

Welcome to 2025 Leadership Convention

This session will begin soon



3A - President and President Elect 101

Presenters:

Corey Fairholm - Utah PTA President

Julie Cluff - Utah PTA President Elect

Charissa Little - Utah PTA Regions VP



What this Session will Cover:

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.

- Why PTA and Why now?
- Leadership and Meetings
- Board and Community Engagement
- Communication and Volunteer Management
- Problem-Solving and Representation



Start with the Mission

The PTA Mission:

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



Vision of Utah PTA

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.



Why PTA? Why be a Leader?

- Why do you personally do PTA?
- What makes a good leader?
- What is the PTA difference?

There are personal reasons why each person gets involved in PTA, but many stay and do more because of the common purposes of PTA.



What Makes a Good Leader



What Makes PTA Different

Structure of PTA gives a built-in support system

Member → Local → Council → Region → State → National

- National Organization = training tools from all levels
- Utah PTA provides all local and council units under its umbrella non-profit status which allows each PTA unit to fundraise and be tax exempt in Utah
- History has given PTA its own unique way to do things which is what we will talk about today



Leadership Basics and Meetings



In Good Standing

Bylaws Article IV, Section 1

- Follows purposes of PTA and bylaws
- Membership dues paid
- Current bylaws
- Year-end financial statement and Annual Financial Review (AFR)
- Budget and minutes
- Officers and contact information
- Proof of insurance
- Signed forms: “Ethics/Conflict of Interest Policy” and “Basic Fiscal Management Procedures”
- Two officers attend leadership training
- Responsible financial procedures
- Local reports #1, #2, and #3



Resources to Help You

- President Handbook
- Council trainings & meetings
- Other workshops from Convention
- Practical PTA & PTA University (website)
- Facebook groups
 - Utah PTA Excellent Elementary
 - Utah PTA Super Secondary
- Your outgoing President
- Utah PTA is here to help you!



Bylaws - # 1 Resource

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 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

Attend 5A - Bylaws are for Everyone to learn more about Bylaws.
Thursday, May 8th 1:30 to 2:30pm.



Transition Period

- When does the transition period begin?
- Write it down, clean it out, pass it on!
- Support the new PTA leadership!

For more information
see President Handbook page 22.



Meet with the Principal

- The principal is a member of the executive committee
- Develop a good working relationship, talk about roles, responsibilities, and expectations
- Have positive, open, and transparent communication
- The principal should attend PTA board meetings and have time on the agenda
- Coordinate dates with the PTA calendar and school calendar

Remember: *We are in the principal's school as a guest; however, the principal must also understand that we are governed by our bylaws, which may limit the PTA's response to some requests.*



Organize Your Board

- Refer to the President HB page 28 for more details.
- Are members of your board elected or appointed? (*Check your bylaws Article X, Section 3*)
- Commissioners and chairs that are appointed by the executive committee serve for one year; may be reappointed for another year. (*Reflections, membership, legislative, health & safety, etc.*)
- Page 29 has a great sample board makeup



Plan Your Year

Includes:

- Calendaring: coordinate with school calendar (*refer to "Calendar" in the President HB pages 35-44*)
- Set time/date/place for meetings (*including at least 3 general membership meetings*)
- Conduct a needs assessment to set goals (*President HB pages 33-34*)
- Plan a membership drive
- Budget meeting with your board



Meeting the President Chairs

- Executive Committee Meetings
- PTA Board Meetings
- General Membership Meetings

Additional information can be found in the President
HB pages 36-37



Other Meetings President Attends

- Council Meetings
- School Board meetings (1-2 times a month - *can assign someone*)
- Utah PTA Leadership Convention (*in the spring*)
- Advocacy Conference (*in the fall*)
- PTA Day at the Capitol (*usually in February*)



Executive Committee Meetings

- EC members are elected officers and are defined in the bylaws (Article VI, Section 4a)
- Meet during times when the board is not meeting (summer and in between board meetings)
- EC plans the dates for general membership meetings
- EC fill vacancies (except president-elect)
- A member of the executive committee is on the nominating committee
- Receives the initial report of the nominating committee
- A financial report is given and minutes are taken



PTA Board Meetings

- Who attends:
 - Board of Directors - Executive Committee and Commissioners, including Principal and Teacher VP
- Held regularly (*usually monthly*) throughout the year
- Have an agenda and keep minutes
- Begin with thought and pledge
- Treasurer gives financial report at every meeting
- Collect volunteer hours
- Share upcoming calendar of events
- Invited to attend and report
 - Board of Directors
 - Upcoming or recent event and program chairs
 - Any PTA member can attend with voice, but no vote



General Membership Meetings

- Hold at least three General Membership Meetings each year *(may be held in person or virtually)*.
- Dates and times of all three meetings must be announced to all members.
- All PTA members must be invited to attend.
- Minutes are taken.
- A financial report is given at each meeting.



