



2025 UTAH PTA HANDBOOK
PRESIDENT

The infographic features a vertical stack of five white circles on a dark blue background. Each circle contains text representing a leadership role. Above the circles is the National PTA logo and tagline.

National PTA®
everychild.onevoice.®

- BOARD OF DIRECTORS
- NATIONAL PTA STAFF
- NATIONAL PTA COMMITTEES
- PAST PRESIDENTS
- STATE PTA PRESIDENTS

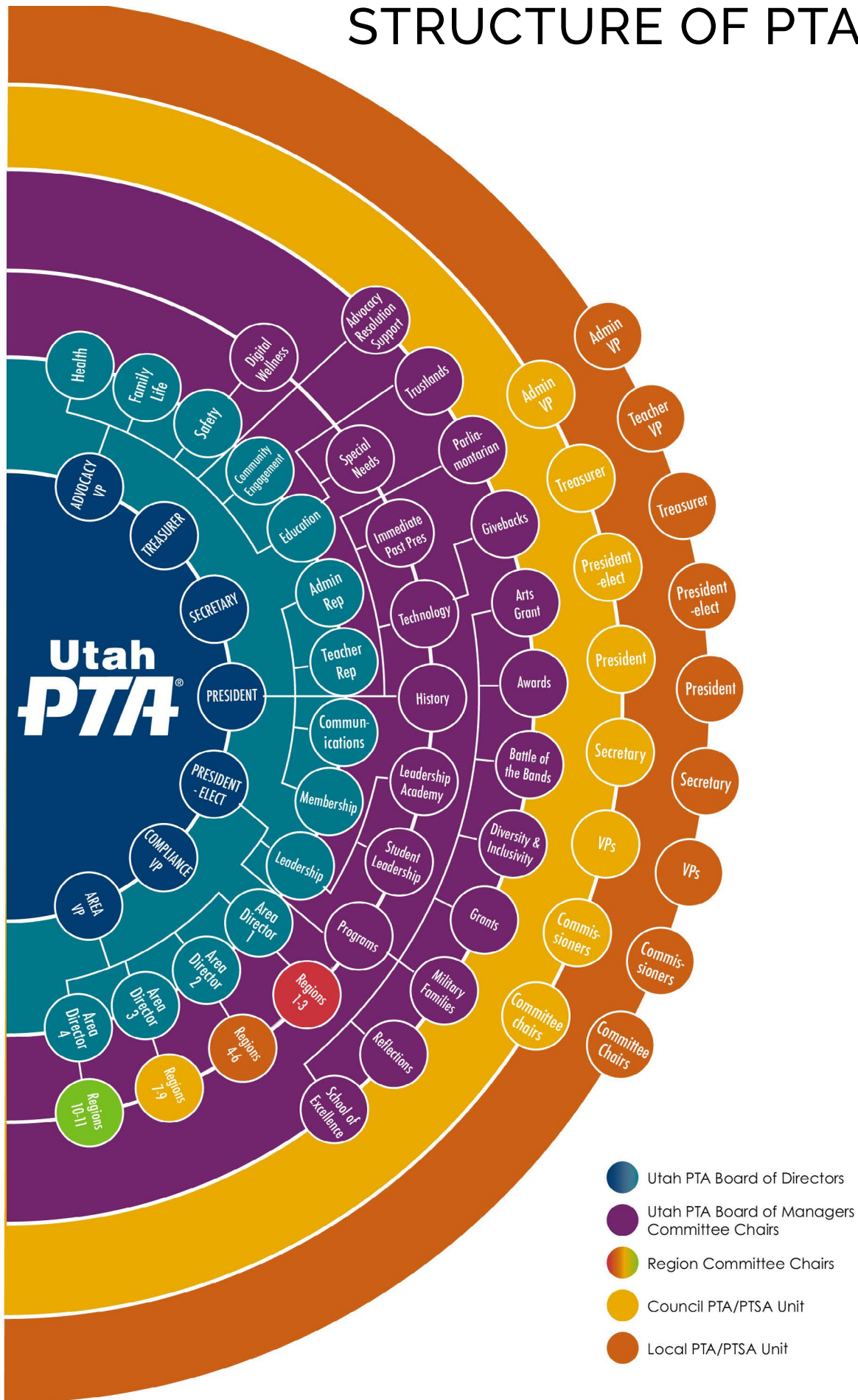


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UTAH PTA PRESIDENT'S MESSAGE

Welcome to the 2025-2026 PTA Year and what a year it will be! It's the year Utah PTA celebrates its 100th birthday! Utah PTA has a long history of child advocacy, parent engagement and leadership development. From the days before Utah statehood to now, Utah PTA and its predecessor "Utah Mother's Congress" has been at the forefront of advocating for the best education for all children. From leading the drive for kindergarten, to school lunches, to health screenings and laws to protect children, Utah PTA has been the driving force. From its very beginnings, in the front parlors of family homes to the state capitol, the same mission has been at play for more than 100 years, to Make Every Child's Potential a Reality.

PTA has been a huge part of my adult life. It has given me just as much as I have given it. Like you, I started PTA to give back to the school that gave so much for my children. My child benefited from family events, class parties, curriculum enrichment and they saw first hand the impact of serving your community through PTA service. Our family has enjoyed many family dances, talent shows, reflections ceremonies and even tailgate parties with warm blankets and pom-poms! I have gained friendships, knowledge and skills in a variety of areas and fields and I most importantly found my voice. PTA taught me how to stand up for myself and children in an effective manner. PTA taught me how to advocate for my own children in IEP meetings to now testify before legislators for your children, something I would have never have thought I could do. PTA also taught me to look at situations from different perspectives and see other ways to accomplish goals.

As we move through this momentous year, I hope you will take the time to learn the history of Utah PTA. It is through its history where we can find strength, perseverance and the foundation to build future successes on. PTA is a vital organization ADVOCATING for every child, at any age and from any socioeconomic situation to help them secure physical, mental, emotional, spiritual and social well being. PTA continues to DEVELOP programs, resources and leadership opportunities for not only children but the adults supporting the children in our communities while ENGAGING our communities to help us make every child's potential a reality. PTA is a TEAM! PTA is a network of families, students, teachers, administrators and the community all with a common goal! It's truly amazing!

Utah PTA strives to be a wonderful resource to all local and council leaders. Please take the time to read and study this handbook and your bylaws, search and study the Utah PTA website, attend any and all training opportunities, and join the many social media avenues offered by Utah PTA as well as your Council and National PTA. The network of leaders from around Utah and the Nation are truly a great group of people ready to share ideas, burdens and handouts. They are there and are ready to help! Reach out!

Your service combined with the many others of team PTA will make a significant impact on countless children and families. I hope that you will see the strengths of your board and utilize their skills to be the most successful you can be. Effective communication and fostering a welcoming environment are key components of a successful PTA and in turn, you as a leader. We are so fortunate to have a great foundation and legacy, to build a lasting future upon.

Thank you for your service to PTA this year. It is going to be a great year! I look forward to meeting many of you and serving alongside you as we continue to fulfill our mission, To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.



Julie Cluff

Utah PTA President 2025-2027

INTRODUCTION

The information in this handbook has been compiled by Utah PTA to help you carry out the responsibilities associated with your leadership role in your PTA/PTSA. This handbook is meant to be a guide to help you carry out your PTA service. Please share with the board members of your PTA as it will also help them in their journey.

New this year are QR codes and links to take you to more information and handouts on utahpta.org.



Don't see a topic you need help with? utahpta.org has it. Use the search feature to find just what you are looking for. Each position has its own page on our website that will help you in your position. The main landing page for officers is: utahpta.org/executive-committee The "RUN YOUR PTA" tab is a great one stop place to find the PTA answers you need. Check it out today and bookmark that page for easy access.

The National PTA website is a great tool with resources for all things PTA including: events, programs, training tools and grant opportunities. pta.org

Your Council President and their board are excellent resources for you as a local leader. Each local unit should send the president, president elect and principal to each council meeting to receive training, conduct the business of the council and to collaborate with the other local PTA units in your area. From time to time, councils will hold training opportunities for other leaders in your PTA to learn. Please take advantage of those opportunities.

Utah PTA offers several Social Media options to help leaders and PTA members alike connect, ask questions and help one another in their PTA service journey. Please see the back cover of this handbook for all of the Utah PTA social media offerings and join us on the platform you prefer.



everychild.one voice.

CORRECT USAGE OF THE PTA NAME

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

Do not use periods, hyphens, or small letters.

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

OVER 125 YEARS STRONG



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

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

National PTA Mission Statement

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

Utah PTA Mission Statement

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

Utah PTA Vision Statement

To fulfill the Mission, Utah PTA will:

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

Purposes of PTA

- ♦ To promote the welfare of children and youth in home, school, places of worship, and throughout the community.
- ♦ To raise the standards of home life.
- ♦ To advocate for laws that further the education,

physical and mental health, welfare, and safety of children and youth.

- ♦ To promote the collaboration and engagement of families and educators in the education of children and youth.
- ♦ To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- ♦ To advocate for fiscal responsibility regarding public tax dollars in public education funding.

PTA Values

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

WHY PTA?



With schools facing challenges like inadequate budgets and lack of educational equity, PTA is more important than ever. PTA provides programs on strengthening family-school partnerships and free resources on issues and areas such as arts, STEM, and health & safety. PTA/PTSA members are part of a powerful association that can advocate on behalf of children and educators at the local, state, and national levels. Families, students, teachers, and schools all benefit from being a part of the PTA.



Families

- **Get Connected & Trained:** There's no better way to know what's happening in your school and network with parents and teachers. Access high quality leadership training.
- **Discover Great Resources:** The PTA offers a variety of programs designed for parents as well as students.
- **Speak Up:** PTA can be a way for you to be more effectively engaged at your child's school to help make positive improvements.
- **Be a Role Model:** Demonstrating to your child the importance you place on education.



Teachers

- **Family Engagement:** Access resources and grants to support family engagement. Apply for funds and access resources and tools for parents.
- **Build Community:** PTA provides more opportunities to connect with families and students to build strong school communities.
- **Programs:** Encourage students to explore the arts through Reflections, the nation's oldest student arts program. Use PTA's program kits and apply for grants to engage families in safety, literacy, bullying prevention, digital safety and STEM.



Students

- **Learn & Gain Experience:** Students gain experience in leadership, advocacy, public speaking, teamwork and event planning.
- **Speak Up:** At all levels, but especially the secondary level – student voices inform that conversation to make positive improvements.
- **Lead:** Students have a seat at the table with school decision-makers including parents, school leaders, and community members.

Build strong communities to help every child reach their full potential



Schools

- **Boost parent involvement:** PTA programs provide a roadmap for collaboration among families, schools, and the community to support school improvement objectives.
- **PTA fights for funding.** PTAs advocate for every child at the local, state, and national levels. Gain access to advocacy tools that help you speak up on behalf of the needs of every child at your school.
- **Support & Resources:** PTAs focus on local communities and are networked globally. A team of professional and volunteer leaders is never more than a phone call or email away. PTAs are independent 501c3 organizations.



Harness the power of PTA to:

- Increase family engagement and volunteerism
- Implement programs to engage families in student success or school improvements
- Qualify for grants and awards to support your school
- Partner with other community organizations
- Enhance fundraising efforts
- Realize measurable results in student achievement



Want to recreate this flyer to use for your PTA?

Follow the link to the Utah PTA Idea Bank for this flyer and others.

<https://www.utahpta.org/ideas>

PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children. Membership in PTA is open to anyone who wants to be involved and make a difference for the education, health, and welfare of children and youth.

PTA LINE OF COMMUNICATION

MEMBER → LOCAL → COUNCIL → REGION → STATE → NATIONAL

NATIONAL → STATE → REGION → COUNCIL → LOCAL → MEMBER

BE A PTA PROFESSIONAL

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

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

HISTORY OF PTA

National PTA Fact | Utah PTA Fact

1897-1920

- 1897 The National Congress of Mothers founded by Alice McLellan Birney and Phoebe Apperson Hearst
- 1898 Utah Congress of Mothers was formed by Mrs. C. E. Allen, one of Utah's delegates to the National Congress
- 1900 The Charter was signed and National Congress incorporated under laws of District of Columbia
- 1903 Utah was disaffiliated with National PTA, but continued to work until reorganized in 1925.
- 1905 Resolutions endorsed federal aid for kindergartens and elementary schools and recommended salary increase for teachers
- 1906 National Congress of Mothers Magazine (forerunner of Our Children online magazine) first issued
- 1908 Importance of parent-teacher partnership recognized in change of name from National Congress of Mothers to Parent-Teacher Associations
- 1918 As a part of the war effort a health survey of preschool children was made. House Bill #44 passed adding to responsibilities for the Home School League "An act creating the office of Director of Health Education...and providing for the promotion of the physical welfare of children of preschool age."

1921 - 1960

- 1924 Adopted new name—National Congress of Parents and Teachers
- 1925 Utah joined the National Congress of Parents and Teachers
- 1926 The National Congress of Colored Parents and Teachers was organized by Selena Sloan Butler with much evidence of collaboration between NCCPT and NPTA.
- 1929 Utah won the National Banner for the greatest increase in mem-

bership and held the first annual convention of the Utah Congress of Parents and Teachers.

- 1935 Warm lunches were provided for 1,200 children who left home early and rode long distances in buses
- 1938 On May 15-20 the 42nd National Convention was held in Salt Lake City
- 1940 Articles of incorporation were obtained.
- 1941 School lunch program inaugurated on nationwide basis
- 1951 Every school in Utah had a PTA
- 1952 Board recommended PTAs work for fluoridation of community water supplies
- 1956 Credit was due to the Utah Congress for the legislative passage of driver education and library service bills.
- 1956 Goal of 10 million National PTA memberships reached and library services bill, long advocated by PTA, signed into law
- 1958 National PTA board formally authorized the use of PTSA (Parent Teacher Student Association) as a further incentive for student participation

1961 - 2000

- 1961 PTA motion picture Where Children Come First prepared for general distribution



- 1961 On January 2, the Utah Congress acquired its first permanent headquarters at 1037 East South Temple, Salt Lake City. In April, it moved into the new office.
- 1969 Published Telling the PTA Story;

The Poor, the School, and the PTA; The PTA Is for You: The Cultural Arts and the PTA; Information Guide: National PTA Project on Children's Emotional Health

- 1970 National PTA and National Congress of Colored Parents and Teachers united to serve all children and youth
- 1970 Critical Issues Conferences began – Now called Advocacy Conference
- 1974 Utah PTA marked the 50th year with an honorary luncheon for past presidents as well as a 50 year history booklet
- 1981 National PTA sponsored Family Reading Week
- 1981 Membership was 130,739, an increase of 27,966 members over 1980 numbers and State Leadership Convention was the largest ever held in Utah with 2500 delegates.
- 1988 The 92nd National PTA Convention was held in Salt Lake City
- 1990 Utah PTA won every major award given at the National PTA Convention in Indianapolis
- 1992 Due to Utah PTA efforts, the Utah Legislature passed seven bills dealing with the management of the school trust lands
- 1994 Passage of School Trust Lands Management Act
- 1997 National PTA succeeded in getting content information included in TV ratings system
- 1999 National PTA and the Partnership for Family Involvement in Education develop and distribute a national Teacher Preparation Kit to support family involvement in education and National PTA launches Building Successful Partnerships, a program for developing strong school-community ties.

2001 - 2020

- 2001 National PTA unveiled new logo and tagline "everychild. onevoice."
- 2001 Utah PTA moved to a new office at 5192 South Greenpine Drive in Murray, Utah. Elder L. Tom Perry dedicated the building.



- 2006 National PTA launched Take Your Family to School Week
- 2007 Utah PTA became founding member of Utahns for Public Schools, promoting public education and fighting for repeal of voucher legislation
- 2010 National PTA moved its headquarters from Chicago to Alexandria, Va.
- 2012 National PTA established the Jan Harp Domene Diversity and Inclusion Award to honor the late National PTA President who served from 2007-2009 and was one of PTA's greatest advocates for underrepresented families and communities.
- 2014 National PTA relaunched its School of Excellence program to strengthen family-school partnerships and make measurable progress in education, health and safety and arts and cultural exploration.
- 2016 Utah PTA was instrumental in the passage of Constitutional Amendment that increased and stabilized funds distributed to Utah schools from the permanent State School Trust Fund.
- 2018 National PTA passed Utah PTA Resolution "High Expectations for Students with Disabilities"
- 2019 - National PTA celebrates the 50th Year of Reflections program with nearly 1,000 student works of art from 47 states responding to the student-selected theme

Look Within progressed to the national level in the available arts categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, Visual Arts

2020 - 2025

- 2020 Reflections entries were first accepted online on the Utah PTA website with nearly 12,000 online entries and Utah PTA Leadership was canceled due to Covid 19.
- 2021 Award entries, scholarship entries, bylaws renewals and President reports were accepted on the Utah PTA website for the first time and the Utah PTA Leadership Convention was held as a hybrid conference for the first time with 350 virtual attendees and 350 in person attendees. Masks were required. Virtually attendees were able to vote through zoom polls.
- 2022 Held Historic Dual Legislative Conference and Leadership Convention as the same event in Washington DC to celebrate the 125th Anniversary of PTA.
- 2022 With the help of Senator Ann Millner, a State concurrent Resolution celebrating 125 years of PTA Advocacy work was passed and signed by the governor. February 17th was celebrated on

the Utah Senate Floor with a number of Utah PTA past presidents in attendance and with stories from state senators remarking the impact of PTA on their families.

- 2023 Continued to move forward navigating the new normal after Covid 19. Highlights include successful virtual, in person and hybrid meetings, events, conferences, conventions and advocacy work.
- 2024 Launched Utah PTA Leadership Academy to increase leadership training opportunities to those seeking leadership roles in PTA.
- 2024 National dues increase passed at virtual convention and will take effect in 2025.
- 2025 Utah PTA marks its 100 year and embarks on a Board Restructure to better serve the local PTA leaders and children of Utah in the future.



UTAH PTA FACTS

HISTORY: Utah PTA joined National PTA in 1925. Utah PTA is the largest child advocacy and volunteer organization in the state. PTA was established more than 100 years ago to address children's issues.

MEMBERSHIP: More than 60,000 voluntary members participate in over 600 local PTAs throughout the state.

ORGANIZATION: Utah is divided into 11 geographic PTA regions, each served by a region support committee. The region support committee works with the councils within the region and councils work with local PTA units. Local PTAs meet on a regular basis throughout the school year and work with administrators, teachers, staff, parents, and students. PTAs at the local level are valuable assets to their school communities by providing educational and parent involvement information, resources, events, and activities.

AFFILIATION: Utah PTA is an affiliate of the National PTA. National PTA is composed of 54 state congresses and more than 20,000 local units in all 50 states, the District of Columbia, U.S. Virgin Islands, Puerto Rico, and the Department of Defense Schools in Europe. State PTAs are the liaison between the local PTA and National PTA, helping each to function effectively and to support and sustain the other.

PARENTAL INVOLVEMENT: Utah PTA volunteers historically give thousands of hours of service to Utah's children in their local public schools each year. If this volunteer service was translated into real value, it would be worth millions of dollars. For the 2024 calendar year, Utah PTA Volunteers gave 925,915 hours of service with an equivalent monetary value of \$31,008,893.35.

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

IMPORTANT INFORMATION:

- ♦ Bylaws must be renewed every three years. Check the red stamp at the top right of the first page of your bylaws. This date will show if your bylaws are current or need to be renewed.
- ♦ PTA Unit ID Number needs to go on your membership remittance form and cards and Reflections entries. It is your PTA identification number, as assigned by National PTA.
- ♦ The EIN (Employer Identification Number) is needed for all IRS filings and the PTA's bank account. It is your IRS identification number.
- ♦ Find your bylaws online at utahpta.org/bylaws/search. Find your PTA and then click on the blue bylaws button to the left. All Board Members should have a copy of your Bylaws.

NATIONAL AND UTAH PTA PROGRAMS

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

CONFERENCES AND TRAININGS

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

UTAH PTA AWARDS AND GRANTS

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

UTAH PTA COMMITTEES

(open to all PTA members)

- ♦ Communications
- ♦ Leadership
 - Leadership Academy
 - Student Leadership
- ♦ Membership
- ♦ Programs Committee
 - Arts Grants
 - Awards
 - Battle of the Bands
 - Diversity and Inclusivity
 - Grants
 - Military Families
 - Reflections
 - School of Excellence
- ♦ Advocacy Resolutions Support
- ♦ Digital Wellness
- ♦ History
- ♦ Special Needs
- ♦ Technology
 - Givebacks
- ♦ Trust Lands

UTAH PTA COMMISSIONS

(open to all PTA members)

- ♦ Community Engagement
- ♦ Education
- ♦ Family Life
- ♦ Health
- ♦ Safety

WHAT ARE THE NATIONAL STANDARDS?

Families are essential partners to schools...

...In the shared mission to help every child reach their full potential.

PTA's National Standards for Family-School Partnerships set the bar for how schools and parent organizations work together to support student success.

The Standards have contributed to greater awareness and capacity for improving family-school partnerships across the country and internationally for over 20 years.

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

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

1

Welcoming All Families Into The School Community

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

2

Communicating Effectively

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

3

Supporting Student Success

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

4

Speaking Up For Every Child

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

5

Sharing Power

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

6

Collaborating With Community

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

Research shows that when families have a better relationship with the school it leads to greater gains in academic achievement, enhanced emotional development and behavior. It not only benefits your own child, but all the children in your school community. We can take simple steps to make our school communities stronger. To start, take a look at your school and see how you would rate your school in the following categories. Are you excelling, progressing, emerging, or below the scale?



