

WELCOME TO 2024 LEADERSHIP CONVENTION

Session will begin soon

*While waiting for the class to begin, if you haven't done so already,
please go to utahpta.org and create an account.*





DEVELOP
ADVOCATE
ENGAGE

UTAH

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

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.

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

Council President Training



I'm a Council President!

Now what?!



Resources to Help You

- **President Handbook**
- **Bylaws- UtahPTA.org/bylaws**
- **Region trainings & meetings**
- **Other workshops from Convention**
- **Practical PTA**
- **Facebook groups (Utah PTA Excellent Elementary and Utah PTA Super Secondary)**
- **Your outgoing Council President**
- **Utah PTA is here to help you!**



Duties and Responsibilities of a Council President & Council Board:

- Strengthen local PTAs
- Develop leadership through training
- Distribute information from Region, Utah PTA, and Nat'l PTA
- Install local PTA boards
- Promote membership
- Provide financial training and information



Duties and Responsibilities of a Council President & Council Board (continued):

- Be a channel of communication between school administrators, school boards, and the general public
- Provide an opportunity for local PTAs and their presidents to exchange ideas and plans, and to solve mutual problems through meetings and workshops
- Provide pre- and post- Convention training (*may be in collaboration with the Region*)



Tools for Council Presidents



Tools for Council Presidents

1. President Handbook
2. Council President Handbook
3. Council and Region Financial Handbook
4. Bylaws *(Council & Local Bylaws and Standing Rules)*
5. Training



1. President Handbook:

- Bylaws
- Nominating Committees and Elections
- Financial
- Programs



2. Council President Handbook:

- Council Bylaws
- Checklist
- How to Run a Meeting
- Overview for Starting a New PTA
- Finances
- Installation of Officers



3. Council and Region Financial HB:

- Insurance
- Beginning of the Year Financial Forms
- End of Year Financial Forms
- IRS Filing
- Sales Tax



4. Bylaws:

- Council Bylaws
- Local PTA/PTSA Bylaws



A meme featuring Woody and Buzz Lightyear from the movie Toy Story. Woody is on the left, looking slightly concerned. Buzz is on the right, wearing his green and purple space suit and holding a purple lollipop. The background is a simple indoor setting with a door and a wall.

BYLAWS,

BYLAWS EVERYWHERE

Bylaws

Questions about your PTA that your bylaws can answer:

- When do they expire (first page, red stamp)
- PTA Unit ID number and EIN (first page)
- When & how to elect a nominating committee (Article VI)
- What officers you should elect and when, and length of term (Article VI, Section 4)
- How to fill a vacancy (Article VI, Section 7)
- How many members constitute a quorum for transacting business (Article IX, Section 2)
- When to submit dues and the amount (Article V)

Let's look at YOUR bylaws!



How to View Your Bylaws Online

1. Go to utahpta.org
2. Create an account
3. Sign in to your PTA account
4. On the Home page, click “Bylaws” under Quick Links - **OR** - on the Tools tab dropdown to “Bylaws”
5. On the Bylaws page, choose “View your unit’s bylaws”
6. Find and view your bylaws



BYLAWS QUIZ:

TRUE

FALSE

TRUE

FALSE

Bylaws are more of a “*guideline*”
than a hard and fast set of rules.



FALSE



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)*.



TRUE

FALSE

If a bylaw doesn't "fit" your PTA, it can just be ignored.

FALSE



Bylaws define the rules under which you function and are the ruling document for every PTA.

Bylaws cannot be suspended.



TRUE

FALSE

Bylaws must be submitted to Utah PTA for renewal every three years.

TRUE



Bylaws must be submitted to Utah PTA for renewal every three years...*even if you are not changing anything.*



Bylaws

- **Keep a list of all the PTA schools in your Council and when their bylaws expire.**
- **Remind them of the dates and the process for renewal.**
- **Train Presidents how to find expiration dates on the website.**



Standing Rules

- “Guidelines for Standing Rules” can be found at utahpta.org/guidelines-standing-rules.
- All councils and local PTAs/PTSAs should have their own set of standing rules.
- Vary greatly from one PTA to the next. Each set of standing rules is unique. No two are alike because no two PTAs/PTSAs are alike.



Standing Rules

- Procedures or general policies, not covered in the bylaws, that provide for the day-to-day operation of your PTA/PTSA.
- Make frequent/common actions simpler and provide for fairness and continuity of the board decision.
- Adopted and/or amended by a majority vote.
- Unique to each specific PTA and do not need to be sent to the state office.
- Cannot be in conflict with bylaws, IRS regulations or nonprofit law.
- Supplement the Unit Bylaws.
- Must be retained in your officers' procedure books and passed on to incoming officers.