General Membership Meetings

Article X, Sections 1-5:

- The **budget** is adopted at the first general membership meeting of the year (before September 30).
- The **nominating committee** is elected at a general membership meeting before December 31.
- The **officers are elected** at a general membership meeting before March 31.



Agendas

- An agenda is a list of items to be discussed at a formal meeting.
- All PTA meetings should have an agenda.
- All board members should be given the opportunity to add items of discussion or action on the agenda.
- Order of Meeting should follow the Agenda

Name of PTA

Date and Time (beginning to end)

Location of meeting

- I. Call to Order: PTA President
- II. Reverence:
- III. Pledge:
- IV. Minutes: Secretary
- V. Financial Report: Treasurer
- VI. Officer & Commissioner Reports (time allotted)
 1. President
 2. President-elect
 3. Membership Vice President
 4. Teacher
 5. Principal
 6. Commissioners
 7. Other
- VII. Calendar: Upcoming Events
- VIII. Assignments
- IX. Special Guests (optional)
- X. Date of next meeting



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)



Minutes - How to Record a Motion

- Who made the motion
- Text of the motion
 - Consider having the maker of the motion write down the motion, so everyone understands exactly what is being considered
- There **MUST** be a second to the motion (but the “who” does not have to be recorded)
- Discussion
 - You may just note that a discussion was held. Who said what does not have to be recorded.
- Outcome of the vote
 - Motion passed
 - Motion failed
 - Motion passed with two nay votes



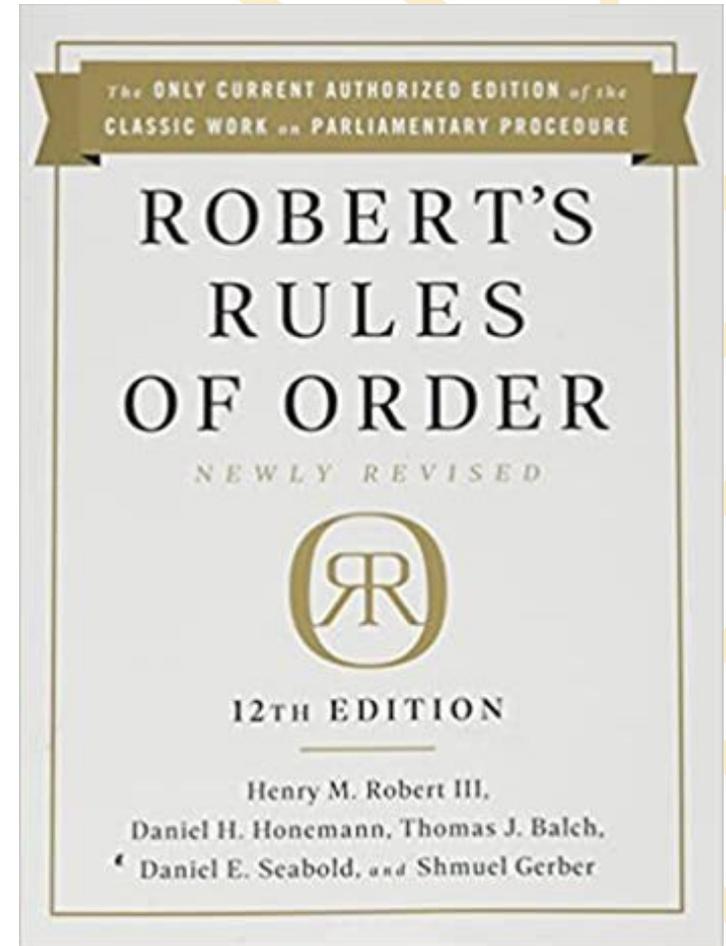
Parliamentary Procedure

The purpose of Parliamentary Procedure is to facilitate fair, orderly, and democratic decision-making within a group by ensuring equal rights for all members to participate in discussions and voting.

Use of parliamentary procedure ensures:

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

Utah PTA follows Robert's Rules of Order Newly Revised per Bylaws Article XV.