For more information about the National Standards and how to implement them within your PTA/PTSA, visit: utahpta.org/national-standards-family-school-partnerships

TRANSFORMATIVE FAMILY ENGAGEMENT



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

The solution? Transformative Family Engagement.

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

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

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

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



4 Principles of Transformative Family Engagement

INCLUSIVE

Embracing and valuing diverse perspectives.



INDIVIDUALIZED

Meeting the unique needs of every family and child.



INTEGRATED

Connecting and aligning with the educational system.



IMPACTFUL

Empowering families to support their child's success.



PTA ACRONYM LIST

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

UTAH PTA PAST PRESIDENTS



Back row: Julie Cluff, Ilene Mecham, Carmen Snow, Dawn Davies, Linda Parkinson
 Front Row: JoAnn Nielson, Stacey Mollinet, Corey Fairholm, Jeana Stockdale, Liz Zentner
 Photo February 2025

2023–2025: Corey Fairholm
 2021–2023: Stacey Mollinet
 2019–2021: Laney Benedict
 2017–2019: Jeana Stockdale
 2015–2017: Dawn Davies
 2013–2015: Liz Zentner
 2011–2013: Gainell Rogers
 2009–2011: Ilene Mecham
 2007–2009: Marilyn Simister
 2005–2007: Carmen Snow
 2003–2005: JoAnn Neilson
 2001–2003: Susan Dayton
 1999–2001: Colleen Taylor
 1997–1999: Barbara Willie
 1995–1997: Linda Parkinson
 1993–1995: Mareid Horton
 1991–1993: Joyce Muhlestein
 1989–1991: Pat Hales
 1987–1989: Darlene Gubler
 1985–1987: Lenora Plowthow
 1983–1985: Donna Davies

1981–1983: Gayle Judd
 1978–1981: Darlene Hutchison
 1976–1978: Mrs. Jack Smith
 1974–1976: Dixie Nelson
 1972–1974: Joan Burnside
 1970–1972: Lila Bjorklund
 1967–1970: Mrs. Youngs McGregor
 1964–1967: Mr. Rowan C. Stutz
 1961–1964: Mrs. James W. Urie III
 1959–1961: Dr. Ellvert H. Himes
 1958–1959: Mrs. George H. Jones
 1955–1958: Mrs. Cecil Baker
 1952–1955: Mrs. Donald E. Rose
 1947–1952: Mrs. Charles L. Walker
 1945–1947: Mrs. Eric A. Johnson
 1943–1945: Mrs. Edmund P. Evans
 1938–1943: Mrs. Lee K. Nicholson
 1935–1938: Mrs. Arch J. West
 1931–1935: Mrs. John K. Hardy
 1925–1931: Mrs. William Reid



PRESIDENT HANDBOOK
PRESIDENT TOOLS

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

"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



As a PTA President, you are entrusted with the leadership and management of your PTA, ensuring that it operates effectively and in alignment with its mission. Your role involves a variety of responsibilities that require strong organizational, financial, and communication skills.

Leadership and Meetings

- ♦ Chairing Meetings: Lead executive, board and general meetings to discuss and manage the plans and business of your PTA.
- ♦ Financial and Legal Oversight: Actively participate in financial and legal matters, ensuring compliance with Utah PTA standards and maintaining good standing.
- ♦ Bylaws Familiarity: Be well-versed in the PTA bylaws to ensure all activities and decisions are in accordance with them.
- ♦ Reporting: Submit three reports yearly online.
- ♦ Records: Maintain records according to financial retention guidelines.

Board and Community Engagement

- ♦ Board Responsibilities: Understand the roles and responsibilities of all board members and ensure they are fulfilled while ensuring procedures books are updated and passed to predecessors.
- ♦ Liaison Role: Serve as a liaison with school administration and community partners to foster strong relationships and collaboration.
- ♦ Regular Check-ins: Maintain regular communication with officers and committees to ensure the overall plan is on track.
- ♦ Membership: Conduct ongoing membership drive ensuring payment of state and national dues on the 25th of each month.

Problem-Solving and Representation

- ♦ Identify Challenges: Recognize challenges and proactively seek solutions.
- ♦ Program Familiarity: Be knowledgeable about all PTA programs and resources to effectively guide and support initiatives.
- ♦ Community Representation: Represent the PTA to the broader community, advocating for its mission and goals.
- ♦ Council: Attend all council meetings and training opportunities to receive PTA resources, training and collaboration time.

Communication and Volunteer Management

- ♦ Ongoing Communication: Keep open lines of communication with council, region, and state PTA to stay informed of important notices and updates.
- ♦ Member Engagement: Maintain ongoing communication with PTA members to keep them informed and engaged.
- ♦ Volunteer Recruitment: Actively recruit and mentor volunteers and future leaders to ensure a robust and sustainable organization.
- ♦ Event Participation: Volunteer at events whenever possible to show support and leadership.

Effective PTA Presidents possess leadership, planning, and public speaking skills. By fulfilling these responsibilities with dedication and professionalism, you can create a positive and impactful environment for your PTA, fostering family engagement and community support.

For more information, visit utahpta.org/president.

RESPONSIBILITIES OF PTA LEADERS AND KEYS TO PRESIDENTIAL SUCCESS



Engagement and Participation

- ♦ Accept and Contribute: Embrace your position and actively participate in board discussions.
- ♦ Constructive Participation: Engage constructively in meetings and adhere to PTA purposes, mission, and bylaws.
- ♦ Informed Leadership: Understand the PTA structure and become well-informed about all PTA programs.

Adherence and Development

- ♦ Follow Procedures: Adhere to National PTA and Utah PTA procedures, meet deadlines, and fulfill assignments promptly.
- ♦ Leadership Development: Focus on developing and strengthening leadership skills, and learn to delegate tasks effectively.
- ♦ Training and Inclusion: Recognize the value of training, attend relevant events, and ensure inclusive representation from all areas of the school community.

Why PTA Leaders Succeed

Focus and Attitude

- ♦ Child-Centric Agenda: Maintain a singular focus on the welfare of children.
- ♦ Welcoming Environment: Make each member feel welcome and help them understand the PTA's purposes and mission.
- ♦ Positive Attitude: Approach your role with a positive attitude and a thorough understanding of the bylaws and President Handbook.

Resource Utilization and Team Building

- ♦ Resource Familiarity: Become familiar with available resources and attend all required training and meetings.
- ♦ Effective Communication: Use and follow an agenda, distribute materials appropriately, and delegate work efficiently.
- ♦ Supportive Climate: Create a supportive and respectful environment where team members feel valued and can grow.
- ♦ Training and Recognition: Train your board on necessary leadership skills and remember to express gratitude for their efforts.

Successful PTA leaders are those who focus on the mission of supporting children, foster an inclusive and positive environment, utilize available resources effectively, and build a strong, collaborative team. By adhering to these principles, PTA presidents can lead their organizations to achieve their goals and make a meaningful impact.

For more information on specific job duties of the officers, utahpta.org/executive-committee

INFORMATION FOR BOARD AND EXECUTIVE COMMITTEE MEMBERS



Essential Information for Board Members

Basic Details: Provide each board member with an information sheet that includes:

- ♦ PTA Unit ID number
- ♦ EIN (Employer Identification Number)
- ♦ Bylaws expiration date
- ♦ Council name and president contact information (if applicable)
- ♦ Links to PTA social media pages or PTA website

Additional Information: Include a board directory, meeting dates, and a calendar of PTA and school events.

Essential Information for Executive Committee Members

Financial and Online Accounts: Ensure transparency by sharing account and login information, including:

- ♦ Bank account details (name, number, check signers, and read-only login information)
- ♦ Login information for financial platforms (e.g., PayPal, Square, Stripe)
- ♦ Access to PTA social media sites (consider making them admins)
- ♦ Change account passwords annually for security

For more information about specific jobs, utahpta.org/executive-committee

STANDING RULES

- ♦ Purpose: Outline procedures not included in the bylaws, ensuring they do not conflict with them.
- ♦ Content: May include meeting times and locations, officer responsibilities, and management of PTA supplies and equipment.
- ♦ Flexibility: Can be amended or rescinded at any time by a two-thirds vote or a majority vote with 14 days' notice.
- ♦ Review: It is advisable to review and adopt standing rules annually to maintain continuity in programs and procedures.



For more detailed information on standing rules, refer to the Bylaws section of the handbook or visit utahpta.org/guidelines-standing-rules

ORGANIZE YOUR BOARD



Board Composition

Members of a local PTA/PTSA board are either elected or appointed, as specified in your bylaws. The board should include representation from all geographic areas and reflect the diversity of your school community.

Key Points for Board Members:

- ♦ Job Descriptions and Training: Ensure all board members have clear job descriptions and receive appropriate training.
- ♦ Orientation: Provide an orientation on PTA purposes, bylaws, policies, procedures, and financial management.

Required Elected Positions:

- ♦ President
- ♦ President-elect
- ♦ Secretary
- ♦ Treasurer
- ♦ Vice Presidents: The Principal and Teacher VP are required per bylaws which also specify the number of other required VPs for your PTA. Your Standing Rules specify the specific position of VPs your PTA has. i.e.: Leadership, Fundraising, or Legislative VP, etc.

Election Process:

- ♦ Nominations: Presented by the nominating committee and elected by the general membership.

Potential Appointed Positions:

- ♦ Commissioners: Oversee areas such as community engagement, education, family life, health, individual development, safety, and student leadership.
- ♦ Check your Bylaws to determine if commissioner positions are elected or appointed.
- ♦ Appointees and committee chairs: For roles such as public relations, communications, reflections, membership, fundraising, teacher appreciation, social media, diversity and inclusivity, special needs, military families, male engagement, healthy lifestyles, and various school events.

Required Committees

- ♦ Annual Financial Reconciliation (AFR)
- ♦ Nominating Committee
- ♦ Election Committee

Conclusion

Organizing your board effectively ensures that all members are well-informed, trained, and ready to contribute to the PTA's mission. By including diverse representation and clearly defining roles, your PTA can operate smoothly and achieve its goals. For more information, refer to the bylaws and additional resources available on the Utah PTA website.

For more information on organizing your board, utahpta.org/organizing-your-board

SAMPLE BOARD OF DIRECTORS

Local Bylaws Article IX, 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 IX, Sections 2 and 3 | Appointed

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 Character 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 IV, Section 1a-g | PTA in good standing

AFR - Article VII Section 6
Nominating Committee - Article VI, Section 5
Election Committee

SPECIAL COMMITTEES

Article IX, Sections 5 and 6 | 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 for more information

THE PRINCIPAL VICE PRESIDENT



The principal is a vital member of the PTA Executive Committee and often provides continuity in leadership. A supportive principal encourages teacher and staff participation in PTA activities and cooperates with the PTA in using school facilities. Meetings can be held at the school with the principal's permission or at another agreed-upon location.

Key Points for a Positive Partnership:

- ♦ Open and Honest Communication: Regular and transparent communication between the PTA president and the principal is essential.
- ♦ Understanding Roles and Responsibilities: Both parties should clearly understand their respective roles to avoid conflicts.
- ♦ Establishing Common Goals and Visions: Collaborate to set shared objectives focused on student success.
- ♦ Working Collaboratively: Joint efforts should aim at enhancing student achievement.
- ♦ Respecting Opinions and Building Trust: Mutual respect and trust are foundational for a strong partnership.
- ♦ Engaging Families and Staff: Actively pursue family and staff involvement in PTA activities.
- ♦ Building Community Relationships: Foster positive relationships within the school community.

For more information about working with your principal, utahpta.org/administrative-vp

Take a look at the exclusive Administrative VP handbook, utahpta.org/administrative-vp-handbook

THE TEACHER VICE PRESIDENT

The Teacher Vice President (VP) serves as a crucial link between the faculty and the PTA board, providing valuable feedback on PTA programs and procedures. The Teacher VP should communicate PTA information to the faculty and encourage their participation.



Key Points for Effective Collaboration:

- ♦ Faculty Communication: Ensure the Teacher VP disseminates PTA information to the faculty.
- ♦ Meeting Attendance: Schedule board meetings at times that allow the Teacher VP to attend, even if only for part of the meeting.
- ♦ Principal's Support: The principal may recommend a teacher with a prep period during the PTA meeting time or provide an aide to facilitate attendance.
- ♦ Agenda Management: Place the Teacher VP's report early in the meeting agenda to accommodate their schedule.

By fostering a collaborative environment and maintaining open lines of communication, the PTA president, principal, and Teacher VP can work together effectively to support the school's mission and enhance student success.

For more information about working with your Teacher VP or how to be the Teacher VP, utahpta.org/teacher-vp

ORGANIZING YOUR COMMISSION/ COMMITTEE/PROGRAM/EVENT



The primary goal of a PTA board is to develop and implement plans for commissions, committees, programs, and events that address the interests and needs of the school community.

Definitions

- ♦ **Commission:** Oversees several committees, programs, or events with a specific focus (e.g., Community Engagement, Education, Health).
- ♦ **Committee:** Plans and executes specific events or programs (e.g., Reflections, Safety Patrol).
- ♦ **Program:** An initiative deemed important by the membership through a needs assessment (e.g., Grad Night, Family Nights).
- ♦ **Event:** A one-time occurrence of a program (e.g., guest speakers, carnivals).

Steps for Success

Step 1: Conduct a Needs Assessment

- ♦ Survey the community to identify important issues and interests.

Step 2: Develop a Plan of Action

- ♦ Set goals based on the needs assessment.
- ♦ Consider the impact on teachers, students, parents, and the community.
- ♦ Stick to the given budget.
- ♦ Use a procedure book for guidance and documentation.

Step 3: Planning Meetings

- ♦ Assign roles and responsibilities.
- ♦ Determine the budget.
- ♦ Engage community resources.
- ♦ Reserve facilities and prepare materials.
- ♦ Publicize the event through various channels.

Step 4: Execute the Program or Event

- ♦ Ensure all plans are followed and the event runs smoothly.

Step 5: Evaluate

- ♦ Gather feedback from both the committee and the community.
- ♦ Document what worked and what didn't for future reference.

Importance of Teamwork

Successful board members value cooperation, collaboration, and communication. They operate with integrity, welcome diversity, and maintain confidentiality. By working together, a PTA board can significantly impact the school and community.

For additional resources, visit utahpta.org/lead-way

TRANSITION PERIOD FOR PTA OFFICERS



The transition period between outgoing and incoming PTA officers is crucial for ensuring continuity and building on past successes. Effective leadership is demonstrated by how well the new team is prepared to continue the work of the PTA.

Key Points

Timing and Sensitivity

- ♦ Support Current Board: Recognize that the current PTA board still has significant work to complete and continue to offer support and encouragement.
- ♦ Early Information Sharing: Begin sharing information and materials as soon as new officers are elected. Including new officers in final meetings or activities can facilitate a smoother transition.

Transition Activities

- ♦ Pre-July 1 Planning: Transition time begins at election time and goes through June 3th and planning of the following year should happen in this time.
- ♦ Procedure Book: Create a comprehensive and organized procedure book for each position, which can be in electronic format, to document processes and important information.
- ♦ Material Handover: Pass on all useful materials to incoming officers, retaining copies only if necessary.

Supporting New Leadership

- ♦ Step Back: Allow new leaders to gain confidence, try new ideas, and improve on past work without interference.
- ♦ Be Available: Offer practical guidance and continuity as a resource for the new leadership team.

Conclusion

A well-managed transition period is essential for the ongoing success of the PTA. By planning, organizing, and communicating effectively, outgoing officers can ensure that their successors are well-prepared to build on their achievements and continue the PTA's mission.

For more information on the transition period, utahpta.org/transition-period

LOCAL PTA/PTSA PRESIDENT'S CHECKLIST



Key Responsibilities and Actions

Bylaws and Governance

- ☐ Review Bylaws: Obtain and review a copy of your local PTA bylaws. Ensure they are current and renewed every three years.
- ☐ Board Positions: Fill board positions with appointees, ensuring representation from all areas of the school community.
- ☐ Transition: Meet with the outgoing president for a smooth transfer of materials and information.

Planning and Organization

- ☐ Transition: Schedule meetings with the principal and board members, to plan the calendar year, prepare the budget, conduct a needs assessment and make goals for the coming year.
- ☐ Appoint: In consultation with the Executive Committee, appoint necessary commissioners and committee chairs to run programs and events for the coming year.
- ☐ Training: Ensure all board members understand their responsibilities and receive necessary training.
- ☐ Procedure Books: Obtain and update procedure books from outgoing board members.

Financial Management

- ☐ Banking: Assist the treasurer in making necessary name changes at the bank after July 1.
- ☐ Budget Preparation: Work with the treasurer and board to prepare a budget for the coming year, ensuring funds support program needs and are available for leadership training.
- ☐ Financial Reconciliation: Ensure the outgoing treasurer completes a year-end financial report and prepares for the Annual Financial Reconciliation (AFR) by August 1. Ensure annual financial report is given to general membership at first meeting of the year.

Communication and Reporting

- ☐ Council: Identify your council, attend relevant meetings, and maintain communication with council and region leaders. President, President Elect and Principal or their designees should attend all council meetings.
- ☐ Reports: ensure all required reports are submitted online three times a year.
- ☐ Financial Reporting: Ensure the treasurer has submitted electronically both the End of Year and Beginning of Year documents.

Membership and Engagement

- ☐ Membership Drives: Conduct membership drives throughout the year and maintain a membership database.
- ☐ Volunteer Recruitment: Recruit and mentor volunteers and future leaders, ensuring ongoing communication with members.
- ☐ Advocacy: Be aware of annual Utah PTA legislative priorities and attend all advocacy conference or send representative from your PTA.

Meetings and Events

- ☐ General Membership Meetings: Held at least 3 times a year to conduct the business of your PTA.
- ☐ Board Meetings: Meet with your board at least once a month where plans are made for PTA program and events. Ensure the principal, teacher and treasurer reports are made, and ensure timely collection of volunteer hours.
- ☐ Executive Meetings: Meeting of elected officers to plan meetings dates and times, budgets and keep PTA purposes and goals on track.
- ☐ Principal Collaboration: Maintain regular communication with the principal, who serves as the administrative vice president of the PTA.
- ☐ Events: The president is an ex-officio member of all committees and the official representative of PTA and should attend events, programs and meetings of the PTA.
- ☐ Utah PTA Leadership Convention: Annual training offered by Utah PTA for all local and council board members to learn and grow in their PTA position. Budgets should cover for this training yearly for at least 2 board members, but you should take as many as you can.

CALENDAR AND TIMELINE



A complete President Timeline and calendar can be found at: utahpta.org/calendering-plan-out-your-year

Importance of a Calendar

- ♦ Minimizes conflicts with other activities.
- ♦ Allows for effective planning and coordination.
- ♦ Ensures ample spacing of major events.

Key Calendar Items

- ♦ Meetings: Board, Executive Committee, Council, School Board.
- ♦ Needs assessments, membership drives, programs, events, fundraisers.
- ♦ General membership meetings for budget approval, nominating committee election, officer elections, and bylaw changes.
- ♦ Utah PTA Convention, Conferences and training.
- ♦ Annual Financial Reconciliation (AFR) and report deadlines.
- ♦ Teacher appreciation and other special events.
- ♦ Deadlines for grants, awards and reports.

New Officer Transition Timeline

MARCH

- ♦ Election of officers,
- ♦ Start transition period
- ♦ Plan for training.

APRIL

- ♦ Enter incoming board information to *Givebacks*
- ♦ Review bylaws
- ♦ Fill appointed board positions
- ♦ Conduct needs assessment
- ♦ Attend pre-convention training.

MAY

- ♦ Plan calendar with principal
- ♦ Begin budgeting process
- ♦ Attend Utah PTA Leadership Convention
- ♦ Join Utah PTA social media pages and groups

JUNE

- ♦ Attend council training
- ♦ Meet with board members
- ♦ Pass procedure books
- ♦ Plan membership goals
- ♦ Prepare for fiscal year-end
 - Year-End Financial Statement
 - Annual Financial Reconciliation report (AFR),
 - E-filed/Approved IRS Form 990
 - Sales Tax Refund Request.

Month to Month at a Glance

JULY

- ♦ Official start of fiscal year
- ♦ Plan membership campaign
- ♦ Review financial records
- ♦ Incoming treasurer coordinates signatures to be changed at the bank

AUGUST

- ♦ Submit year-end financial documents on Givebacks by Aug 1
- ♦ Plan Reflections program
- ♦ Kick off membership drive

SEPTEMBER

- ♦ Kick off Reflections program
- ♦ Observe various awareness months

OCTOBER

- ♦ Submit beginning-of-year documents
- ♦ Attend Utah PTA Advocacy Conference
- ♦ Continue membership drive

NOVEMBER

- ♦ Submit Report #1
- ♦ Prepare for December deadlines
- ♦ Observe various awareness months:

DECEMBER

- ♦ Ensure bylaws and good standing requirements are met
- ♦ Elect Nominating Committee.

JANUARY

- ♦ Submit local PTA award applications
- ♦ Attend legislative sessions
- ♦ Plan for Report #2.

FEBRUARY

- ♦ Submit Report #2
- ♦ Participate in PTA Day at the Capitol
- ♦ Conduct officer elections
- ♦ Submit membership and leadership awards
- ♦ Celebrate PTA founder's day on February 17th.

