not voted on. After questions are taken they are filed for the AFR (Annual Financial Review)
13. Reports from the members of the board including committee chairman
14. List each position or committee, board member's name, what was reported, and any decisions, actions, or motions that were taken.
15. Additional reports: Other reports from the agenda that were presented at the meeting.
16. New business and action items: List any new business or action items that will take place for the next meeting. Record motions and results.
17. Calendar Events: Note any calendar events coming up before the next PTA board meeting and important information involving these events.
18. Adjournment: Note the time the meeting adjourned.
19. Approval of Minutes: At the next meeting the minutes will be read and approved.
20. The approval of minutes should include.
21. Minutes approved: (date)\_\_\_\_\_ (signature of secretary)\_\_\_\_\_.

\*\*\*The secretary should sign all minutes with name, title, and date and enter the minutes in the Secretary's Book.

## **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

## **How long do I keep minutes?**

- ♦ These are permanent historical records

## **Why do I keep the minutes?**

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

## **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 14 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](https://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](http://utahpta.org/bylaws). Your bylaws can be downloaded on [utahpta.org/bylaws/search](http://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](http://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](http://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](http://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](https://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](http://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.

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*



# 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](http://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](http://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

Are your bylaws current?

Has your PTA budget been approved according to your bylaws?

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

Did you pay for insurance?

Have all state and National portions of your membership monies been remitted to Utah PTA (and council dues if applicable)?

## Meetings and Minutes

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

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

Number of General PTA Meetings held from July 1 through October 31

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
- ♦ Did two officers attend training?

## 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 state and National portions of your membership monies been remitted to Utah PTA?

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 or Region Director be of service to you?

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

## List of Questions on Report #3

Please submit the name of incoming presidents name, phone and email

Please submit names of PTA officers into Givebacks.

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?

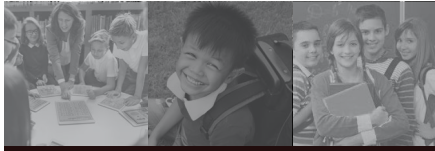
- ♦ President
- ♦ President-Elect
- ♦ Treasurer
- ♦ Secretary
- ♦ Membership
- ♦ Reflections
- ♦ Other

### Budget and Finances

Have all state and National portions of your membership monies been remitted to Utah PTA (and council dues 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"?



**Utah**  
**PTA**<sup>®</sup>

*everychild. one voice.*

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## **MISSION**

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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](http://utahpta.org)