For more detailed information, please see President HB pages 49 and 107.



| STANDING RULES | BYLAWS |
|---|--|
| <p>Standing Rules relate to the details of the administration of the organization.</p> | <p>Bylaws contain the basic rules of the organization. They supersede all other rules except the corporate charter if there is one.</p> |
| <p>Standing Rules generally are not adopted at the time a PTA is organized, but individually if and when the need arises. They are adopted to supplement and interpret the bylaws.</p> | <p>Bylaws must be adopted when a PTA is organized.</p> |
| <p>A Standing Rule is adopted by a majority vote at any business meeting without previous notice and continues in force until it is rescinded or amended. Generally, Standing Rules are amended by two-thirds vote with previous notice or by a majority vote when prior notice has been given.</p> | <p>Bylaws cannot be amended without previous notice to the members and the vote of a specified large majority. PTA bylaws must include certain articles and verbatim language mandated by the National and State PTA. These articles and sections cannot be amended, altered or deleted.</p> |
| <p>Local and Council PTA Standing Rules require no approval from the State PTA, but they must not conflict with the bylaws.</p> | <p>Local and Council PTA bylaws must be approved by the State PTA.</p> |
| <p>A Standing Rule can be suspended for the duration of any session.</p> | <p>Bylaws cannot be suspended.</p> |

5. Training:

- State
- Region
- Council
- Local



Meetings

Council Executive Committee Meetings and Council Meetings



Who are the Elected Officers?

Officers=Executive Committee [See Council Bylaws Article VIII, Section 3.a]

- a Council president
- a Council president-elect
- __ (number, at least 2) vice presidents*
- a Council secretary
- a Council treasurer

*Must include a teacher & an administrator (from different schools)



Officers

- Officers=Executive Committee
- Elected through the nominating process [See Council Bylaws Article VIII, Section 4] by the voting body of the Council.
- Assume their official office July 1, following the election.



What Does the Council Executive Committee Do?

Council Bylaws Article X, Section 2 a-l:

- Plan and set council meeting dates
- Transact business
- Create commissions and special committees, appoint commissioners
- Develop budget (to be distributed and approved by voting body)
- Act in emergencies between regular council meetings
- Fill vacancies
- Appoint auditor or AFR committee



Who's on the Council Board?

- Officers (Executive Committee)
- Board Members



Who's on the Council Board?

- Officers
- Board Members



Who are Board Members?

- EC (officers), commissioners, superintendent of schools (Council Bylaws Article XII, Section 4)
- From each local PTA: president, president-elect, principal (Council Bylaws Article VII, Section 4)



Council Meetings

Who attends?

How often do we meet?

What is on the agenda?



What is on the Agenda?

Every Council meeting *must* include:

- Agenda
- Minutes
- Treasurer's Report



Council Meetings May Include:

- Leadership training
- PTA Awards and volunteer recognition
- Information received from Region meetings or Nat'l PTA
- Highlight a different school PTA at each meeting
- Membership Tips-to promote and incentivize membership



Minutes

It is recommended that minutes include the following:

- Name of your PTA
- Date, time, and location of meeting
- Type of meeting (executive, board, general, etc.)
- Name of person conducting and those taking part
- “Roll” (present and excused) and if a quorum is present
- Agenda was presented and adopted
- Minutes were presented and approved (list any corrects)
- All action taken (adopted or rejected)
- Brief account of reports from committees/chairs (list new business or action taken)
- Financial report (no vote is taken) and who is presenting it
- Start and end times
- Place for the signature of the secretary (to be signed and dated after minutes are approved)



NOTE:

Utah PTA and National PTA recognize one president, one president-elect, one treasurer, one secretary; no co-presidents, etc.



Has everyone joined PTA?

Council Bylaws Article IV, Section 11:

“Only members of a local PTA/PTSA who have paid dues for the current membership year may participate in the business of this Council.”



Other meetings to attend

- Region Meetings
- School Board Meetings
- Advocacy Conference
- PTA Day at the Capitol
- Pre-Convention Orientation
- Leadership Convention
- Post-Convention Training



Council President Checklist



Found in Council President Handbook p. 20



Council President Checklist

- Meet with Outgoing Council President
- Meet with Council Officers



Local Reports

Encourage the local PTAs to file Local Reports!

Report dates:

Report #1 opens November 1/due November 15

Report #2 opens February 1/due February 15

Report #3 opens June 1/due June 30





WHAT
WOULD
YOU
DO?



QUESTIONS?

ANSWERS!

CONNECT WITH US ON SOCIAL MEDIA



FACEBOOK

- Utah PTA
- Utah PTA Advocacy
- Utah PTA Super Secondary
- Utah PTA Excellent Elementary
- Utah PTA Treasurers
- Utah PTA Reflections
- Utah School Community Councils
- Utah PTA Teachers

CONNECT WITH US ON SOCIAL MEDIA



INSTAGRAM - @UtahPTA



X - @UtahPTAOneVoice



PINTEREST - Utah PTA



YOUTUBE - Utah PTA One Voice



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