MARCH

- ♦ Hold local elections
- ♦ Start the transition period

APRIL

- ♦ Attend Utah PTA Reflections Awards
- ♦ Register for Leadership Convention
- ♦ Enter incoming board information
- ♦ Facilitate needs assessment with incoming officers
- ♦ Attend pre-convention training

MAY

- ♦ Attend Utah PTA Leadership Convention
- ♦ Wrap up business
- ♦ Plan transition meeting

JUNE

- ♦ Submit Report #3
- ♦ Close books
- ♦ Prepare for fiscal year-end
 - Year-End Financial Statement
 - Annual Financial Reconciliation report (AFR),
 - E-filed/Approved IRS Form 990
 - Sales Tax Refund Request.
- ♦ Review budget with incoming officers.

STANDARDS OF AFFILIATION FOR GOOD STANDING



To maintain good standing with the Utah PTA, local PTA units must adhere to specific standards as outlined in the Local PTA Bylaws, Article IV: Relationship with National PTA and Utah PTA, Section 1. Compliance with these standards ensures eligibility for materials, services, awards, and participation in PTA programs.

Bylaws and Membership

1. Adherence to Bylaws: Follow the purposes, bylaws, basic principles, and procedures of the PTA.
2. Membership Dues: Remit all National PTA and Utah PTA portions of the dues to Utah PTA by the 25th of each month. Membership must exceed 10 members to be in good standing.

Financial and Legal Compliance

3. Bylaws Approval: Ensure bylaws are approved every three years to participate in Utah PTA-sponsored activities.
4. Year-End Financial Review: Conduct a Year-End Financial Review and complete the Annual Financial Reconciliation (AFR) by August 1.
5. IRS Filing: File the appropriate IRS Form 990 by September 1.
6. Budget Approval: Have the annual budget approved by the membership by October 1, with meeting minutes.
7. Officer Information: Submit a list of incoming officers with contact details by May 1.
8. Proof of Insurance: Purchase appropriate insurance by October 1.
9. Conflict of Interest and Fiscal Management Forms: Submit signed forms by October 1.

Financial Procedures

10. Responsible Financial Practices:
 - Three money counters for all funds.
 - Two signers on all checks.
 - Immediate bank deposits following events.
11. Principal's Approval: Principal must sign each check request form.

Training and Meetings

12. Leadership Training: At least two officers must attend one PTA leadership training session annually.
13. Meeting Minutes: Take and approve minutes at every PTA board meeting, general membership meeting, and PTA committee meeting.
14. Nominating Committee: Elect a nominating committee to nominate eligible candidates for officer positions.
15. Officer Elections: Elect officers including one president, one president-elect, one administrative vice president, one teacher vice president, one secretary, and one treasurer.
16. Report Submissions: Submit Reports #1, #2, and #3 by their respective due dates.

Consequences of Non-Compliance

Failure to adhere to these standards results in ineligibility for:

- ♦ Materials or services from National PTA and Utah PTA.
- ♦ Awards and participation in PTA programs (e.g., Reflections, Battle of the Bands).
- ♦ Voting privileges at Utah PTA conventions and conferences.
- ♦ Receive sales tax refunds.
- ♦ After two years of non-compliance, the unit will be reported to the IRS as not in good standing, leading to the loss of tax-exempt status and charitable solicitations.

Conclusion

Maintaining good standing with the Utah PTA is crucial for the effective operation and recognition of your local PTA unit. Adhering to these standards ensures compliance with legal and financial requirements, enabling your PTA to fully participate in and benefit from PTA programs and resources. For more detailed information, refer to the Utah PTA website and the Local PTA Bylaws.

For more information on Good Standing, utahpta.org/what-good-standing

STANDARDS OF AFFILIATION					
Required by	#	Requirement	Fiscal Year	Best Practices/Specifics (Utah PTA Fiscal Year is July 1- June 30)	Date(s) Completed
Utah PTA, IRS	1	Bylaws followed	Current	Adheres to the purposes, bylaws, basic principles and procedures of the PTA	
Utah PTA, IRS	2	Membership dues paid	Current and Prior	Remits all National PTA and Utah PTA portions of the dues to Utah PTA by the 25th of each month (not applicable to Councils)	
Utah PTA	3	Bylaws approved every 3 years	Current	Bylaws must be current to participate in Utah PTA sponsored activities (Battle of the Bands, Reflections, awards, sales tax refund)	
IRS, DCP, Utah PTA	4	Year end financial review/ Annual Financial Reconciliation	Current and Prior	Year End Financial Review was conducted by August 1 and the Annual Financial Reconciliation (AFR) completed by August 1	
IRS	5	Form 990 filed	Prior	Filed the appropriate IRS Form 990 no later than August 1	
Utah PTA	6	Budget approved	Current	Budget was approved by the membership by October 1 with meeting minutes	
Utah PTA	7	Office Names/ Contact Info	Current	List of incoming officers with addresses, phone numbers, and email addresses on file with Utah PTA	
State of Utah	8	Proof of Insurance	Current	Purchased appropriate insurance by October 1	
Utah PTA	9	Forms Signed	Current	Signed Conflict of Interest form and Basic Fiscal Management Form	
DCP, Utah PTA	10	Financial Procedures	Current	Three money counters, two signers on all checks and money is deposited into bank account immediately following any event	
DCP, Utah PTA	11	Financial Procedures	Current	Principal must sign each check request form	
Utah PTA	12	Training for leaders	Current	At least two (2) officers attend one PTA leadership training session annually	
Utah PTA, IRS	13	Minutes	Current	Minutes must be taken and approved at every PTA board meeting, general membership meetings, and PTA committee meetings	
Utah PTA	14	Nominating Committee Elected	Current	PTA members were elected to a nominating committee to nominate an eligible person for each officer of elections are to be held	
Utah PTA	15	Elections	Current	Officers of this PTA/PTSA shall be one (1) President, one (1) President-elect, one (1) administrative vice president, one (1) teacher vice president, one (1) Secretary, and one (1) Treasurer	
Utah PTA	16	Reports	Current	Reports #1, #2, and #3 submitted by associated due dates	

MEETINGS OVERVIEW



Meetings President attends and chairs	<ul style="list-style-type: none"> ♦ General Membership Meetings: At least three per year, quorum required, budget and election approvals. ♦ Executive Committee Meetings: Elected officers, planning, budgeting, filling vacancies. ♦ Board Meetings: Regular meetings with reports from officers and committees.
Meetings President attends	<ul style="list-style-type: none"> ♦ Council/Region Meetings: Training and information exchange. ♦ Utah PTA Leadership Convention: Annual training and networking event. ♦ Advocacy Conference: Fall conference on legislative issues. ♦ PTA Day at the Capitol: Advocacy event during the legislative session. ♦ Local School Board Meetings: Learn about school district policy and procedures.

For more information about meetings utahpta.org/guide-meetings

TYPES OF MEETINGS

General Membership Meetings

- ♦ Frequency: At least three per year.
- ♦ Quorum: Required to conduct business and vote.
- ♦ Purpose: Adopt budget, elect Nominating Committee, report nominees, hold officer elections, and present annual reports.
- ♦ Minutes: Taken and financial reports given at each meeting.
- ♦ Combination: Often combined with school events like Back to School Night.

Executive Committee Meetings

- ♦ Members: Elected officers as defined in the bylaws.
- ♦ Frequency: Held during times when the board is not meeting, such as summer.
- ♦ Responsibilities: Plan General Membership Meetings, participate in budgeting, fill vacancies, appoint an auditor or AFR Committee, and receive financial reports.
- ♦ Minutes: Taken and financial reports given.

Board Meetings

- ♦ Members: Executive Committee, commissioners and committee chairs.
- ♦ Frequency: Regular (usually monthly) throughout the year.
- ♦ Purpose: Discuss plans, receive reports from officers, committees, and event chairs.
- ♦ Attendance: Open to all PTA members.
- ♦ Minutes: Taken and financial reports given.

Council Meetings

- ♦ Purpose: Receive information from Utah PTA, receive training, and exchange ideas with other leaders.
- ♦ Attendance: Local PTA presidents, president-elect, and principal. If unable to attend, send another officer.

Utah PTA Leadership Convention

- ♦ Purpose: Annual training, information sharing, and networking event.
- ♦ Activities: Classes for each board position, vendor hall for networking with suppliers and community resources.
- ♦ Business and Resolutions Meeting: Vote on resolutions and bylaws amendments.

Advocacy Conference

- ♦ Purpose: Educate members about issues and legislative processes.
- ♦ Activities: Business and Resolutions Meeting to vote on resolutions and bylaws amendments.

PTA Day at the Capitol

- ♦ Purpose: Advocate for bills affecting children and youth.
- ♦ Activities: Lunch with legislators, youth meetings, and mock debates.

RUNNING EFFECTIVE MEETINGS



Preparation

- ♦ Schedule: Choose convenient times for the majority.
- ♦ Purpose: Have a clear agenda to ensure significant accomplishments.
- ♦ Facilitation: Start and end on time, keep discussions focused, and use parliamentary procedure.
- ♦ Engagement: Use activities and visual aids to involve participants.
- ♦ Quorum: Ensure the minimum number of members required to conduct business is present.
- ♦ Minutes: Record all business transacted as part of the organization's permanent file.
- ♦ Social Time: Consider adding social time before or after the meeting for networking.

Essential Materials for Meetings

- ♦ Bylaws and standing rules.
- ♦ EIN and PTA Unit ID number.
- ♦ School/district policies.
- ♦ Previous meeting minutes.
- ♦ Treasurer's reports.
- ♦ Approved budget.
- ♦ Board Directory.
- ♦ Region and council information.
- ♦ Membership roster.
- ♦ Calendars (school district, region, council, local school).
- ♦ Utah PTA handbooks.

For more information about chairing a meeting, utahpta.org/running-meetings

Agendas

- ♦ Components: Call to order, opening ceremonies, approval of agenda and minutes, officer and committee reports, special business, unfinished and new business, calendar items, and adjournment.



For more information on agendas, utahpta.org/agendas

Minutes

- ♦ Content: Record of all business transacted, attendance, reports, actions taken, and approval of minutes.
- ♦ Storage: Permanent historical records, kept for IRS audits, documentation of programs and procedures, and ensuring bylaws and budgets are followed.
- ♦ Distribution: Provide copies to members, read and approve at subsequent meetings, and store in a permanent record.



For more information on minutes, utahpta.org/minutes

PARLIAMENTARY PROCEDURE



Purpose of Parliamentary Procedure

Parliamentary procedure is a structured set of rules for conducting meetings of organized groups to achieve their goals fairly and efficiently. It ensures:

- ♦ Justice and Courtesy: Fair treatment and respect for all members.
- ♦ Order Maintenance: Structured and orderly conduct of meetings.
- ♦ Focused Consideration: Addressing one item at a time.
- ♦ Majority Rule: Decisions are made based on the majority vote.
- ♦ Minority Rights: Protecting the rights of minority opinions.

Key Terminology

- ♦ Bylaws: Specific rules adopted by a PTA that must be followed, reviewed every three years for necessary amendments or renewal.
- ♦ Chair: The presiding officer of the meeting.
- ♦ Majority Vote: More than half of the votes cast.
- ♦ Motion: A formal proposal to bring a subject before the assembly for consideration and action, starting with "I move."
- ♦ Quorum: The minimum number of members required to be present to conduct business, as specified in the bylaws.
- ♦ Standing Rules: Procedures not included in the bylaws, amendable by a two-thirds vote or a majority vote with prior notice.

Steps to Process a Main Motion

1. Member Addresses the Chair: "Madam President."
2. Chair Recognizes the Member: "The chair recognizes—"
3. Member Makes a Motion: "I move that—"
4. Another Member Seconds the Motion: "Second" or "I second the motion."
5. Chair States the Motion and Opens Debate: "It is moved and seconded that ... Is there any discussion?"
6. Chair Recognizes Members Wishing to Speak.
7. Chair Puts the Question to a Vote: "The question is on the motion (repeats the motion). Those in favor say 'aye.' Those opposed say 'no.'"
8. Chair Announces the Result of the Vote: "The Ayes have it, and the motion is adopted. We will (state action to be taken)." or "The Nos have it, and the motion fails."
9. Chair Continues with the Next Item of Business.

Voting Methods

- ♦ 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.'"
- ♦ For more information about parliamentary procedure, utahpta.org/parliamentary-procedure

For more information on how to make a motion, utahpta.org/motions-voting

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 in-person meetings with a few additional considerations.

Selecting a Platform

There are several platforms available for virtual meetings. Popular options include Zoom, Google Meet, and Microsoft Teams, which offer free versions with time limits (40-60 minutes). Other platforms, such as Facebook Messenger, are free for unlimited time but may have restrictions, such as requiring all participants to be Facebook friends. For meetings expected to exceed the free time limit, consider announcing at the beginning that participants should re-enter the meeting using the same link to continue.

Preparation Before the Meeting

Virtual meetings require extra preparation. Email the agenda, minutes, and any handouts ahead of time along with the meeting link. Designate a co-host to assist with admitting participants, monitoring the chat, and muting attendees if necessary. Prepare slides with the information to be shared, ensuring the PTA logo is included. Decide on the voting method and create polls or surveys in advance if needed. Determine how participants will indicate their desire to speak (e.g., raising hands, using the chat). Familiarize yourself with the platform controls and conduct a practice session if this is your first virtual meeting.

On the Day of the Meeting

Log in a few minutes early to ensure everything is set up correctly. Minimize background noise and ensure good lighting without a back lit window. Start the meeting on time and explain the voting process and how participants can indicate they wish to speak. Maintain a positive demeanor and keep the meeting on track despite any technical issues. Conclude the meeting on a high note by recapping key points, outlining next steps, and thanking attendees. Consider adding a short post-meeting networking session for those who wish to socialize.

Voting

Routine voting, such as approving the agenda and minutes, can be conducted via voice vote or by raising hands. Some platforms offer features for indicating yes or no or using thumbs-up reactions. For more complex votes, such as those with multiple options or potential controversy, use polling or surveys. Note that polling may not be available in the free versions of some platforms. Prepare polls in advance to streamline the meeting. Alternatively, email a survey (e.g., Google Forms, Survey Monkey) to attendees. Announce the vote, launch the poll or send the survey, wait for responses, and then display or announce the results. The secretary should record the vote results in the minutes. Proxy voting, where someone else votes on behalf of an absent member, is prohibited by the bylaws.

For more information about virtual meetings and voting, visit utahpta.org/virtual-meetings-voting

NEEDS ASSESSMENT INFORMATION



A needs assessment is a critical tool for PTA boards to set goals that align with the needs of the school community. It helps ensure that the PTA's efforts are effective and relevant.

Target groups—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 or group Telephone	Distributed at school activities, sent home, or door-to-door	Email out a survey in Google Forms or Survey Monkey	Small group discussions
Advantages	Immediate response	Easy to administer and tabulate	Easiest to administer and tabulate	Immediate response, more personal engagement
Disadvantages	Time-consuming and difficult to tabulate	Low return rate if sent home	May not reach all parents; requires concise questions	Difficult to tabulate, not all groups may be represented

Post-Assessment Steps

1. Review Results: Meet with the board to analyze the data.
2. Set Goals: Establish priorities based on the assessment.
3. Identify Key Programs: Focus on three to four main areas of concern.
4. Communicate Results: Share findings with members and other stakeholders.

Conclusion

Conducting a needs assessment ensures that the PTA's initiatives are well-targeted and supported by the community. This foundational step is essential for effective leadership and impactful programs.

For more information on Needs Assessments, utahpta.org/needs-assessments

STRATEGIES FOR RECRUITING AND RETAINING VOLUNTEERS



Effective Volunteer Recruitment

- ♦ **Broad Outreach:** Issue an invitation to all parents, leveraging the principal to send out appeals for volunteers at the beginning or end of the year. Include a volunteer request in registration materials, emphasizing the PTA's mission to support every child. Ensure parents are aware of the need for volunteers.
- ♦ **Personal Invitations:** Engage in direct outreach by asking friends and encouraging each board member to recruit someone they know. Host a volunteer social event to meet parents and recruit volunteers.
- ♦ **Visible Requests:** Create a poster detailing volunteer needs and display it prominently in or near the school office. Allow parents to sign up directly.
- ♦ **Positive Messaging:** Maintain a positive tone in volunteer requests. Use testimonials from current volunteers to highlight the benefits and impact of volunteering, rather than pleading for help.
- ♦ **Inclusive Utilization:** Never turn away a willing volunteer. Find ways to involve them, even if it means delegating parts of your own responsibilities. Consider starting new programs to utilize additional volunteers.
- ♦ **External Engagement:** Look beyond the school community. Reach out to local businesses, as larger corporations often offer incentives for employee volunteerism (e.g., Kohl's, Deloitte, Salesforce). High school students, particularly honor society members, may also need volunteer hours.

Volunteer Retention Strategies

- ♦ **Comprehensive Training:** Provide thorough training to ensure volunteers are well-prepared and understand their roles and expectations. Maintain organized procedure books that offer detailed information to facilitate their tasks. Link volunteering to the broader PTA mission and assign a volunteer buddy for new recruits. Utilize training resources from Council, Utah and National PTA.
- ♦ **Meaningful Tasks:** Assign tasks that are significant and contribute to the overall success of the project. Ensure each position involves diverse responsibilities and avoids wasting volunteers' time.
- ♦ **Clear Communication:** Offer clear directions and be readily available to answer questions. Value volunteers' advice and recommendations seriously.
- ♦ **Skill Development:** Help volunteers acquire new skills that can enhance their personal or professional lives. Highlight how volunteering can improve their resumes and personal abilities. Provide opportunities for leadership advancement.
- ♦ **Recognition and Appreciation:** Regularly recognize and appreciate every volunteer, regardless of their task. Make the recognition specific and meaningful to each individual. Even a small note can make a big difference.
- ♦ **Procedure Books:** Ensure each committee and board position maintains a procedure book. This provides future volunteers with a record of past activities and guidance for their roles.

By implementing these strategies, PTAs can effectively recruit and retain volunteers, ensuring a robust and engaged volunteer base.

For more information about Volunteer recruitment and retention, visit: utahpta.org/volunteers or utahpta.org/volunteering

IMPORTANCE OF TRACKING VOLUNTEER HOURS



Enhancing Credibility and Compliance

- ♦ Association Credibility: Documenting volunteer hours verifies that PTA members are actively fulfilling the association's mission and purposes.
- ♦ Tax-Exempt Status: Maintaining records of volunteer hours is essential for proving the PTA's status as a volunteer organization, which is crucial for retaining tax-exempt status.

Supporting Grant Applications and Legislative Advocacy

- ♦ Grant Applications: Accurate records of volunteer hours can strengthen grant applications by demonstrating high levels of parent engagement.
- ♦ Legislative Advocacy: Volunteer hours are used to inform legislators about the significant parental involvement in PTA activities. Annually, Utah PTA presents the governor with a check representing the monetary value of volunteer hours.

Administrative and Community Benefits

- ♦ School Administrators: Superintendents and principals benefit from knowing the extent of volunteer involvement in their schools.
- ♦ Business Partnerships: Documented volunteer hours can facilitate partnerships between schools and businesses by highlighting the level of community engagement.

Recognition and Appreciation

- ♦ Volunteer Recognition: Tracking hours allows for meaningful recognition of volunteers' contributions at various levels, from individual to state-wide.

Comprehensive Tracking

- ♦ Classroom Volunteers: Include hours recorded by the school secretary and after-school program volunteers.
- ♦ Planning and Meetings: Count hours spent in planning and attending meetings.
- ♦ Duties and Home Activities: Include hours spent on PTA-related tasks at home by all board members.
- ♦ Miscellaneous: Record hours for babysitting, driving to PTA functions, lobbying, and other related activities.

By systematically recording volunteer hours, PTAs can enhance their credibility, support grant applications, advocate effectively, and recognize the invaluable contributions of their volunteers.

Volunteer Hours are recorded three times a year on Reports 1, 2 and 3. For more information on Reports, visit utahpta.org/reports

CREATING AND MAINTAINING A PROCEDURE BOOK



Purpose and Importance

A procedure book is an invaluable tool for PTA volunteers, providing a comprehensive record of work done and essential information. It ensures continuity and efficiency by offering guidance to successive officers and chairpersons. If a procedure book does not exist for your position, now is the time to create one.

Essential Components

1. Bylaws: Include a copy of the local bylaws, which can be downloaded from the Utah PTA website.
2. Standing Rules: If applicable, include standing rules that detail job descriptions and specific procedures for conducting PTA business.
3. Annual Budget: Incorporate the annual budget, particularly the budget relevant to your activity or project.
4. PTA Calendar: Provide a calendar of PTA events for the year.
5. Workshop and Convention Materials: Include materials from relevant workshops and conventions.
6. Job Descriptions: Ensure job descriptions are updated regularly for easy reference.
7. Meeting Documentation: Include agendas, minutes, financial reports, and other relevant reports.
8. Contact Information: List the officers, chairs, and committee members along with their addresses, telephone numbers, and email addresses.
9. Resource Contacts: Provide a list of resource people and organizations, including their contact information.
10. Special Information: Include any special information related to officers or chairs and their current work plans.
11. Historical Files: Maintain previous program correspondence and files for several years to provide historical context.
12. Publicity Materials: Keep copies of all fliers, handouts, newsletter articles, announcements, and other publicity materials.
13. Receipts and Supplies: Include copies of all receipts for supplies or food purchased for your project, and a comprehensive list of supplies needed and their locations.
14. Project Timeline: Provide a detailed timeline for the project, including deadlines for reservations, orders, pickups, and meetings.
15. Project Evaluation: Conduct and document an evaluation of the project, noting what worked, what didn't, and any recommendations for future improvements. Include the names of key contributors.

Procedure Book Management

Procedure books are designed to help the PTA operate smoothly and provide each officer or chairperson with a record of past activities. Remember, the procedure book belongs to the association. Once an officer or chairperson has completed their term, the procedure book should be passed on to their successor.

By maintaining a detailed and organized procedure book, PTAs can ensure continuity, efficiency, and the successful transfer of knowledge and responsibilities from one volunteer to the next.

A good procedure book can be a simple three ring binder or an online digital folder or Dropbox or even a combination of both. Make sure whatever method you use, you update it and share with your successor.

For more information on Procedure Books or to see examples, visit: utahpta.org/procedure-books

PUBLIC RELATIONS AND YOUR PTA

What is Public Relations?

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

The public relations person (VP or chair) will work closely with the PTA President and the PTA Board in creating and implementing a successful public relations and membership campaign based on the needs assessments and goals determined by the PTA board. Some PTA units may have a communications committee depending on the size and activity of the PTA membership at the school. If a PTA has a communications committee, the public relations person would be the chairperson of that committee. For more information about a committee, visit:

The public relations person's responsibilities may include writing a monthly newsletter, updating the PTA website, drafting emails to the general membership, and helping to manage the PTA social media sites. It is essential to obtain public relations plans from each board member in charge of a specific program or event for the PTA. This would include the membership campaign, PTA-sponsored meetings, Reflections, carnivals, Red Ribbon Week, book fairs, and other PTA activities so you can keep the membership informed of these activities throughout the year.

Public relations should:

1. Let parents know how vital PTA is at their school in giving them a voice and a role in the education of their child
2. Create a spirit of parent Involvement at your school
3. Showcase your school
4. Get parents excited and involved in school events
5. Reach out to the community and better involve them at your school
6. Invite the media to promote your school
7. Use social media sources to communicate
8. Be a link with your school as an information highway into the home
9. Create an atmosphere where every parent feels like a welcome part of the school community

Responsibilities of the public relations position

Every PTA unit on every level needs a public relations vice president or chair who works intimately with the president and the executive board. As technology and communications change, it is crucial that we use all the available sources at our fingertips to reach out and touch every family that we can through the PTA mission. Our mission is a strong foundation on which we can help sustain families and strengthen the future of education for every child.

For more information about the position responsibilities of Public relations, visit: utahpta.org/responsibilities-public-relations-position



Public Relations Committees

The Public Relations Committee establishes the public relations goals for the PTA for the current school year and, in coordination with the Membership Chair, implements the membership campaign and evaluates its success.

For more information on building your committee, visit: utahpta.org/communications-or-public-relations-committee



Successful Public Relations Campaigns

Remember that for your PTA organization, building strong community relationships is key. Your PR efforts should aim to foster a sense of involvement, support, and collaboration among parents, teachers, and the broader community, ultimately benefiting the educational experience for students.

For more information about planning a successful PR Campaign, visit: utahpta.org/planning-successful-pr-campaign



Working With The Media

Be selective about the story ideas you send to your local media. If you bombard the media with media releases about stories that are not news, editors may begin to ignore all communications from your PTA. Local newspapers (online or print) can be a great way to communicate with the target audience in your community. You can informally reach out to news editors, or utilize media releases.

For strategies and tips for working with the media including a sample media release, visit utahpta.org/working-media



Social Media Communication

Creating engaging social media content and increasing engagement for your PTA is essential for fostering a strong community and achieving your organization's goals. Here are five keys to help you with this:



- ♦ **Know Your Audience:**
Understand the demographics, interests, and needs of your local PTA community. Tailor your content to address the specific concerns and interests of parents and teachers in your area. Create personas to help you visualize your target audience and their preferences.
- ♦ **Share Relevant and Timely Information:**
Keep your content fresh and relevant. Share information related to local school events, updates, important dates, and educational resources. Utilize a content calendar to plan and schedule posts in advance, ensuring you cover important topics and stay timely with your updates.
- ♦ **Visual Appeal:**
Visual content tends to perform well on social media. Incorporate eye-catching images, infographics, and videos to make your posts more engaging. Visual content can convey information quickly and encourage users to stop scrolling and pay attention.
- ♦ **Encourage Interaction:**
Foster a sense of community by encouraging comments, likes, and shares. Ask questions, conduct polls, and run contests to stimulate conversations. Respond promptly to comments and messages to show your commitment to engaging with your audience. Early engagement— likes, comments, and shares— with a post ensures more people will see your content. It is essential that board members engage with your posts early to ensure that more people will see your posts in their feeds.
- ♦ **Consistency is the Key:**
Remember that consistency is key. Regularly update your social media accounts, engage with your audience, and adapt your strategy based on analytics and feedback. By implementing these keys, you can create engaging social media content and increase engagement within your local PTA unit.

For more information, tips and tricks to using social media, visit: utahpta.org/social-media-public-relations

UTAH PTA SOCIAL MEDIA POLICY

The Purpose of Social Media is to:

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

Content

The Utah PTA Executive Committee shall approve the site and assign the responsibility for monitoring content.

Passwords must be given to three board members. Content on all social media outlets used by the PTA shall:

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

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

Notice

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

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

Solicitation, or anything that resembles solicitation, shall not be posted on this site. If complaints are received about content or if the PTA deems content to be advertising, that content will be removed regardless of whether the content is relevant to our members.

Offensive or inappropriate content will not be tolerated and will be removed and author will be banned from the site.

Posts endorsing candidate for office or any political party shall be removed immediately.

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

PROBLEM SOLVING AND CONFLICT MANAGEMENT



Effective Problem Solving

1. Empower Others: Encourage individuals to solve their own problems rather than taking on their responsibilities.
2. Address Issues at the Source: Begin problem-solving at the level where the issue occurs.
3. Use "I" Statements: Avoid assigning blame by using "I" statements to express concerns and invite collaboration.
4. Identify Specific Problems: Clearly define the problem without attributing fault.
5. Maintain Professionalism: Keep discussions focused on the issue, not personal attributes, and avoid personal comments.
6. Focus on One Issue: Address one problem at a time to ensure clarity and resolution.
7. Ensure All Voices Are Heard: Listen to all perspectives to fully understand the issue.
8. Active Listening: Provide feedback to confirm understanding and show that concerns are being heard.
9. Collaborative Solutions: Discuss potential solutions and agree on the best course of action.
10. Clarify Understanding: Ensure mutual understanding of the agreed solution through feedback and positive questions.

Managing Conflict

Common Conflict Areas

- ♦ Individual Conflicts: Personal disagreements between members.
- ♦ Activity-Related Issues: Problems arising from PTA activities.
- ♦ Policy Opposition: Disagreements with PTA policies or positions.

Conflict Avoidance Strategies

- ♦ Be Knowledgeable: Stay informed about PTA bylaws and policies.
- ♦ Follow Procedures: Adhere to established PTA procedures and guidelines.
- ♦ Stay Informed: Keep up-to-date with relevant issues and information.
- ♦ Respect Members' Rights: Be sensitive to the rights and opinions of all members.
- ♦ Avoid Personality Conflicts: Focus on issues rather than personal differences.

Key Principles

- ♦ Listen to Understand: Strive to understand different perspectives.
- ♦ Agree to Disagree: Accept differing opinions respectfully.
- ♦ Be Tolerant: Show tolerance towards varying viewpoints.

By employing these strategies, PTA leaders can effectively manage problems and conflicts, fostering a collaborative and respectful environment.

For more information on Conflict management, visit: utahpta.org/conflict-resolution-dealing-difficulties

DEALING WITH DIFFICULT PEOPLE

Identifying and Managing Difficult Personalities

Common Types of Difficult People

1. The Blocker: Consistently opposes ideas and attempts to revisit previously settled issues.
 - Strategy: Ask for their reasoning and background information to understand their perspective.
2. The Attacker: Reacts negatively and disapproves of others' contributions.
 - Strategy: Encourage a balanced discussion by asking for data and focusing on ideas rather than personalities.
3. The Clown: Disrupts meetings with jokes and non-serious behavior.
 - Strategy: Redirect focus to the topic at hand and emphasize the importance of the discussion.
4. The Recognition Seeker: Seeks attention and control over tasks.
 - Strategy: Request specific information and involve them in providing detailed input.
5. The Avoider: Withdraws from participation and avoids engagement.
 - Strategy: Directly ask for their input and emphasize the need for their contribution.
6. The Special Interest Pleader: Diverts attention to personal or specific interests.
 - Strategy: Relate their concerns to the group's goals and discuss broader implications.
7. The Dominator: Attempts to control discussions and decisions.
 - Strategy: Ensure balanced participation by inviting input from others and limiting their dominance.

Effective Management Techniques

- ♦ Stay Calm and Controlled: Maintain composure and self-control to set a positive tone.
- ♦ Encourage Participation: Foster an inclusive environment where all members feel valued and heard.
- ♦ Use Structured Questions: Guide discussions with targeted questions to keep the focus on productive dialogue.
- ♦ Promote Collaboration: Emphasize teamwork and the collective goals of the group.

By recognizing and effectively managing difficult personalities, leaders can maintain a productive and harmonious environment, ensuring that all members can contribute meaningfully to the group's objectives.

CHAIRING A CHALLENGING MEETING



Preparation Before the Meeting

1. Collaborate with Key Members: Consult with relevant officers and board members to pre-plan the meeting, ensuring maximum participation from all viewpoints. Seek assistance from your council president or region director if necessary.
2. Review PTA Positions: Check existing PTA positions on the issues to be discussed by consulting PTA sources and the Utah PTA website for resolutions or position statements.
3. Develop a Detailed Agenda: Prepare a comprehensive and thoughtful agenda to guide the meeting.
4. Study Parliamentary Procedures: Familiarize yourself with Robert's Rules of Order Newly Revised to understand meeting procedures, motions, and other relevant protocols.

Conducting the Meeting

- ♦ Have Essential Documents Ready: Ensure you have a copy of your local PTA Bylaws, standing rules, President Handbook, and Robert's Rules of Order Newly Revised on hand.
- ♦ Establish and Follow Ground Rules: Set clear ground rules for the meeting and adhere to them. Conduct the meeting with formality to maintain order.
- ♦ Agree on Special Rules if Needed: If the group consents, establish special rules for the meeting, such as limiting the number of times a person may speak on an item or setting time limits for speakers.
- ♦ Manage Speaker Recognition: As the chair, you have the discretion to prioritize speakers to ensure balanced participation, especially if someone is dominating the floor.
- ♦ Form Committees for Further Study: If disagreements persist, solicit a motion to form a committee to further study the issue. Include members with strong feelings on the topic to ensure diverse perspectives.
- ♦ Maintain Composure: Appear calm and composed, even if the situation is challenging.
- ♦ Be Polite but Assertive: Maintain politeness while being firm in managing the meeting.
- ♦ Stay Neutral and Positive: Keep a neutral stance as the chair and maintain a sense of humor to diffuse tension.

By following these guidelines, you can effectively chair a challenging meeting, ensuring that all voices are heard and that the meeting remains productive and orderly.

For more information on chairing a challenging meeting, visit: utahpta.org/chairing-challenging-meeting

SCHOOL COMMUNITY COUNCILS



Purpose and Establishment

1. The Utah State Legislature mandates the establishment of school community councils to involve parents in decision-making, improve student education, and manage School LAND Trust Program funds. Councils aim to increase public awareness of school trust lands, the State School Fund, and educational excellence.
2. Council Responsibilities
3. Annual Data Review: Assess school-wide data and develop plans for improvement.
4. Plan Development and Implementation: Assist in creating and executing:
 - Teacher and Student Success Plan (TSSP)
 - Trust LAND Plan
 - School Safety Plan
 - Safe Technology and Digital Citizenship Plan
 - Positive Behavior Plan
5. Advisory Role: Provide recommendations to school and district administrators and the school board.
6. Subcommittees: Create and manage subcommittees as needed.
7. Information Accessibility: Ensure council information is accessible to parents via the school website.

Council Composition and Elections

- ♦ Membership: Includes school employees (including the principal) and parents/guardians.
- ♦ High Schools: Minimum of six parents and four employees.
- ♦ Other Schools: Minimum of four parents and three employees.
- ♦ Elections: Members are elected by their respective groups, with terms lasting two years. The principal is an ex-officio member with full voting rights.
- ♦ Officers: Members elect a chair (must be a parent) and a vice chair (can be a parent or employee).

Meeting and Reporting Requirements

- ♦ Meeting Notices: Post meeting notices, agendas, and draft minutes on the school website one week prior to meetings.
- ♦ Reports: Provide meeting schedules, summaries of School LAND Trust Program implementation, and contact information for council members to parents.

First Meeting Agenda

- ♦ Elect officers.
- ♦ Review school data, assessments, and current plans.
- ♦ Discuss budgets and council roles.
- ♦ Calendar tasks and meetings.
- ♦ Assign tasks and create subcommittees as needed.

By adhering to these guidelines, school community councils can effectively contribute to the improvement of student education and the prudent management of School LAND Trust funds.

For more information about the role of School Community Councils, visit: utahpta.org/school-community-councils

COLLABORATION BETWEEN PTA & SCHOOL COMMUNITY COUNCILS



History of Utah PTA and Trust Lands

Utah PTA has been advocating for Utah's children for over 100 years. Thirty years ago, when the education community realized the school trust lands were under-performing, Utah PTA was at the forefront of the reform efforts, helping to ensure these assets were managed with the best interests of the public schools in mind.

Utah PTA continues to advocate for all of Utah's children, for proper management of our school trust lands, and for the distribution from the investment of land revenues to continue to make a difference in our schools through the School LAND Trust Program and School Community Councils.

Trust Lands and School Community Councils

Education and Training

- ♦ Attend Key Events: Participate in the Utah PTA Leadership Convention, PTA Day at the Capitol, and the Utah PTA Advocacy Conference to gain insights into trust lands.
- ♦ Join Online Groups: Engage with the "Utah School Community Councils" group on Facebook for updates and discussions on trust lands and school community councils.

Representation and Participation

- ♦ Ensure PTA Representation: Have a PTA board member serve on the school community council. If not elected, appoint a representative to attend meetings and participate in subcommittees.
- ♦ Collaborate on Safety and Digital Citizenship: Work with the school community council to provide education on safe technology use and digital citizenship, leveraging PTA resources.

Communication and Advocacy

- ♦ Inform the Community: Collaborate with the principal and council chair to publish articles in the PTA newsletter about the School LAND Trust program and its impact.
- ♦ Engage with Legislators: Write to state legislators and other officials to inform them about the use of trust lands funds in your school and express support for the program.

Legislative Updates

- ♦ Stay Informed: Have the Legislative Vice President and other board members join the Utah PTA Take Action Network to receive updates on trust lands and legislative issues.

By fostering collaboration between the PTA and school community councils, schools can enhance their educational programs, ensure prudent use of trust lands funds, and effectively advocate for the needs of their students and community.

For more information about School Community Councils, Utah School Trust Lands and PTA's role in protecting both, visit: utahpta.org/school-trust-lands

LOCAL PTA REPORTS: SUBMISSION GUIDELINES



Report Submission Deadlines

- ♦ Report #1: Due November 1
- ♦ Report #2: Due February 1
- ♦ Report #3: Due June 1

Submission Process

1. Access the Utah PTA Website: Visit utahpta.org and log in or create a new account.
2. Navigate to Your Account: Click on "My Account" under the "Profile" icon.
3. Verify Officer Status: Ensure you are listed as an officer for your unit under PTA units.
4. Submit Reports: Click "Reports" for your unit and follow the instructions provided at utahpta.org/Reports.
5. Editing: Reports can be edited until June 30.

Why submit reports?

By submitting all reports adhering to these guidelines and deadlines, local and council PTAs can ensure good record keeping, compliance and maintain good standing with the Utah PTA.

Report #1 Questions (Due November 1)

Membership and Hours

- ♦ Total volunteer hours from July 1 through October 31.
- ♦ Number of paid memberships.
- ♦ Number of current PTA board members, including officers, commissioners, and appointees.
- ♦ Confirmation that all board members have paid their PTA membership dues.

Budget and Finances

- ♦ Confirmation that bylaws are current.
- ♦ Approval status of the PTA budget according to bylaws.
- ♦ Budget allocation for convention/leadership training.
- ♦ Payment status of insurance.
- ♦ Remittance of state and National PTA membership dues to Utah PTA (and council dues if applicable).

Meetings and Minutes

- ♦ Status of the local PTA procedure book for the current 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.
- ♦ Use of a needs assessment to set PTA goals.

Training

- ♦ Identification of leadership training needs.
- ♦ Submission status of the following to the 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 the budget was approved
- Signed Basic Fiscal Management Procedures
- Signed Ethics/Conflict of Interest Policy
- ◆ Confirmation that two officers attended training.

Report #2 Questions (Due February 1)

Membership and Hours

- ◆ Total volunteer hours from November 1 through January 31.
- ◆ Total number of paid memberships.
- ◆ Remittance status of state and National PTA membership dues to Utah PTA.

Nominating Committee

- ◆ Election status of the nominating committee.
- ◆ Efforts to include all neighborhoods, areas, and groups in the school community.

Training

- ◆ Attendance at council or region meetings for training.
- ◆ Identification of leadership training needs.

Needs Assessment and Goals

- ◆ Top priorities based on the needs assessment.
- ◆ Programs implemented to achieve these goals.
- ◆ Assistance needed from the Council President or Region Director.
- ◆ Arrangements for sending out a needs assessment (parent survey) for the upcoming school year.

Report #3 Questions (Due June 1)

Incoming Officers

- ◆ Submission of the incoming president's name, phone number, and email.
- ◆ Entry of PTA officers into Givebacks.

Membership and Hours

- ◆ Number of paid memberships for the current year.
- ◆ Total volunteer hours from February 1 through June 30, including estimated hours for the remainder of June.
- ◆ Completion status of the needs assessment for the upcoming school year.

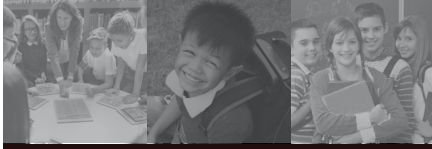
Training

- ◆ Attendance at council or region meetings for training.
- ◆ Check off Attendance of incoming PTA positions at the Utah PTA Leadership Convention training in May:

Budget and Finances

- ◆ Remittance status of state and National PTA membership dues to Utah PTA (and council dues if applicable).
- ◆ Arrangement status for the Annual Financial Reconciliation (AFR) to be completed by August 1.
- ◆ Identification of the required IRS filing for the PTA (990N or Form 990EZ).

RESOURCES

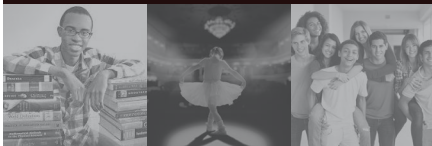


**Utah
PTA®**

everychild. one voice.

MISSION

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



PTA Idea Bank

Need Membership Fliers or a PTA Sticker or the Mission Bookmark? Find these resources and other ideas at: utahpta.org/ideas



To submit your own media to the Idea Bank, submit a picture, Canva template link and short summary of item to: <https://docs.google.com/forms/d/e/1FAIpQLSddibxqovv8cOKWPay7ELSRtrdSYUNPUR8reiXfg068a8MJyA/viewform?usp=preview>



PTA University

Looking for more training and support from a variety of sources? Check out Utah PTA University where you will find recorded trainings, Podcasts, upcoming Practical PTA Trainings, as well as National PTA training opportunities. Check out these great resources: utahpta.org/university



Practical PTA

Join Utah PTA for a monthly webinar training series on topics to help you be successful in your PTA position. utahpta.org/practical



Pulse Podcast

Weekly podcast that covers a wide range of topics designed to empower and engage PTA leaders and parents in general. Hear from PTA Leaders, Community Partners and Experts as they share insights on everything from educational equity to fostering a positive school climate and everything in between. Listen to learn today! Find on your favorite podcast platform today!

National PTA Thrive e-learning courses

Build leadership skills through engaging and short online courses. pta.org/home/run-your-pta/elearning





PRESIDENT HANDBOOK MEMBERSHIP

INTRODUCTION TO MEMBERSHIP



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

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

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

and year-round attention from leaders like you.

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

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

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

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

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

GUIDELINES FOR A MEMBERSHIP CHAIR

Membership is a year-round activity. Continually invite individuals to join and become involved. One more membership represents one more parent involved in a child's life. The membership chair is responsible for facilitating the work of the membership committee and ensuring timely, accurate communication with other PTA committees and officers. The membership chair and committee should develop a membership growth plan that will direct the activities of the committee. This plan will create membership recruitment and retention strategies that will lead to overall membership growth. Attracting new members, and retaining current ones, is among the most important duties of a PTA. A strong membership is essential for PTA to be a force in decisions involving the welfare and education of children.



For a complete Job Description of a Membership Chair, visit: utahpta.org/membership-guidelines



For a Timeline of Membership Activities, visit: utahpta.org/membership-calendar-timeline-ideas



Need campaign Theme Ideas? Visit: utahpta.org/membership-campaign-ideas or find our theme boards on Pinterest



PTSA/Student Membership Ideas: utahpta.org/membership-ideas-ptsa



How to Pay State and National PTA Dues: utahpta.org/how-pay-state-national-dues



Learn about different Membership Awards that will help you grow your PTA/PTSA: utahpta.org/membership-awards



There are many benefits to PTA members that more than make the membership pay for itself. Learn about the many PTA membership Benefits here: utahpta.org/membership-benefits

THE VALUE OF PTA MEMBERSHIP

For over 125 years, National PTA has worked to better the lives of every child in America. When you belong to PTA, you are part of a network of millions of parents, teachers, administrators, business leaders and policymakers who work together to ensure our public schools provide a quality education for every child in a safe and healthy environment.

PTA Members ...

- ♦ Strengthen family and community engagement in schools.
- ♦ Elevate the voices of families in critical child advocacy work.
- ♦ Support programs that improve student outcomes and success.



Community

PTA provides a network of support for families during the busy, fast-paced school year. There are hundreds of opportunities for parents, teachers, administrators, business leaders and political leaders to build the relationships that help our communities thrive.



Advocacy

For over 125 years, National PTA has been the conscience of the country for child and youth-related issues. PTA members advocate every day for federal, state and local policy initiatives that better the lives of every child in education, health and safety.



Programs

PTA provides research-based, high-quality programs that encourage families to explore everything from the arts and STEM, to healthy lifestyles and school improvement initiatives. They're innovative, easy to implement, and even better—they're fun!



Funding

Your membership in PTA gives you access to hundreds of grants to help you better engage families, support student success, improve the health and safety of students and families, increase access to arts education or celebrate advocacy and diversity.



Leadership Development

PTA provides leadership development and support to prepare leaders to run and grow their PTA. Our new online learning community, Thrive, offers short courses you can take from anywhere. PTA also provides mission-based training on family engagement and diversity, equity and inclusion.



Resources

PTA brings you the latest parenting advice, membership recruitment tools, programs, leadership development and advocacy training to help PTA members stay on the leading-edge and give more to our nation's children.

WHY MEMBERS JOIN

Parents

- ♦ To be involved in a child's education
- ♦ Parent Engagement training
- ♦ Parenting skills
- ♦ Understand school policies
- ♦ Networking/technology
- ♦ Friendship/socializing
- ♦ Leadership skills
- ♦ To have a voice
- ♦ To partner with school administration, staff
- ♦ To be part of the solution
- ♦ To understand the school system
- ♦ Interaction with other parents
- ♦ Opportunity to share their culture and a positive community experience
- ♦ To support the school

Students

- ♦ Friendship/socializing
- ♦ Citizenship
- ♦ Scholarships
- ♦ Community service
- ♦ Sharing issues

Teacher/School Staff/School Board

- ♦ A voice on issues
- ♦ Support parents
- ♦ Support students
- ♦ Share common issues
- ♦ Networking

Why Parents are not joining PTA

- ♦ No Explicit Ask to Join: That's right - potential members said a top barrier to joining PTA was simply that they were never ASKED to join, but they were frequently asked to support PTA fundraisers.
- ♦ Do not Understand the Value of PTA: Current members had difficulty explaining the role of PTA and how it supports education and curriculum needs, serves as an important advocate for children, or how it builds school community. They often see PTA as a social club and did not understand the role of PTA, the community it builds between the school and families or see how their dues or fundraising activities directly impacted their child.
- ♦ Confusion About What PTA Membership Means: Our research found that people were not even sure if they were members! Specifically, they felt that PTA membership is confusing, inconsistent and not universally understood - and most often interpreted it as time consuming with volunteering and attending meetings being requirements of membership.
- ♦ Not Welcoming to All Families: Parents would like to see a more diverse PTA membership base, representative of our growing multicultural communities to reflect inclusive and welcoming school community.
- ♦ Everyone is Interested, Once They Understand the Role of PTA: The research also uncovered that particular audiences - including multicultural families, younger parents and fathers - are especially interested in PTA's impact and getting involved in their child's education.

How to change the tide and get new members:

You know the good work that your PTA does for your community every day—but talking about your accomplishments and inviting others to join you can be hard. Trying to start a Conversation with someone about how awesome PTA and how they would be a great addition.

There's no one-size fits all way to talk about the value your PTA/PTSA brings, but here are a few key tips.

- ♦ Always make an explicit Ask to Join
- ♦ Clarify what PTA membership means and that it is different from volunteering
- ♦ Remember that everyone belongs in PTA, and that everyone is interested, once they understand the association's value and role

FIND YOUR PTA WHY AND SHARE IT



We have found that the most successful membership recruitment and retention conversations answer the following questions:

- ♦ Why join PTA/PTSA?
- ♦ In what ways does PTA help me?
- ♦ How do those ways benefit me and my child?

The answers fall in one of three identified areas:

- ♦ PTA/PTSA creates connections
- ♦ PTA/PTSA support your child
- ♦ Our PTA/PTSA amplifies your voice

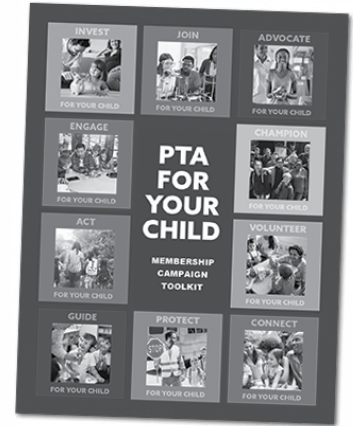
Here is a sample of Why I PTA membership pitch from the "You Belong" Toolkit:

- ♦ You should join our PTA because your membership can help you build a village to support your child and connect you locally and to a nationwide network that supports all children.
- ♦ When you belong to our PTA, you'll connect to important school and community resources.
- ♦ Being a member of our PTA will help you access resources both inside and outside the school building, like mental health resources from the Healthy Minds Program, or parenting news and tips from the Notes from the Backpack podcast. Will you support our efforts by becoming a member?

Learn how to Create a PTA/PTSA Value Message with the "You Belong" Toolkit: pta.org/home/run-your-pta/membership-resources/reasons-you-belong

10 TIPS FOR LAUNCHING A SUCCESSFUL MEMBERSHIP CAMPAIGN

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



The "For Your Child" PTA membership campaign has great tools and ideas to support your membership goals



PTA MEMBERSHIP ADVANTAGES



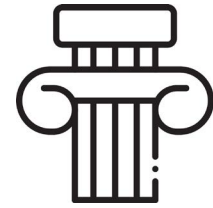
LOCAL

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



STATE

1. Operating dues from local PTAs set at **\$2.75** per member to support Utah PTA functions, resources, programs, and activities.
2. State-wide leadership training: child advocacy; local, council and region leadership, Leadership Convention, website: utahpta.org, etc.
3. Advocacy: a united voice for all children at state legislative and executive levels of government. Take Action Network, Advocacy Conference, oversight of school trust lands, PTA Day at the Capitol, etc.
4. State-sponsored programs that enrich the lives, talents, and interests of students: Reflections, Battle of the Bands, Hope for Tomorrow, Red Ribbon Week, Teen Healthy Relationship Month, etc.
5. State and national award recognition opportunities: outstanding volunteers, educators, administrators, PTA members, etc.
6. Scholarships for students; grants to locals to assist in arts education.
7. Representation at National PTA Conventions concerning Utah PTA members' concerns and issues.
8. Representation on boards and committees with cooperating partners and agencies for children.



NATIONAL

1. Operating dues from local PTAs are set at **\$3.25** per member to support National PTA functions, resources, programs, and activities.
2. Advocacy: a united voice for all children at national legislative and executive levels of government.
3. Nation-wide training sessions and workshops for local and state leaders and members.
4. National resources for all PTA leaders, members, and parents.
5. National member-to-member network for information and input on child advocacy issues.
6. Member benefits: discounts on goods and services from member benefit providers.
7. E-Newsletters: Weekend Update, Leadership Briefing, Advocacy Insider, and *Our Children* magazine.
8. Website PTA.org: parent resources, e-learning courses, webinars, etc.
9. National programs: Reflections, School of Excellence, STEM & Family Grants, Take Your Family to School Week.
10. National PTA Awards: [Current grants and awards](#)

THE VALUE OF UTAH PTA

Where Does My \$2.75 Go?

Leadership Training

- ♦ Utah PTA website - utahpta.org
- ♦ Utah PTA Leadership Convention
- ♦ Utah PTA handbook for local PTA boards
- ♦ Training handbooks for leaders
- ♦ Field service for local PTAs
- ♦ Council support
- ♦ Financial training and oversight
- ♦ National Standards for Family-School Partnerships
- ♦ Student Leadership Conference
- ♦ Social media
- ♦ Commissioner Resources

Advocacy Efforts

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

PTA Programs

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

Awards & Grants

- ♦ Utah PTA Awards
 - ♦ Arts and Education Fund Grants
 - ♦ [Membership Awards](#)
 - ♦ Gold Start Unit Awards
 - ♦ L.E.A.P. Awards
-

THE VALUE OF NATIONAL PTA

Where does my \$3.25 Go?

Running Your PTA	Advocacy	Family Resources	Events	Programs
PTA.org	Take Action	Parents' Guide to Student Success	Event calendar	National PTA School of Excellence
National Standards for Family-School Partnerships	Federal legislation	Family guides	Annual Convention and Expo	Reflections
One Voice blog	PTA Positions	College and career readiness	Legislative Conference	STEM + families
eLearning	Legislative Conference	Our Children magazine	Safer Internet Day	Family reading experience
Local PTA Leader Kit	Advocacy resources	Health Resources	State Conventions and Leadership Training	Connect for Respect
PTA Membership Campaign	Advocacy awards	Safety Resources	Teacher Appreciation Week	Healthy lifestyles
Diversity and Inclusivity Toolkit		Special Education Toolkit	Take Your Family to School Week	Award and grant opportunities
PTA branding and web guidelines		Notes from the Backpack podcast	Every Child in Focus	The Smart Talk
Spanish resources		Summer Learning	Back to School with PTA	PTA Connected
Marketplace				
e-Newsletters				



PRESIDENT HANDBOOK
NOMINATIONS AND ELECTIONS

NOMINATION & ELECTION OVERVIEW

The nomination and election process for PTA officers is crucial to ensure that qualified individuals are selected to lead. Here are the key guidelines:

1. Ongoing Process:
 - Consider nominations and elections as an ongoing process. Members should be prepared to participate as they work together and learn about individuals' strengths and leadership skills.
2. Nominating Committee:
 - The PTA uses a Nominating Committee to ensure:
 - » The qualifications of each nominee are considered.
 - » The consent of each nominee to serve is obtained.
 - » There is at least one qualified nominee for each office.
 - » The nominee is favored by more than one person.
3. Role of the Nominating Committee:
 - The committee seeks out and nominates the best-qualified eligible person for each office. It is a responsible, sensitive, and deliberative body.
 - No one automatically serves on the committee by virtue of their position in the PTA or school.
 - The PTA president or president-elect cannot serve on the committee. The president orients the committee to its duties and then leaves the meeting.
4. Election of the Nominating Committee:
 - The general membership elects the Nominating Committee at a general membership meeting prior to December 31.
 - The committee should reflect the diversity of the PTA community.
 - Members must be current PTA members in good standing and are elected based on merit, ability, integrity, and discretion.
5. Committee Meetings:
 - The committee elects its own chair and meets to consider nominees.
 - All discussions and decisions are confidential and should only occur during official meetings.
 - The committee evaluates each candidate equally and by the same standards.
6. Nominee Selection:
 - The committee elects a nominee for each office through a ballot process, requiring a majority vote.
 - The committee contacts each nominee to obtain their consent to serve if elected.
7. Communication of Nominations:
 - The list of nominees is communicated to the general membership at least 14 days before the election meeting.
 - Additional nominations can be made from the floor at the general membership meeting for nominations.
8. General Membership Meeting for Elections:
 - Elections are held prior to March 31.
 - Only current PTA members in good standing can vote.
 - If there is more than one nominee for an office, the election is by ballot. If there is only one nominee, the election can be by voice vote.
9. Election Committee:
 - If there are multiple nominees for any office, an Election Committee (tellers) is formed to conduct the election.
 - The tellers prepare ballots, verify membership, and count votes.
10. Post-Election:
 - The ballots may be destroyed or filed for a designated length of time.
 - If an office remains unfilled, it is considered a vacant office to be filled by a majority vote of the incoming officers.

By following these guidelines, the PTA ensures a fair and transparent nomination and election process, leading to the selection of capable and committed leaders.

NOMINATION & ELECTION GUIDELINES

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

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

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

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

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

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

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

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

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

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

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

THE NOMINATING COMMITTEE

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

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

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

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

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

Members of your Nominating Committee:

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

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

ELECTING YOUR NOMINATING COMMITTEE

Your bylaws designate that a nominating committee is elected prior to December 31 at a general membership meeting. During that meeting, immediately before your Nominating Committee is elected, your PTA president or secretary reads aloud your bylaws section pertaining to the committee (VI:5).

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

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

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

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

EXAMPLE OF NOMINATING COMMITTEE ELECTION MEETING

- ♦ The general members of the nominating committee are nominated by PTA members; a person may nominate themselves.
- ♦ The president may ask, "Are there any nominations for members of the nominating committee?"
- ♦ Any PTA member may submit a name, the person must consent to serve on the committee, but does not need to be present to be elected.
- ♦ After all nominations are made, the president closes nominations and calls for a vote.
- ♦ The same process is used to elect alternates.
- ♦ If there are more nominees than positions available, a ballot vote should be taken.

NOMINATING COMMITTEE CHAIR

The Nominating Committee Chair Shall:

1. Retain all envelopes/emails with suggested candidates or letters of intent unopened until the first committee meeting.
2. Make every effort to hold meetings when all members can attend. Ask the principal if you could be in contact with them during your consideration of the Teacher Vice President nominee.
3. Provide copies of your bylaws and your standing rules/job descriptions for each committee member. Also, be sure a membership roster is available to committee members at your meetings.
4. After the committee has met and voted, contact elected nominees (with the committee members present), inform them of specific responsibilities of the office, and obtain their consent to serve if elected.
5. Advise nominees to attend the general membership meetings at which their names shall be placed in nomination, elections will be held, and, if elected, they will be installed.
6. Advise committee members of the results of the contacts if calls have to be made after the meeting.
7. Assist the committee in compiling its report, which includes the name of the nominee for each office and which is signed by the committee members.
8. As soon as possible, notify those who submitted letters of intent or were suggested as nominees but did not receive the nomination.
9. Present the committee report to the Executive Committee as soon as a nominee has accepted for each office and prior to the committee's report at the general membership meeting held at least 14 days prior to the election meeting (VI:5k).
10. Assure that the list of nominees is distributed to all members of your PTA after the nominations meeting.
11. Reconvene the committee in the event a nominee withdraws before the election is held and there is no other nominee for that office.

BEFORE THE FIRST NOMINATING COMMITTEE MEETING

The members of the committee shall review the information in these guidelines, the general election information and qualifications for and duties of all offices to be filled as listed in your bylaws (VII), and the job descriptions in your standing rules.

No discussion about nominees or committee business shall take place between committee members before the first meeting of the committee.

No one else should ever talk with members of the committee or anyone else about committee business.

All suggestions for candidates are given to the committee chair, in writing, in a sealed envelope or via email before the committee's first meeting.

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

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

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

1. The committee may send out an interest survey to your PTA members asking for member interest in serving in an office and should ask current board members to submit written suggestions for candidates.
2. Recommendations of candidates may be submitted in writing in a sealed envelope or an email to the nominating committee chairman by any member of your PTA prior to the first meeting of the committee. The consent of the person is not necessary to suggest his name to the committee. These are suggestions only—they are not mandatory and are confidential.
3. If current officers who have served only one term want to be considered for re-election, they must submit a letter of intent stating that interest, in writing in a sealed envelope or an email, to the Nominating Committee chair prior to the first meeting of the committee. The committee is not obligated to nominate an incumbent to serve a second term and shall do so only if it is in the best interest of your PTA.

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

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

THE NOMINATING COMMITTEE MEETING

Electing the Nominee for Each Office

The well-being of your PTA shall be the top priority of the Nominating Committee. The committee must put the good of your PTA above personal preferences. The major responsibility of the committee is to nominate the best qualified eligible person for each office to be filled.

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

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

Consideration of candidates should be an orderly process.

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

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

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

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

1. If both the PTA president and president-elect have served only one term and could serve another term, one option would be that both the PTA president and president-elect could be nominated to serve another term in their same office.
2. A second option would be that the committee would vote to re-nominate either your PTA president or president-elect and elect a new nominee for the other office.
3. A third option would be to have a different person nominated to both offices. The decision would be reached by determining what is in the best interest of your PTA.

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

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

1. It is important to consult with the principal after a preliminary discussion about possible teacher candidates and before electing a teacher to be the Teacher Vice President nominee, in order to be certain that there would be no conflicts with other responsibilities. The nominee for Teacher Vice President should in turn be elected as a nominee by the committee.

2. Both the principal and Teacher Vice President nominees are introduced with the slate of nominees at your general membership meeting for nominations.

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

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

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

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

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

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

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

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

Contacting Nominees

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

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

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

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

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

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

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

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

Please submit to the Nominating Committee Chair

Job descriptions are available in the President Handbook.

Name of Suggested Nominee _____

Address _____

City _____ State _____ Zip code _____

Home Phone _____ Daytime Phone _____

This person would like to be nominated for the office or positions of director, commissioner, or representative _____ of the _____ PTA/PTSA
(position) (name of the PTA/PTSA)

Current PTA/PTSA Position _____

PTA/PTSA Experience: _____

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

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

Leadership experience: _____

Qualifications for this position:

Current PTA/PTSA Member for at least 7 days

Must include a current biography and picture with the application

Consent from nominee has been obtained: _____

(Signature of person submitting this recommendation)

(Phone)

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

President: _____

President-elect: _____

Treasurer: _____

Secretary: _____

Legislative Vice President: _____

Membership Vice President: _____

These nominees' names will be posted for 14 days, starting (give dates). The election will take place on

_____ at _____ in the _____ School. If anyone would like to run for
(date) (time) (location)

any of the elected positions, they will need to submit their name to this _____
(school)

PTA/PTSA secretary _____
(secretary name and email)

by _____
(date) (time)

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

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

Names of Nominating Committee members:

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

COMMUNICATION OF NOMINATIONS TO THE GENERAL MEMBERSHIP

Communication must be given to your general membership at least 14 days before your election meeting to give ample time for members to consider the nominees (VI:5j). This notification can be given in person or virtually, but must be communicated to all of the membership of your PTA.

Announcing the nominations:

The chair of the nominating committee reports the list of nominees to the executive committee prior to reporting to the general membership. (VI:5k)

1. Your PTA president conducts all business of your PTA, including the nominations.
2. The list of nominees is communicated to the general membership, via the PTA Secretary using whatever method your PTA uses to communicate with all of the membership. It is not possible to over communicate.
3. The announcement shall include:
 - A. The list of nominees as presented by the nominating committee.
 - B. The process for "running from the floor of the election meeting" as specified in local bylaws Article VI, Section 6.
 - 1) Additional nominations must be filed with the PTA Secretary at least five (5) days prior to the election meeting
 - 2) These names will then be placed in nomination at the election meeting. When nominations have been offered for all offices, nominations may be closed by a motion and a two-thirds vote, or by your PTA president. It is usually best to allow your PTA president to close nominations when no one wishes to make additional ones. This closes the nominations by unanimous consent.
 - 3) All nominees must be members of the local PTA for at least seven (7) days prior to the election meeting..
 - 4) No additional nominations may be made at the election meeting. The list of all nominees is recorded in the minutes of your nominations meeting.
4. Your PTA president announces the date of the election meeting and that the only nominations allowed from the floor at the election meeting will be those who file a letter of intent to be a nominee with your PTA secretary at least five days before your election meeting (VI:6).
5. That only members of your PTA shall be able to vote at the election meeting..

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

After your nominations meeting, your committee chair ensures that all of your PTA members receive notification of the list of nominees and the date of your election meeting. This is done in the manner you normally communicate with your members (ie newsletter, email, webpage, etc.)

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

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

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

GENERAL MEMBERSHIP MEETING FOR ELECTIONS

Electing officers is one of the most important duties of the members of your PTA. Officers should be elected for their abilities and their willingness to serve your PTA. Your bylaws designate that elections are held prior to March 31.

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

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

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

Your bylaws designate the minimum number of your PTA members who must be present to constitute a quorum (X:2).

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

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

During your general membership meeting for elections:

1. Your PTA president conducts all business of your PTA, including the elections.
2. Before the election business begins, your PTA president or secretary reads aloud the portion of your bylaws pertaining to elections (VI:1-4).
3. Your PTA president states again the list of nominees from the nominations meeting and then asks your secretary if any letters of intent to be nominated were received at least five days before your election meeting.
4. If your secretary received none, your PTA president declares nominations closed. (Proceed to step 6.)
5. If your secretary received any letter(s) of nomination, the secretary so reports.
 - A. This (These) nominee(s) name(s) must then be placed in nomination from the floor.
 - B. This (These) nomination(s) does (do) not require a second.
 - C. Only the names of the (those) person(s) who filed a letter of intent to be nominated with your PTA secretary at least five days before the meeting may be placed in nomination during your election meeting. Your PTA president does not ask for any additional nominations at the meeting.
6. When there is only one nominee for an office, the election for that office may be by voice vote if there is a motion adopted to do so (VI:4c).
 - A. For election to an office when there is only one nominee, your PTA president says, "Our bylaws state that when there is only one nominee for an office, the ballot may be dispensed with and the election held by voice vote. Is there a motion for a voice vote for the office of —?"
 - B. A member of your PTA is then recognized by your PTA president and says, "I move that election for the office of — be held by voice vote." Your president then asks for a second to the motion. After the second is received, your president says, "All in favor of holding the election for the office of — by voice vote say 'Aye'. Those opposed say 'No'." A majority vote is needed.
 - C. If the motion fails to receive a majority vote, the vote must be by ballot.

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

Virtual Election Meeting

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

THE ELECTION COMMITTEE

“Tellers” or “Election Judges”

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

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

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

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

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

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

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

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

1. Each nominee may designate a person as an observer while the ballots are counted.
2. The tellers begin by counting all the ballots.
 - A. If the number of ballots exceeds the number of ballots issued, the tellers return to the assembly for instruction or re-voting.
 - B. A number of ballots less than the number of ballots issued is ignored.
3. In counting the votes cast, one teller reads the ballot while another records the vote next to the name of the nominee.
4. The other teller(s) carefully observes the reading and recording.
5. Blank ballots are ignored.
6. Illegal votes are counted to determine the number of votes cast but are not applied as a vote for or against any nominee. Illegal votes may include:
 - A. Two ballots folded together (they are recorded as one illegal vote).
 - B. A ballot that is unintelligible.
 - C. A vote for an ineligible nominee, who is anyone not on the ballot since all nominees must have already been presented in the nominations meeting or have filed with the secretary at least five days prior to the election meeting.

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

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

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

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

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

The tellers' report should contain:

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

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

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

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

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

EXAMPLE OF A TELLERS' REPORT

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

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

Chair: _____

AFTER THE GENERAL MEMBERSHIP MEETING FOR ELECTIONS

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

If an office other than president-elect remains unfilled after the election, it shall be considered a vacant office to be filled by a person elected by a majority vote of your incoming officers, all officers having been notified of the election. (VI:7a) A vacancy in the office of president-elect is always filled by the vote of the general membership of your PTA at a special election meeting called by your PTA president, all members of your PTA having been notified.

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

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

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



PRESIDENT HANDBOOK BYLAWS

PTA/PTSA BYLAWS INFORMATION



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

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

- ♦ Approving your AFR and annual budget at your first meeting (prior to September 30), also called the annual meeting)
- ♦ Electing your Nominating Committee (prior to December 31)
- ♦ Electing your new officers (prior to March 31)

Dues—Dues should not be considered a fundraising endeavor and should be an amount low enough to encourage individuals to join, but high enough to cover state and national dues with some operating money left for administration of your local PTA. Funds to sustain the programs of your PTA may be raised in other ways.

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

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

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

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

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

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

present and voting, your approved minutes are then submitted to Utah PTA. The minutes must show the minimum quorum requirements were met and the result of the vote, whether in person or virtual.

If your officers or general membership decides an amendment(s) needs to be made to your bylaws, follow the instructions in the step above, vote on the amendment(s), and then reaffirm your bylaws at the same general membership meeting. Amendments require a two-thirds approval of the quorum. Only information in blanks may be amended.

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

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

UTAH PTA BYLAWS INFORMATION

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

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

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

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

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

SUBMITTING A PROPOSED PTA BYLAWS AMENDMENT FOR UTAH PTA BYLAWS

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

Due October 1 in the Utah PTA office.

Region _____ Council Name _____

Local PTA Name _____ President's Name _____

President's Address _____

President's Phone _____ Email _____

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

Article _____ Section _____ Now reads: _____

Article _____ Section _____ Proposed to read: _____

Reason for this proposed amendment: _____

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

GUIDELINES FOR LOCAL PTA/PTSA STANDING RULES



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

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

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

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

Standing rules are a supplement to the bylaws. They do not contain parliamentary procedure but are adopted and amended according to the following parliamentary procedures: A standing rule(s) may be (a) adopted, as a main motion, at any general membership meeting by a majority vote with previous notice having been given; (b) suspended for the duration of any meeting (but not longer) by a majority vote; (c) amended or rescinded by a two-thirds vote at a general meeting. If notice of the proposed action is given at a previous meeting or in the call for the meeting, a standing rule may be amended or rescinded by a majority vote.

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

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

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

General Suggestions

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

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

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

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

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

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

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

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

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

BASIC PRINCIPLES

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

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

Non-commercial Principle (and Unrelated PTA Business Activities)

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

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

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

Non-sectarian Principle

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

Non-partisan Principle

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

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

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

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

INFORMATION FOR RENEWING, AMENDING, AND SUBMITTING PTA BYLAWS



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

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

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

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

- ♦ About 60 days before your bylaws expire, your executive committee reads your current bylaws word for word to determine if any amendments need to be proposed.
- ♦ If your executive committee determines no amendments need to be proposed, fill in the blanks of the online form **exactly** as they are in your last approved bylaws:

Under Article IX: General Membership Meetings, Section 2, the number of PTA/PTSA members present at a general membership meeting to conduct business (quorum) must be at least 10, as specified in your bylaws; however, the number should be a fair representation of your membership.

- ♦ About 45 days before your bylaws expire, announce to your membership that your bylaws need to be renewed and will be posted at a specified location at the school and/or online for all members to read and, if desired, make suggestions to your president for amendments to them.
 - ▶ If your executive committee or general membership determines that your bylaws need to be amended, see Article XVI in your bylaws and fill in the Amended Information at UtahPTA.org/Bylaws and print an updated and amended copy to post at the school, online, and/or in a newsletter with the amendment(s) noted. **Note:** Local amendments can only be made to the bylaws where there are "blanks" to be filled in. (See page 115)
- ♦ Wait at least 14 days after the bylaws are posted.
- ♦ If it is still determined that no amendments need to be proposed, at your next general membership meeting your president asks for a motion and second to the motion to reaffirm your bylaws on the current form as it has been posted. If they are reaffirmed by a majority vote of the general membership present and voting, the bylaws are reaffirmed and the approved meeting minutes will be submitted to Utah PTA so the bylaws can be approved.

Procedure For AMENDING Your Bylaws

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

with the amendment(s) and the new bylaws. The minutes should be titled as a general membership meeting, reflect the quorum and the votes cast and whether they were in person or virtual votes.

Submitting Your Bylaws And/Or Amendments

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

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

GLOSSARY OF PTA TERMS

Amend (Amendment)—To change the wording of the bylaws or a motion by inserting and/or striking out.

Annual Financial Reconciliation (AFR)—An at-least annual official examination, verification, and report of the financial accounts and records of the treasurer. The Annual Financial Reconciliation (AFR) report is presented to the general membership for adoption at the first general membership meeting of the school year.

Annual Meeting—The last general membership meeting of the school year, at which annual reports are received and other business designated in the bylaws is conducted.

Annual Report—A resume of your annual PTA activities, programs/projects and finances prepared by the president (or a designated representative).

Area Director—A member of the Utah PTA Board of Directors

Audit—see annual financial reconciliation.

Ballot—The list of nominees on which a person marks his vote.

Basic Principles—Established procedures of National PTA, as stated in the bylaws, which summarize the principles of conduct all PTA groups, for their protection, are required to follow in carrying out the purposes and work of PTA.

Board—The group of members (officers, commissioners, and appointees) authorized to act for your PTA between its meetings, with specified limitations delineated in the bylaws.

Budget—A plan of operations based on an annual, itemized estimate of expected income, expenses, and disbursements approved by your general membership prior to October 1.

Business—Important matters to be brought before your PTA for action.

Bylaws—A document adopted by vote of your PTA members, which contains the basic rules for governing and orderly conduct of business under which your PTA operates.

Chair—The presiding officer, who serves as a means through which your PTA expresses its will. Authority is vested in the office, not the person. Because he acts for the group, not for himself, he must be impartial. He refers to himself as “the Chair,” avoiding the use of the pronoun “I.”

Charter—A document issued by Utah PTA authorizing a PTA/PTSA to function as a local PTA of National PTA and Utah PTA.

Commission—A specific group led by a commissioner which develops and implements programs and projects within related areas of concern.

Commissioner—A Utah PTA Board member who chairs a commission responsible for specific areas of concern; directs implementation of programs, projects, and legislative action; and represents Utah PTA to other organizations as directed by the president.

Committee—A group elected or appointed to consider, investigate, perform a service or function, or act upon a particular area of concern.

Constituent Association—In a national association such as National PTA, local and state associations are constituent associations of the parent body, National PTA, as provided for in the National PTA Bylaws.

Convention—The annual Utah PTA event during which time elections are held, bylaws amendments and proposed resolutions are voted on, awards are presented, workshops are offered, and connections are encouraged through networking with members and exhibitors.

Council—A group of at least three local PTAs/PTSAs organized under the authority of the Utah PTA for the purpose of conference, leadership training, and coordination of efforts.

Disbursement—The paying out of funds.

Executive Committee—The elected officers of your PTA/PTSA to whom power and authority are delegated between meetings of the board as prescribed in the bylaws.

Ex Officio—By virtue or because of office. When provided in the bylaws, certain offices automatically confer membership on certain committees. That officer may attend committee meetings and has all the privileges of membership, including making motions, debating, and voting. He is counted in the quorum if he has the right to vote and another person may not take his place in the ex officio role.

Field Service—Training provided by Utah PTA, which should be requested by the region director at least 30 days in advance.

General Membership Meeting—A regular meeting of your PTA which includes your PTA membership, the general public, and invited guests.

Installation—A meeting or ceremony at which PTA officers are inducted (not sworn in) into office.

Interim Meetings—Monthly meetings between Utah legislative sessions of legislative study committees, which study and discuss issues and at which citizen input is encouraged.

Local Unit—A local Parent-Teacher (PTA) or Parent-Teacher-Student (PTSA) Association.

Majority Vote—One more than half of the votes cast.

Meeting—A single official gathering of members.

Member—A person who has joined your PTA/PTSA and thus is automatically a member of both National PTA and Utah PTA and has all the rights of membership, provided he continues to meet the membership requirements as stated in your bylaws.

Minutes—The official record of all business and proceedings transacted in a meeting.

National Constituent Association Advisory Council—The body composed of presidents of each state constituent association. The Council's responsibilities include assisting the board in setting the strategic direction of National PTA and participating in leadership development.

National PTA—National Congress of Parents and Teachers, Inc., composed of all the Parent Teacher Associations of the 50 states, the District of Columbia, and the European, Pacific,

Virgin Islands, and Puerto Rico Congresses.

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

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

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

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

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

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

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

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

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

Purposes—The Purposes of National PTA and Utah PTA are generally thought of as the reasons National PTA and Utah PTA exist.

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

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

Region Support Committee Chair—A member of the Utah PTA Board of Managers.

Meeting—A meeting held as prescribed in the bylaws.

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

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

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

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

Standing Rules—Written rules and procedures adopted by a

majority vote of your general membership which further define your bylaws, may not conflict with your bylaws, and relate the details of administration and activity of your PTA.

Two-Thirds Vote—Two-thirds of the legal votes cast, which is necessary for any proposal that deprives a member of his rights in any way.

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

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

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



PRESIDENT HANDBOOK
FINANCIAL

FIDUCIARY RESPONSIBILITIES GUIDE

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

fi-du-ci-ar-y

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

Fiduciary Duties

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

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

Duty of Care

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

1. Attendance

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

2. Delegation vs. Abdication

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

3. Information Flow.

The essence of the duty of care is the duty to be informed. Courts will not tolerate directors who are not sufficiently informed about the activities of their association. On the other hand, courts will not generally second-guess decisions of boards based on thorough research and business judgment.

- A. Directors must assure themselves that information and reporting systems exist in the association that are reasonably designed to provide to senior management and to the board itself timely, accurate information, sufficient to allow management and the board to reach an informed judgment.
- B. A board's decision not only must be informed, but also must be reasoned and deliberate.
 - Decisions should be made by the board deliberately and without haste or pressure.
 - The board should be as thoroughly and completely prepared in its decision-making process as possible. Materials concerning decisions should be sent out for review in advance; and the board should read and understand those materials.

- The board members should be actively involved in deliberation in the board meeting. Written materials should be read, digested, and commented on by board members.
- Written records of board preparation and deliberation should be maintained.
- In the case of any major transaction, the board should receive the basic documents and analysis by experts in connection with the transaction.
- Independent evaluations and appraisals, as necessary, should be prepared by experts and presented to the board.

Duty of Loyalty

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

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

Duty of Obedience

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

Financial Controls

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

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

Safeguarding Assets

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

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

INFORMATION PROVIDED BY: Paula Cozzi Goedert, Barnes & Thornburg LLP, Chicago, Illinois Paula.G Goedert@BTLaw.com

FINANCIAL TIME LINE

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

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

July 1	Fiscal year begins/change over PTA checking account signers , Givebacks ownership, and other financial platform ownership	
By the 25th	Membership dues (remit monthly)	National and state portions submit to Utah PTA via ACH through Givebacks or mailed with a check and remittance form
August 1	End-of-Year Documents (previous fiscal year) - Year-End Financial Statement	Local and Council PTAs submit via Givebacks
	Annual Financial Reconciliation report (AFR)	Local and Council PTAs submit via Givebacks
	E-filed/Accepted IRS Form 990	Local and Council PTAs submit via Givebacks
	Sales Tax Refund Request	Local and Council PTAs submit via utahpta.org/treasurer
August 15	Council review of Local Unit End-of-Year Documents	Council approve or reject uploaded documents in Givebacks.
	Council review of Local PTA Sales Tax Refund Requests	Council accept or cancel request via utahpta.org
September 1	Region review of Council End-of-Year Documents	Region approve or reject uploaded documents in Givebacks.
	Region review of Council PTA Sales Tax Refund Requests	Region accept or cancel request via utahpta.org
September 25	Membership dues - early bird remittance deadline	
October 1	Beginning-of-Year Documents - Budget	Local and Council PTAs submit via Givebacks
	Budget approval minutes	Local and Council PTAs submit via Givebacks
	Signed Ethics Conflict of Interest Form	Local and Council PTAs submit via Givebacks
	Signed Basic Fiscal Management Form	Local and Council PTAs submit via Givebacks
	Proof of insurance	Local and Council PTAs submit via Givebacks
	PTA board list (current year)	Local and Council PTAs submit via Givebacks

FINANCIAL TIME LINE

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

FINANCIAL FAQs

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

What is a PTA in Good Standing?

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

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

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

Is Our Local PTA Tax Exempt?

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

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

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

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

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

What is a “Form W-9”?

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

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

What are the Requirements for Acknowledging Donors or Sponsors?

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

What Tax Filings Must a PTA Do?

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

How Do We Go About Creating a Budget?

Budgets

- ♦ Help each board member determine what funds will be necessary to meet the goals you set together based on your needs assessment.
- ♦ Be realistic—use budgets and actual expenditures from previous years as a guideline.
- ♦ A copy of your budget and the minutes of the meeting where the budget was approved must be submitted through Givebacks or to your council president/region director by October 1.
- ♦ Include funds for leadership training (conferences and Utah PTA conventions). Training is an important and long-lasting use of PTA funds. It will benefit your school for years to come, as well as your local board and your general membership. It is definitely a legitimate PTA expense.

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

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

The treasurer is the chair of the Budget Committee. The president is a member of the Budget Committee, as are other elected officers or general members as either elected or appointed by the president. The Budget Committee will develop a budget and then propose it to the entire Executive Committee for their approval. Once the proposed budget is approved by the Executive Committee, it must be approved by a majority vote of a quorum of the membership at the first general membership meeting of the year. This could be at a Back-to-School night or at a board meeting where the general membership has also been invited. A copy of the approved budget and the minutes of the general membership meeting where it was approved must be submitted through Givebacks or council/region treasurer by October 1.

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

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

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

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

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

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

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

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

What is a Year-End Financial Statement?

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

FUNDRAISING GUIDELINES

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

FINANCIAL FORMS

Financial forms can be found in the Treasurer Handbook, the Membership Handbook, or online at: utahpta.org/treasurer

- | | |
|------------------------------|---|
| ♦ Check Request form | ♦ Sample Local Donation Request Letter |
| ♦ Funds Received form | ♦ Sample Local Thank You Letter |
| ♦ Cash Box Instructions | ♦ Financial Time Line |
| ♦ Beginning Cash Box Balance | ♦ State and National Dues Remittance form |
| ♦ Money Counting Sheet | ♦ Council Dues Remittance form |
| ♦ Bank Reconciliation form | ♦ Sales Tax Refund Request instructions |
| ♦ Monthly Treasurers Report | ♦ Sales Tax Refund Request |
| ♦ In-Kind Donation form | ♦ Year-End Financial Statement |

UTAH PTA BASIC FISCAL MANAGEMENT PROCEDURES

PTA Funds

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

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

Do you have these basic controls in place?

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

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

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

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

Other officers or members may be required to occasionally handle PTA money (for example, dues from membership enrollment or revenue from a fundraising project). In these cases, great care should be taken in counting and recording funds received in accordance with established procedures. Money thus collected

should be turned over to the treasurer without delay, and the treasurer should bank that money immediately. PTA money should never be stored in the school or in the homes of PTA officers or members. If large sums are handled by the treasurer, it is advisable to bond him or her as a protection both to the treasurer and to the PTA.

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

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

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

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

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

Guidelines to Follow When Money Has Been Mismanaged or Embezzled

1. When mismanagement or embezzlement of funds is suspected, the PTA line of communication should be followed in informing and receiving direction and assistance. The local PTA should contact the council. The council in turn will contact the region, and the region will make contact with the Utah PTA Treasurer. If for some reason assistance cannot be obtained through the line of communication, contact the Utah PTA Treasurer directly.
2. When any wrongdoing is suspected, the person involved should have a meeting with the local Executive Committee and make an explanation of what has happened. If the meeting is unsatisfactory for either party, the decision may be appealed up the line of communication. If the issue involves a president or president-elect, council/region leadership must facilitate the meeting. Once wrongdoing is suspected, meetings should take place in a timely manner. If an outside investigation is warranted, authorities may become involved.
3. The PTA officers have a responsibility to the membership for all PTA monies. The PTA also has the responsibility to be a professional organization. The PTA officers are highly encouraged to try to protect the person's reputation by using discretion in what is said and done, especially in the preliminary stages of an investigation. It is not responsible, however, to disregard the incident.
4. If the results of the meeting warrant further action, the Executive Committee should request that an AFR be done, if appropriate, and documentation gathered. They should also carefully consider whether it might be appropriate to file a police report and/or to close the bank account. If an outside investigation is warranted, the police will become involved.
5. Theft of money is breaking the law and should be handled as a serious offense. Embezzlement is the same as ordinary theft. The charges are criminal and, if deemed appropriate, are filed at the police department. Depending on the amount it could be a misdemeanor up to a felony.
6. According to the local PTA bylaws (Article VI, Section 7b), a person who fails to perform the duties of his office should be removed from office. It is the responsibility of the local Executive Committee to meet and declare the office or position vacant. All resignations must be made in writing to the president. The local Executive Committee is to elect a replacement to fill any vacancy, except the president or president-elect (local PTA Bylaws Article VI, Section 7a).

PTA BASIC FISCAL MANAGEMENT PROCEDURES: Signature Page

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

Region	Council		
Local PTA/PTSA			
Position	Print Name	Signature	Date
President			
Treasurer			

ALL OTHER ELECTED PTA OFFICERS' SIGNATURES

Position	Print Name	Signature	Date
Membership Chair			
Fundraising Chair 1			
Fundraising Chair 2			

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

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

PTA ETHICS/CONFLICT OF INTEREST POLICY

Information

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

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

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

students, PTA/PTSA board meetings and/or conventions, nor while transporting themselves or others to any PTA/PTSA sponsored activity or event.

7. PTA does not recognize co-elected positions. Refer to PTA/PTSA bylaws information in the Utah PTA President Handbook (refer to officer's section bylaws)

Guidelines to follow when there has been mismanagement or a conflict of interest

1. When mismanagement and/or conflict of interest is suspected, the following PTA lines of communication of informing, receiving direction and assistance should be followed: The local PTA should contact the council. The council in turn should contact the region, and the region will contact Utah PTA. If for some reason assistance cannot be obtained through this line of communication, contact Utah PTA directly.
2. When any wrongdoing is suspected those involved should have a meeting with the local Executive Committee with notification given to the council/region representative. If the outcome of the meeting is unsatisfactory for either party, the decision may be appealed up the lines of communication. If the issue involves a president or president-elect, council/region leadership must facilitate the meeting. Once wrongdoing is suspected, a meeting should take place in a timely manner. If an outside investigation is warranted, authorities may become involved.
3. The PTA officers and/or board members have a responsibility to the membership and to act in a professional manner. Refer to local PTA bylaws (Article VI, Section 1), "The officers of this PTA/PTSA shall abide by, promote, and represent the Purposes, Mission, bylaws, policies, and procedures of PTA." The PTA officers and/or board members should protect the person's reputation by using discretion in what is said and done, especially in the preliminary stages of an investigation. However, it is not acceptable to disregard the incident.
4. Refer to local PTA bylaws (Article VI):
 - 7b "If an officer or appointee fails... to perform the duties of his office the members of the Executive Committee shall meet and declare the office or position vacant."
 - 8a. "All resignations must be made in writing to the president." If the office of president is declared vacant, the letter of resignation must be made to the council/region/Utah PTA.
 - 8b. A vacancy occurring in the office of president shall be filled for the remainder of the unexpired term by the president-elect, who shall then cease to be president-elect. A vacancy occurring in the office of president-elect shall be filled by a vote of the general membership at a special election meeting called by the president, all members having been notified.
 - 8c. A vacancy occurring in any other office shall be filled for the remainder of the unexpired term by a person elected by a majority vote of the remaining members of the Executive Committee, all members of the committee having been notified."
5. When necessary, the council president and/or Utah PTA may declare the office or position vacant.

PTA ETHICS/CONFLICT OF INTEREST POLICY

Signature Page

Fiscal Year: 20__ - 20__

Region	Council
Local PTA/PTSA	
President	

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

Position	Print Name	Signature	Date

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

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

REPORT OF TRAININGS ATTENDED

Due October 1

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

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

TRAINING OPPORTUNITIES INCLUDE:

Utah PTA Leadership Convention | National PTA Convention | Council training

utahpta.org/university/archive | pta.org/home/run-your-pta/elearning

Year 20____ to 20____	PTA Unit ID (8 digits)
Region	Council
Local PTA/PTSA	
Two training sessions required per year. Others are optional.	

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



PRESIDENT HANDBOOK
LEGISLATIVE

THE PRESIDENT'S ROLE AS A PTA ADVOCATE



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

According to National PTA, "PTA advocacy means supporting and speaking up for students in schools, in communities, and before governing bodies and other decision-makers of policies or practices affecting students." Use this plan from National PTA to get started. The concepts are further discussed in the Advocacy 101 video on PTA University.

Get Organized and Make a Plan

Step 1: *Identify a Legislative/Advocacy Vice President.*

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

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

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

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

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

Step 4: *Learn from PTA's History.*

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

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

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

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

Reward: For notifications when PTA members are needed to take action on significant state legislation or policy alerts join the Utah PTA Take Action Network through this [link](#). [Voter voice](#).

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



Join the Utah PTA commissioners and learn about the critical issues facing Utah's children at the annual Utah PTA Advocacy Conference in the fall. Let your legislators know that Utah PTA is paying attention and taking action by attending Utah PTA Day at the Capitol during the legislative session. See utahpta.org for exact dates, under the Events tab.

Step 8. Join the Utah PTA Advocacy Facebook Group.

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

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

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

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

All Utah PTA members are invited to join LAC. This committee meets once per month during the school year and weekly during the legislative session. This committee discusses and recommends the positions Utah PTA should take on legislation and other policy issues. For more information about LAC or other statewide advocacy efforts, visit utahpta.org/legislative-advocacy-committee-lac.

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



Is there an area where you feel that Utah PTA should be advocating for children? Check to see if there is a resolution in place and if not, then submit a resolution on that topic. See [Utah PTA's current resolutions](#).

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

UTAH PTA PUBLIC POLICY PROGRAM



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

The Utah PTA Purposes

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

The Utah PTA Public Policy Program has five components:

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

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

National PTA Mission

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

National PTA values

COLLABORATION: We will work in partnership with a wide array of individuals and organizations to

broaden and enhance our ability to serve and advocate for all children and families.

COMMITMENT: We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.

DIVERSITY: We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

RESPECT: We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.

ACCOUNTABILITY: All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

Utah PTA Mission statement

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

Vision of Utah PTA:

To fulfill the Mission, Utah PTA will:

Advocate by speaking on behalf of all children and youth in schools, in the community, before governmental bodies, and before other organizations that make decision affecting children.

Develop programs, resources, and leadership skills that enhance the lives of all children, youth, and their families.

Engage the public in united and equitable efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.

2. The National PTA and Utah PTA Resolutions

Resolutions and positions are formal statements of PTA

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

The process for moving forward a Utah PTA resolution is:

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

Utah PTA resolutions and position statements are found on the Utah PTA website:
utahpta.org/resolutions

3. The Utah PTA Legislative Policy

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

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

General Principles for Consideration of Proposed Legislation:

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

that each child is unique with individual needs and talents.

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

4. Utah PTA Legislative Priorities

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

Utah PTA Legislative Priorities are approved by Utah PTA members annually during the Advocacy Conference Business meeting. Refer to the [Public Policy Program](#) for the current year legislative priorities.

5. The Utah and National PTA Position Statements

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

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

PROTECTING THE UTAH PTA 501C(3) STATUS



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

Remain Non-partisan

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

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

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

nonprofitvote.org/what-nonprofits-can-say-about-local-elections/

No Use of Public Emails

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

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

[LE.Utah.gov/XCode/Title20A/Chapter11/C20A-11-P12_1800010118000101.pdf](https://leg.utah.gov/XCode/Title20A/Chapter11/C20A-11-P12_1800010118000101.pdf)

Part 12

Political Activities of Public Entities Act

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

(1) Except as provided in Subsection (5), a person may not send an email using the email of a public entity:

- (a) for a political purpose;
- (b) to advocate for or against a proposed initiative, initiative, proposed referendum, or referendum; or
- (c) to solicit a campaign contribution.

Lobbying rules for non profit organizations



MEET THE CANDIDATES OR MEET YOUR ELECTED OFFICIALS NIGHT



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

To Organize the Event:

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

ELECTED OFFICIALS AND LEGISLATION INFORMATION

Local Elected Officials Information

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

Representative(s) _____

Email Address(es) _____

Phone Number(s) _____

Senator(s) _____

Email Address(es) _____

Phone Number(s) _____

For more information see [Who Represents You](http://utahpta.org) on utahpta.org

Legislative Advocacy Committee (LAC)

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

Utah PTA Take Action Network

The Utah PTA Take Action Network is an email list which members are encouraged to join. This list is not given out to anyone but is used to keep our members informed of the activities of our legislature and how they can become involved. The Network is activated as alerts and calls to action are needed during the session. [Join the Utah PTA Take Action Legislative Network](#).

Utah PTA Legislative Bill Sheets

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

School Community Councils/School Board Meetings

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

NATIONAL PTA LEGISLATIVE PROGRAM

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

The National PTA Legislative Program has four components:

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

NATIONAL PTA LEGISLATIVE PROCEDURES

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

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

PRACTICAL PARLIAMENTARY GUIDE



A simple table of the most frequently used motions

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

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



PRESIDENT HANDBOOK
PROGRAMS AND AWARDS

NATIONAL PTA BENEFITS

National PTA provides many programs and resources for local PTA units. Programs and resources are supported and made available through Utah PTA commissions and committees.

National PTA Resources

At National PTA, [our mission](#) is to make every child's potential a reality, so we are invested in your child's success.

We're parents too, so we know just how critical you are to your child's future. That's why we wanted to share our [toolbox](#) to help you navigate all of the academic, social and emotional milestones your child will experience.

These resources were created for you—the parent who's always on the go, but still looking for a community that offers the best info to help your child excel at school and in life.

For a list of National PTA Resources for your PTA and for families, visit: utahpta.org/npta-resources



National PTA Programs

[National PTA Programs](#) provide a wide array of accessible, engaging and educational events that inspire, recognize and impact all students and their families. These FREE or low-cost programs are designed in best practice for effective family engagement to support the physical, social-emotional and learning needs of students while having fun!

For a list of National PTA Programs available to your PTA and Community, visit: utahpta.org/national-programs



NEW! "Where You Are" Programs

National PTA offers In-Person and At-Home [Programs \(Spanish\)](#) and [Program Models \(Spanish\)](#) to meet students and families where they are. Partnering with caregivers and schools, National PTA programs are designed to support the physical, social-emotional and learning needs of students while having fun!

To learn more about the New "Where You Are" Programs, visit: pta.org/home/programs add QR Code

Does your PTA want to host an engaging and empowering family night that supports academic success or promotes digital wellness? National PTA offers great options for PTAs to host families nights to bring their communities together. These programs offer complete outlines of how to run a fun and simple family night right out of the box. There are also grant opportunities associated with many of these each fall that will give you the funds to host one of these engaging events.

Family Reading Experience - pta.org/home/programs/family-reading

PTA Connected - pta.org/home/programs/connected

National PTA's STEM Initiative - pta.org/home/programs/stem

Healthy Lifestyles - pta.org/home/programs/Healthy-Lifestyles



UTAH PTA BENEFITS

Utah PTA also provides many programs and resources for local PTA units. Programs and resources are supported and made available through Utah PTA commissions and committees.

Why does PTA use committees and commissions to accomplish their work?

A PTA utilizes commissions and committees to effectively manage and delegate tasks across a diverse range of activities, allowing for focused work on specific areas. Commissions and committees help your PTA get things done!

- ♦ **Division of labor:** By forming committees, the PTA can distribute responsibilities across smaller groups, enabling efficient work on various projects simultaneously.
- ♦ **Specialized expertise:** Committees can be formed with individuals having specific skills or knowledge relevant to their focus area, leading to better decision-making and execution.
- ♦ **Increased engagement:** Committees provide opportunities for more parents and teachers to actively participate in the PTA beyond just attending general meetings.
- ♦ **Improved decision-making:** Smaller committee groups can facilitate open discussions and thorough consideration of options before presenting recommendations to the larger PTA board.

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

- ♦ **Commissions:** At a local level, a commission is over several committees/programs/events, like an umbrella, with a specific issue or concern in mind.
 - Examples: Community Engagement, Education, Family Life, Health and Safety
- ♦ **Committees:** At a local level, a committee is tasked with 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 leadership, membership, newsletter, and social media
- ♦ **Programs:** A PTA program is a program which the membership deems important to your school community through a needs assessment.
 - Examples: Grad night, spelling bee, Reflections, Battle of the Bands, School of Excellence, fundraisers, spirit nights/family nights
- ♦ **Events:** The place and time at which a PTA program happens. Usually a PTA program that is a one time thing.
 - Examples: Guest speakers at PTA meetings, family nights, art walks, carnivals, field day



For more information on how to organize a commission, committee, program or event, see president's tool section of this handbook or utahpta.org/organizing-your-board

UTAH PTA COMMISSIONS

At the state level, Utah PTA commissions consist of Community Engagement, Education, Family Life, Health and Safety and are chaired by a Commissioner who also sits on the Utah PTA Board of Directors. Utah PTA commissioners along with community partners are there to provide program ideas and resources for specific areas of concern for local commissioners. Information on each commission can be found at utahpta.org under Resources.

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

As always, a needs assessment can help your PTA determine what the community needs are. Here are some areas that the Utah PTA commissions focus on.

Community Engagement

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



For a list of Community Engagement Commission areas of focus, visit: utahpta.org/community-engagement

Education Commission

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



For a list of Education Commission areas of focus, visit: utahpta.org/areas-focus-education-commission

Family Life

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



For a list of Family Life Commission areas of focus, visit: utahpta.org/family-life

Health

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



For a list of Health Commission areas of focus, visit: utahpta.org/health

Safety



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

For a list of Safety Commission areas of focus, visit: utahpta.org/safety

To join a Utah PTA Commission or to get more information, please contact the Advocacy VP or visit: utahpta.org/needs-you



UTAH PTA COMMITTEES

Utah PTA committees are organized groups that plan, promote, and carry out the activities, programs and events of Utah PTA. These Committees expand the opportunities for meaningful contribution and build a leadership pipeline by including more volunteers from all levels of PTA. Well structured committees dramatically increase Utah PTA's capacity to accomplish its mission while providing program ideas and resources for specific areas of concern for local commissioners. Information on each of the Utah PTA Committees can be found at utahpta.org under the tabs of: Resources, Programs and Events.

As always, a needs assessment can help your PTA determine what the community needs are. There are many great options to help your PTA build community and support student learning and academics while making friends and growing.

The following are a list of Utah PTA committees. Local PTA members are always welcome to join committees. To learn more about our committees, please visit their pages on utahpta.org. You can also sign up for committees at: utahpta.org/needs-you

Director Committees

- ♦ Communications
- ♦ Leadership
- ♦ Membership

Advocacy Related Committees

- ♦ Legislative Advocacy Committee
- ♦ Advocacy Resolutions Support Committee
- ♦ Digital Wellness Committee
- ♦ Special Needs Committee
- ♦ Trustlands Committee

General Working Committees

- ♦ History
- ♦ Technology
- ♦ Givebacks
- ♦ Leadership Academy
- ♦ Student Leadership

Programs Committee

The Utah PTA Program Committee is a new committee designed to help spotlight special events and programs of Utah PTA. Each of the following events are under the Program Committee and work in tandem together to ensure each event run perfectly. Some of these committees will also have sub-committees and accompanying meetings to accomplish their goals each year.

- ♦ Arts Grant
- ♦ Awards
- ♦ Battle of the Bands
- ♦ Diversity, Inclusion and Outreach (DEI)
- ♦ Grants
- ♦ Military Families
- ♦ Reflections
- ♦ School of Excellence

PROGRAMS AND RESOURCES CREATED BY PTA FOR PTA

While there are many programs that PTAs can use, the following programs have been created by National PTA and Utah PTA. They have been designed to help PTAs build their community and provide support to parents and families for specific issues they are facing.

National PTA School of Excellence

National PTA School of Excellence recognition program opens the lines of communication and critical thinking within school communities to make data-driven decisions that yield positive, long-term results.

National PTA School of Excellence is a recognition program that supports and celebrates partnerships between PTAs and schools to enrich the educational experience and overall well-being for all students. By enrolling in this program, your PTA and school administrators are making a year-long commitment in identifying and implementing an action plan for school improvement based on [PTA's National Standards for Family-School Partnerships](#) and [Transformative Family Engagement](#).

Those that exhibit improvement are honored as National PTA Schools of Excellence, a distinction that spans two years. Honorees receive celebration tools and automatic consideration for the Phoebe [Apperson Hearst Award](#) and a \$2,000 grant for their school. PTAs are encouraged to renew their designation each year, or every other year, to continue to build on their momentum.

Your School of Excellence designation will help attract new, action-oriented PTA members who want to focus on the issues that affect our children the most. And being a National PTA School of Excellence will open the door to other honors and opportunities for your school.

Enrollment is open June 1 to October 1 each school year. To find more information and to enroll, visit: [PTA.org/Home/Programs/National-PTA-School-of-Excellence](https://pta.org/Home/Programs/National-PTA-School-of-Excellence)



National PTA Take Your Family To School Week

Occurs during a designated week each February

PTA [Take Your Family to School Week](#) is a way to attract families to your school. Invite family members to step away from their daily grind and into the school during PTA Take Your Family to School Week. This special week is designed to connect families with their child's school experience, and hosting PTA Take Your Family to School Week events will help strengthen the parent-school partnerships throughout the year.

By planning organized activities for families at the school:

- ♦ Parents gain a new perspective on their children's school day.
- ♦ Teachers build positive partnerships with parents.
- ♦ Children know that their family cares and values education.
- ♦ Schools build an excellent reputation in the community as an open welcoming place for families.
- ♦ Studies show that a child's academic performance increases when their parents become involved in their education.

Ideas for PTA Take Your Family to School Week:

- ♦ Open Gym Day: Get In The Game! Set up for volleyball, softball, kickball, or basketball on the school grounds.
- ♦ Family Food Functions:
 - Host mealtime opportunities with options like "Guests and Goodies" or "Parents and Pastries."
 - Evening meals: ethnic pot luck, barbecue, or indoor picnic where families bring food.



- ♦ Wall of Fame: Who's Who at the School
 - Students interview teachers and adults at the school. They can use quotes, photos, pictures, and facts for a "Wall of Fame."
 - School Lunch Together.
 - Parents go through the lunch line with their student and eat lunch together. Family Heritage Exhibit:
 - Families contribute artifacts that highlight the history and diversity of all the members of the school's community.

Utah PTA Battle of the Bands



Battle of the Bands (BOB) is an official Utah PTA program for PTSAs.

Utah PTA's Battle of the Bands is the only PTA program like it in the country. Beginning in 2002, a competition between high school bands was created. In its current form, there are three levels of competition.

School Playoffs

One band representing each school will move on to the multi-region competition. Each school that has more than one band applying to compete will hold a school competition. This will be run by the school PTSA president or BOB Chair. All school winner applications will be forwarded by the school PTSA president or BOB Chair to the region director or chair in charge of their multi-region competition by March 1.

Multi-Region Competition

Multi-region competitions will take place between March 1-31. The region director or chair will be in touch with all school winners with the date, time, and place of the multi-region competition. Three bands from each multi-region competition will advance to the state BOB. Each multi-region will decide which three bands will advance, some send first and second place and then the audience favorite, and some send the top three place bands. The multi-region competition winner's application will be sent on to the Utah PTA Student Leadership Commissioner by the region director or chair. Multi-region entries due to Utah PTA by April 1.

State Competition

The state Battle of the Bands will include the three entries from each multi-region competition and may have other entrants through areas that may not have a multi-region, or there are other possible wild card entries. State BOB has traditionally been held around the end of April or beginning of May.

Rules are updated each year, so for a complete packet with rules and forms go to our website: replace with this link: utahpta.org/bob

Utah PTA Digital Wellness Video contest



The purpose of this video contest is to promote digital citizenship, safety and wellness through students' creativity, tech and filming skills.

Students Eligible to Enter

This video contest is open for students in grades 9-12 in the state of Utah at a PTA/PTSA school. Students may create a video as a group, but only one student can submit the video entry. If a group entry wins, the winning student will share the prize with the other students in the group.

Digital Wellness Video Topic

A new theme is picked each year and announced in the early fall. Students may choose to focus on one or more aspects of the theme. For example, a student may choose to focus on how to be safe online and another student may choose how to be responsible with their use tech use, but students do not need to cover all three aspects. However, a student is welcome to cover each aspect if they would like. The theme is generally broad and open for different interpretations as there are many different aspects of being safe, kind and responsible online. Be creative and have fun.

For more information on this year's theme and contest rules, visit: utahpta.org/video-contest

Utah PTA Family Health Night Toolkit



utahpta.org/family-health-night

As a Health Commission we believe in whole-child wellness that will help to make every child's potential a reality! Use the power of collaboration with school district health professionals and community partners to bring resources and fun to your school community. In the toolkit you will find

Planning Materials, Printables, Digital Fliers and examples of Brochures you can use.

Utah PTA November Military Family Month

Concert and Essay Contest

Attention All PTA Families

Utah PTA and Utah National Guard Celebrate [Military Family Month](#) With a Concert Held Around Veterans Day Every Year.



Essay Contest

Utah PTA, in partnership with Utah National Guard, is also holding an essay contest for military families! The three winning students from elementary school, middle school/junior high, and high school from military families will be honored at this concert and receive a valuable prize!

A military family is one that has father, mother, sister, or brother who has served or is presently serving in the Active, Reserve, or National Guard (Army, Navy, Air Force, Marine Corps, and Coast Guard). If children live with guardians who are presently serving, they are also included.

The theme for the essay contest is "Why I Am Proud of My Veteran!" The essay must be no more than 500 words. You can email or send the essay to Utah PTA Military Family Specialist at militaryfamilies@utahpta.org. Word format is preferred. Deadlines for the essay and concert information will be posted on utahpta.org in the early fall.

Utah PTA Red Ribbon Week



Red Ribbon Week is generally held the last full week in October.

In many schools, PTAs plan the Red Ribbon Week activities. Utah PTA in collaboration with prevention experts created a Red Ribbon Week Toolkit.

This toolkit is meant to be a helpful guide when planning Red Ribbon Week activities. Included in this kit are ways that adults can engage students in effective drug prevention messaging and activities that are based on prevention science and research. The categories and themes are meant to be guides in assisting adults to develop activities during Red Ribbon Week that will target their individual communities, schools, and students as needed. Activities are separated out by ages (elementary, secondary, or both) and include instructions, templates, and resources needed for implementation. Feel free to adjust activities and themes as needed.

To access the Red Ribbon Week Toolkit, visit: utahpta.org/brand-new-red-ribbon-week-toolkit

Utah PTA Suicide Prevention Toolkit



In a time when suicide is the leading cause of death among Utah youth, it is more important than ever for families, educators, and community members to be educated about suicide and suicide prevention. This evidence-based toolkit has been created by prevention specialists in collaboration with Utah PTA with a singular goal in mind: to help every child in Utah. It contains a combination of upstream, midstream, and downstream approaches designed to help children of all ages in their homes, at PTA activities, in the classroom, and more.

It is our hope that each PTA/PTSA will have a prevention specialist who can help implement these ideas throughout the year into things you are already doing, adding a prevention piece to as many activities as possible in order to keep the conversation going.

The activities suggested in the "School Support" section align with the Utah State Board of Education Core Standards for health and are designed to be used by educators and others in the classroom.

Activities are separated by ages (elementary, secondary, or both) and include instructions, templates, and resources needed for implementation. Feel free to adjust activities as needed.

To access the Toolkit, visit: utahpta.org/Suicide-Prevention-Toolkit

UTAH REFLECTIONS ONLINE GUIDE



Complete training materials are available at utahpta.org/ref.

Note to PTA presidents: Reflections is now 100% online and easier than ever to run. Open communication between local schools, councils, and regions is essential to keep the program running smoothly.

Schools must be in good standing by December 1 of each year or their entries will be excluded from participating in Reflections at the state level. Please make sure that your membership dues are paid and that your bylaws are current or renewed. Bylaws take time to renew because you are required to post them for 30 days - Change to 14 days.

Please provide your Reflections Specialists with contact information for your council/region specialists, including names, phone numbers, and email addresses. You also need to share contact information for your specialists with your council/region specialists at the earliest possible date so they will not miss out on trainings and deadline information. Sharing and using contact information between the levels is essential. Also, please provide your specialists with the information needed to register with National PTA, which includes your unit ID number and bylaws expiration date.

Getting Started

1. Become an Admin for Your School in Utah Reflections Online.
 - A. Reflections is run through Utah Reflections Online. To manage your school, you will need to designate at least one person to be your school's admin.
 - B. Admin access should be set up by the level above you, but can also be set by the previous admin(s) for your school. If you are having trouble finding out who your admin is for the next level, please email reflections@utahpta.org and include your school name.
 - C. When you are set as an admin, if you did not already have a Utah PTA account, you will receive an email instructing you to create a password. You will then have access to log into Utah Reflections Online at utahpta.org/ref. If you already had an account, you will not receive an email. Individuals who have registered for convention, online training, or other Utah PTA programs or who have judged Reflections likely already have Utah PTA accounts.

- D. Once you log into the system, click on the red Reflections Admin tab. You may now manage your unit, entries, and judging. Before you launch your program, delete any admins who are no longer involved in Reflections. To do this, click on the admins tab. You will then see all the admins listed for your school.
 - E. To remove an admin, click the red "Remove" button to the right of the name.
 - F. Trainings for Utah Reflections Online can be found at utahpta.org/ref.
2. Register Your PTA for Reflections
- A. Register with National PTA at PTA.org/reflections. All schools, councils, and regions must register by November 1. This is not the same thing as being assigned as an admin for Utah Reflections Online. Registering helps National PTA collect data to monitor and improve the program.
 - B. Click on "Register with National PTA."
 - C. You will need your school name, address, eight-digit PTA ID number, contact person, email, and phone number. For the contact person and phone number, please put the Reflections Specialist's information and not the school's.
 - D. You will see a confirmation screen, but will not receive a confirmation email.
* Registering with National PTA will not make you an admin for your school. They are two separate processes.
3. Organize and Plan
- A. Many hands make light work. Recruit others to be on your Reflections Committee. Back-to-school night is a great time to put out a sign up sheet.
 - B. Join the Utah PTA Reflections Facebook Group. This valuable resource will connect you with Reflections Specialists from all levels of the program.
 - C. Find judges. Remember judges should not be from your school and should have some knowledge of the category they will be judging.
 - D. Dates to remember: When are entries due to local schools? When are entries due to council? When are entries due to region? At the local level, you get to choose your own deadline. Find out now when the deadline is for the next level and set yours about a month before that date. This will give you ample time for checking entries, judging, scoring and recognition.
 - E. Every school is required to use Utah Reflections Online found at utahpta.org/ref.
 - F. Consider creating a dedicated Reflections email for your school and assigning that email as an admin. This way your school will always have online access and will only need to change the name and phone number associated with the account when a new specialist takes over the program.
 - G. Entries cannot be uploaded for your school without an admin being assigned. Any admin can add new admins for their level or below. Multiple admins are allowed.

The complete Local Leader's Guide, rules, training videos, and everything else Reflections can be found at utahpta.org/ref.

UTAH PTA AWARDS



Recognition is key to the retention of volunteers and a staple of every successful organization. Here at Utah PTA, we are eager to support your efforts to award the contributors who go above and beyond throughout your school community. We refer you to our website: utahpta.org/awards, for everything you need to successfully carry out an awards and recognition program in your PTA.

Utah PTA is here to help assist you and your school in providing opportunities to recognize greatness at your school. While there are endless ways this can be done, we are happy to provide you with this meaningful opportunity.

Utah PTA Recognition Awards

Award	Description
<i>Utah PTA Advocacy Award</i>	This award is given to a local PTA or individual for excellence in their efforts to support and speak on behalf of children and youth.
<i>Utah PTA Development Award</i>	This award is given to a local PTA for excellence in program and/or leadership development. This award is encouraged for programs in schools that are in the first five years of their program – developing and improving the program. Remember, this is for a program not an individual.
<i>Utah PTA Engagement Award</i>	This award is given to a local PTA for excellence in the area of engagement. This can include engaging the community, businesses, faculty, parents, etc. Remember, this is for a program not an individual.
<i>Utah PTA Outstanding Elementary Educator</i>	This award recognizes a professional educator currently working with students in grades preschool to 5th or 6th Grade (depending if 6th Grade is in your elementary or secondary school). State winners will be selected based on their relationship with students, parents, PTA, and the community.
<i>Utah PTA Outstanding Secondary Educator</i>	This award recognizes a professional educator currently working with students in grades 5th or 6th grade (depending if 6th grade is in your elementary or secondary school) to 12th Grade. State winners will be selected based on their relationship with students, parents, PTA, and the community.
<i>Utah PTA Outstanding School Administrator Award</i>	To recognize an outstanding school administrator currently working with students on an elementary or secondary level. This can include assistant principals.
<i>Utah PTA Outstanding Support Staff</i>	This award recognizes any school support staff (custodians, secretaries, lunchroom staff, bus drivers, aides, etc.) currently working in schools in grades preschool to 12th grade. State winners will be selected based on their relationship with students, parents, PTA, and the community.
<i>Utah PTA Outstanding Volunteer Award</i>	This award is given to a volunteer who renders volunteer service to children through the education system and is making a positive difference. Nominees will be considered on the basis of quality of volunteer commitment.
<i>Utah PTA Spirit of Inclusivity</i>	This award recognizes an outstanding PTA/ individual who has organized an inclusivity event/ activity using the PTA National Standards for Family School Partnerships. Examples: Welcoming families into the school community; communicating effectively; supporting student success; speaking up for every child; sharing power and collaborating with community; involving minority parents in PTA. If an individual, they must be a member of the PTA and exemplify the PTA Purpose and Mission.
<i>Utah PTA Spirit of PTA Award</i>	This award recognizes an outstanding volunteer who has given consistent and outstanding service through PTA. This person must be a member of the PTA and exemplify the PTA Purposes and Mission.

Local**Council****Region**

Each school can submit one award per category to Council

Council approves and advances all qualifying awards to region

Region Advances qualifying awards to state, with judging if necessary

Awards should be completed online by January 31

Awards should be evaluated and advanced to region by February 15

Awards need to be judged and advanced to state by March 1

Utah PTA Membership Awards



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

PTAs may apply for as many awards as they would like. Many awards have similar criteria. Award applications can be found on the Utah PTA website <https://utahpta.org/membership-awards>.

To be eligible for any of the following awards, membership dues must be paid/submitted to Utah PTA by the due date. Winners may be promoted on social media.

Award	Criteria	Incentive	Due Date
Early Bird Award (No application needed)	Any PTA submitting 50% of the previous year's membership by September 25th will be eligible to win!	PTAs who have met the criteria will be recognized and entered into a drawing for a buy one, get one free registration to the Utah PTA Leadership Convention.	Sep 25
On Target Award (No application needed)	Any PTA submitting 75% of the previous year's membership postmarked by October 25th will be eligible to win!	PTAs who have met the criteria will be recognized and entered into a drawing for a buy one, get one free registration to the Utah PTA Leadership Convention. (2 winners)	Oct 25
Trailblazer Award (No application needed)	Any PTA submitting 100% + 1 of the previous year's membership postmarked by November 25th will be eligible to win!	PTAs who have met the criteria will be recognized and entered into a drawing for a buy one, get one free registration to the Utah PTA Leadership Convention. (5 winners)	Nov 25
Beehive Award (No application needed)	Any PTA submitting 10% over the previous year's membership postmarked by December 25th will be eligible to win!	PTAs who have met the criteria will be recognized and entered into a drawing for a PTA Tablecloth. (5 winners)	Dec 25
A Voice For Every Child Challenge (No application needed)	Given to PTAs that participate and meet the membership goal (set by Utah PTA) during the month of January for the purpose of increasing membership in preparation for the advocacy work of Utah PTA during the legislative session.	PTAs who have met the criteria will be recognized and receive a digital badge.	Jan 25
We [heart] PTA Contest (No application needed)	Given to PTAs that share the love of PTA with 14 new PTA members! Any PTA submitting 14 or more new PTA memberships by February 25th will be eligible to win! PTAs must have submitted PTA memberships prior to January 25th to be eligible.	PTAs who have met the criteria will be recognized and entered into a drawing for a buy one, get one free registration to the Utah PTA Leadership Convention. (4 winners)	Feb 25
Super teachers & Staff Award	Awarded to local PTAs that have 100% membership of their full-time faculty, administration, and staff.	PTAs who have met the criteria will be recognized and receive a buy one, get one free registration to the Utah PTA Leadership Convention.	Mar 1
MARS (Men are Really Super) Award	Awarded to local PTAs whose PTA membership has at least 40% male members including fathers, grandfathers, and male community members.	PTAs who have met the criteria will be recognized and receive a buy one, get one free registration to the Utah PTA Leadership Convention.	Mar 1
Super PTSA Award"	Awarded to any local PTSA with 40% or more student membership.	PTSAs who have met the criteria will be recognized and receive buy one, get one free registration to the Student Leadership Convention.	Mar 1
Award of Excellence in Membership Promotion	Awarded to two local PTAs or PTSAs that exhibit excellence in promoting PTA membership through an innovative, comprehensive, and successful membership recruitment campaign.	Winners will be recognized and receive a \$100 donation to their PTA.	Mar 1

<i>Double Your Membership</i>	Awarded to local PTAs whose PTA membership is at least 100% over last year's total membership by March 1st. PTA must have been organized and in good standing for a minimum of two years before application date to be considered for the award.	PTAs who have met the criteria will be recognized and receive a prize.	Mar 1
<i>What is Your PTA Story?</i>	Open to all PTA members. Submit your own, personal story about how you became involved in PTA and why you think it is important for all parents! Stories may be featured on Utah PTA social media.	One winner will be chosen to receive a PTA messenger bag.	Mar 1

Utah PTA L.E.A.P. Award

Leadership, Excellence, and Partnership (L.E.A.P.)



Leadership is often defined as “the art of getting or inspiring people to do something.” It is not the same as management, which is associated with accomplishing a task in an effective and efficient manner. A leader must often use different leadership styles, depending on the situation and group. People skills are a basic necessity in good leadership. A successful leader will involve everyone in the group in any decision-making that will affect them.

It is the desire of Utah PTA to recognize our committed volunteers. Within the membership of Utah PTA are leaders who steadfastly serve in various PTA positions and volunteer thousands of hours for the benefit of the children of Utah.

You can nominate any PTA leader for a L.E.A.P. Award. Here are a few facts:

- ♦ A person can complete one, two, or even three levels in one year.
- ♦ Someone else (like a president) can fill out applications for other people.
- ♦ All LEAP Awardees will be recognized in the Leadership Convention program and with a LEAP pin with level indicator.
- ♦ Many regions and councils also recognize awardees at spring trainings.
- ♦ Any PTA board member can complete any level of the L.E.A.P. Awards. Nominate a vice president, chairman, and committee member today.

The application is an online form. The link to the application for the L.E.A.P. Award is: utahpta.org/leadership-excellence-partnership-leap-awards

Utah PTA recognizes our committed volunteers with our L.E.A.P. Award

Utah PTA Gold Star Awards



The Utah PTA Gold Star Awards were created to recognize the outstanding PTA and PTSA units in our state. Utah PTA designates PTA/PTSA units that have done all of the required items and the additional elective activities (about 20 items total) as Utah PTA Gold Star PTAs and PTSAs. There are four levels: Local PTA, Local PTSA, Council PTA/PTSA, and region PTA.

If you follow best practices for running your PTA/PTSA and if your PTA/PTSA is in good standing, you will most likely qualify for this award. We recognize that it may also be overwhelming to know how to do everything that needs to be done to be a PTA/PTSA in good standing. The award requirements are designed to help PTA/PTSA leaders know the items they can focus on to fulfill their roles in helping their students and their school communities.

Each Utah PTA Gold Star Designee will receive a framed certificate to display in their school and will be recognized and celebrated at Utah PTA Leadership Convention. We will also highlight designees throughout the coming year as we promote the program.

All local PTAs, PTSAs, councils, and regions should apply! Each level has its own set of requirements. Each level's requirements and online application will be announced at the beginning of the school year. Information will be available online and through your region director.

All requirements, the online application and other tips can be found at: utahpta.org/Gold-Star-Leadership-Awards

Utah PTA Arts Grant and Supply Grant



Utah PTA believes cultivating the arts is important to Utah's children, and participation in the arts can make a notable difference in a child's abilities, talents, and self-esteem. With support from the Utah Division of Arts and Museums, Utah PTA has grant money available to encourage local schools to develop, participate in, promote, and provide quality art programs. This grant is offered to schools annually to assist in this effort.

What is the Utah PTA Arts Education Grant?



The Utah PTA Arts Grant supports local PTA efforts for arts education activities in their school. Funds are granted one dollar for each dollar (1:1) the local PTA contributes, up to an amount set by the Utah PTA Art Education Grant Committee. Any local PTA/PTSA in good standing (current bylaws, current paid membership, and beginning and end of year paperwork submitted) is eligible to apply. The grant may be used to create or enhance an existing PTA arts program or project, hire a guest artist, provide professional development to teachers, purchase musical scores, instruments, theater rights, props, scenery, costuming, and expertise to support student performances and productions or any other art program needs. You are only limited by your imagination.

You may not use this grant on general art supplies, field trips, student transportation, admission tickets, or funding expensive commercial art programs. Any supplies approved must be specific to the approved project.

What is the Utah PTA Arts Education Fund?

It is a fund that supports local PTA efforts for arts education activities in their school. Funds are granted one dollar for each dollar (1:1) contributed by the Local PTA unit. Amount determined by the Utah PTA Arts Education Grant Committee.

Who is eligible to apply for Utah PTA Arts Education Grant?

Any Local PTA/PTSA with bylaws and membership in good standing.

What may the grant be used for?

The creation or enhancement of an existing PTA arts program or project. Musical scores, instruments, theater rights, props, scenery, and costuming, etc. Expertise to support student performances and productions. Any other art program needs. You are only limited by your imagination.

How do we apply?

Fill out and submit a Utah PTA Arts Education grant application. Application may be found online at www.utahpta.org/arts-educationsupplies-grant

When is it due?

Applications are due on March 1.

Who awards the funding?

The Utah PTA Arts Education Grant Committee composed of parents, educators and community leaders award the grants.

When will the funds be awarded?

Funds will be available July 1 for the upcoming fiscal year.

What else is required?

The arts program must be developed and facilitated by the PTA in cooperation with the school administration. PTAs must match funds. PTAs must submit a final report form as soon as the arts program is finished or no later than June 1.

What is the Utah PTA Arts Supplies Grant?



It is a fund that supports Local PTA efforts for arts activities in their school. Funds are granted one dollar for each dollar (1:1) contributed by the Local PTA unit. This grant supports the supplies needed to run a PTA/PTSA art program and/or project. This is a separate grant. The amount of each grant is determined by the Utah PTA Arts Education Grant committee and is dependent on available funds. Recipients are determined by a drawing of eligible applicants.

Ideas for Arts Education Grants

- ♦ A dance instructor coming to instruct and teach children areas of dance.
- ♦ A bookmaking artist teaching children the art of bookmaking and making their own book.
- ♦ Learn the skills of poetry and carry out a poetry contest either in writing or out loud.
- ♦ Invite film makers to give instruction on how film is made. Have a film festival.
- ♦ Visual artists can teach skills to create a school project. (i.e. mural of students art)
- ♦ Have cultural groups come and teach their culture through art, dance, and music.
- ♦ Have students write stories that can be carried out on stage or a puppet play.
- ♦ Have storytellers come and share their expertise. Students can write stories and do the same.
- ♦ Invite music artists to share their music.
- ♦ Have students create musical instruments.
- ♦ Create comic or cartoon stories of issues facing children today.

Things to Remember

As you apply for an Arts Education Grant, please explain what your PTA hopes to achieve and how the money will be used. Your PTA must provide matching funds. Grant applications are to be submitted by March 1, of each year and grant recipients will be notified by June 1 of the same year. To receive your first grant check, you must sign an agreement stating that you will provide a summary of your project at completion, or we will request a refund of the Grant money, and you will not receive the final grant payment.

Fill Out the Application

Please fill out the application online form as completely as you can. The available funds are limited and there needs to be a clear understanding of what your PTA would like to achieve. We will use the information in the first sections to contact you about the grant as necessary. Applications will not be considered if incomplete or matching funds are not obtained.

When filling out the budget summary, please include ALL monies you plan to spend, not only the money you are requesting from the grant.

Attach a letter of support from the school administration concerning the planned art project. Up to \$500.00 is available per school year with a one-to-one match.

Follow-up Activities

Two-thirds of the grant amount will be paid out by August 1st. The remainder will be paid after the Utah PTA receives a brief evaluation and report of the completed program. The form for the evaluation and report will be sent with the initial payment.

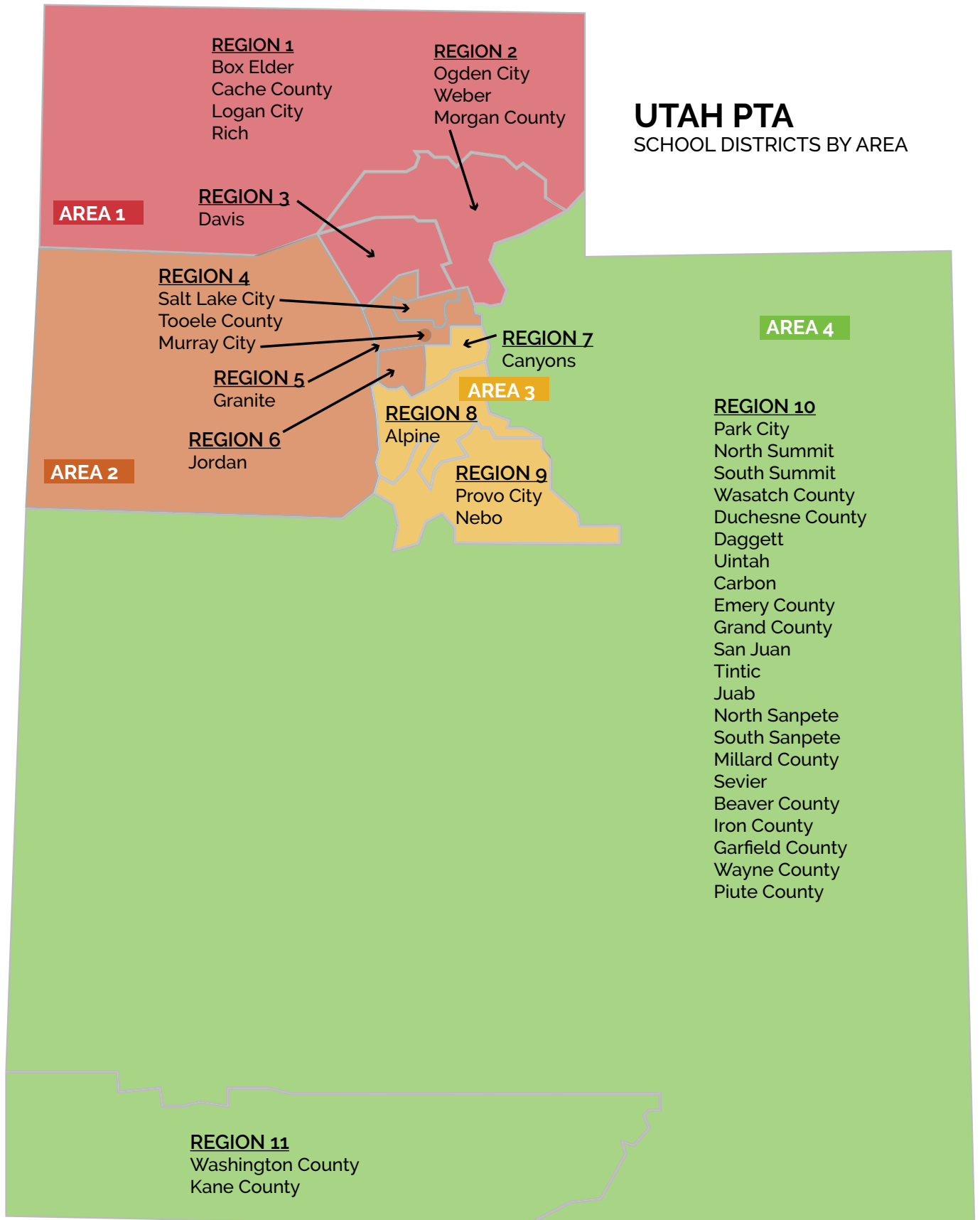
If you have suggestions for streamlining the application and disbursement process, please share them with us. Send suggestions to artsgrant@utahpta.org.

We wish you all the best as you plan and implement arts programs for our Utah children.

For complete rules, guidelines, timelines and grant ideas including writing tips and program ideas, visit utahpta.org/arts-education-grant

UTAH PTA

SCHOOL DISTRICTS BY AREA





STAY CONNECTED TO UTAH PTA ALL YEAR

UTAH PTA

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Fax: (801) 261-3110

Email: kids@utahpta.org

Website: utahpta.org

Office Hours

Monday - Thursday

9:00 am - 3:00 pm

Closed Friday | Closed holidays

Please call before you come
to ensure office is open.



@UTAHPTA

Facebook Groups that you can join:

Utah PTA Advocacy

Utah PTA Super Secondary

Utah PTA Excellent Elementary

Utah PTA Treasurers

Utah PTA Reflections

Utah School Community Councils

Utah PTA Teachers

Utah PTA Battle of the Bands

National PTA

1250 N. Pitt Street, Alexandria, VA 22314

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