Reports 1, 2, 3

Report Number	Report Opens	Report Due
Report #1	November 1	November 15
Report #2	February 1	February 15
Report #3	June 1	June 30

Submitted three times a year on www.utahpta.org

Why Reports?

Give Utah PTA needed information about your unit

Report of Volunteer Hours

Request needed training

Part of Good Standing



Board and Community Engagement



Using Committees

Committee Examples:

- Reflections
- Hospitality
- Reading Club
- Student Club
- Communications
- Membership
- Ribbon Weeks
- Family Nights

- Committees are the backbone of PTA.
- They conduct the work and pull off all your programs and events.
- They are the heart of PTA.
- Committees are where you find future leadership
- Committees help bear the load – many hands make light work



Learn about Utah PTA Committees



Organizing Commissions, Committees, Programs or Events

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

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

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

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

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



How to Organizing Commissions, Committees, Programs or Events

General guidelines to be host successful PTA events, programs, etc.

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

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

Step 3: Planning meetings – Anything runs better when planned.

Step 4: Program or event is held

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



Working with Admin and Teacher VPs

Administrative VPs play a significant role in a successful PTA. As a member of the Local PTA Board, the Administrative VP working side-by-side with the PTA President and other officers create the “PTA culture” on that campus. Communication, planning and delivery of meetings, programs, and events will determine how members view the PTA’s relevance and value.

The Teacher VP should act as a liaison and communication link between the PTA Board and the faculty. The Teacher VP, and the PTA Board can effectively work together in accomplishing PTA purposes and programs, better communicate, and support one another, so the mission of PTA can be more fully accomplished.



Needs Assessment

Needs Assessments determine what is important to the community you are serving and what your PTA should be doing

- Paper or online are acceptable
- Generic or personalized – no rule against either
- Doing one at the beginning of the year and then again at the end is a great way to survey what the community liked and didn't like
- The School of Excellence has a great needs assessment survey built into the program.
 - Beginning Assessment that will give you a road map to solve identified problems.
 - End of year assessment that will show growth.



Membership - Year Round

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 more members you have, the larger your local PTA voice.

- Have a plan to grow with a good campaign
- Consider membership awards to help you along the way
- Use membership rewards and incentives
- Ask everyone to join using your PTA Why!
- Have a PTA did this sign at every event and program
- Remember to remit dues by the 25th of each month to be in Good Standing



Communication and Volunteer Management



Communication Tools that Work

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.

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



Volunteers - We need U

Successful volunteer programs are able to create a positive work experience by providing the organization and support to the volunteer and their job assignments.

People who donate their time naturally expect to have a positive experience.

Effective volunteer management incorporates many things that contribute to a positive experience for the volunteer.



Volunteers - We need U

How do we (PTA) provide organization and support to potential PTA Volunteers?

- Procedure books
- Volunteer sign ups
- Clear job descriptions and expectations
- Job training and post event summaries
- Follow thru

How do we make a volunteer's experience positive so that we want to keep helping?

- Care about them
- Communicate with them
- Ask their input – make them part of the team
- Appreciate them



Volunteers - We need U

How to Get Volunteers

- Personally ask people
 - Opening social for the purpose of meeting parents and recruiting volunteers
 - Ask friends
 - Send them an invitation
 - Have each board member ask someone they know
- Don't say no – use them somehow
 - Don't turn a volunteer away
 - Ask them what they can or would like to do
 - Give them parts of your job
- Value their time and talents
 - Don't ask an accountant to sit and cut out paw prints for hours
 - Have a volunteer survey to see their interests and talents
 - Don't be afraid to start a new program to utilize a new volunteer



Volunteers - We need U

- As a PTA Leader, you want to give your volunteers everything they need to be successful.
- Clearly define roles and expectations to avoid confusion. Being organized from the very beginning takes time and effort, but can eliminate confusion later.
- The more information you give, the better they will understand the job in front of them.



Procedure Books

Book or set of files for any position, event or committee within PTA.

The book contains the information about what was done in the past and what did and didn't work.

A new person to that position should be able to read that book and then understand how to move forward.

See handouts and examples on the Leadership page of www.utahpta.org for how to organize Officer and Committee procedure books

What is in a Procedure book?

- Bylaws and Standing Rules
- Budget
- PTA Calendar
- Training materials relevant to this position
- Local Unit materials: agendas, minutes, assignments
- Job/Event/Committee Descriptions
- Committee Contact List
- Summaries of previous years' events



Awards Opportunities

Utah PTA Awards

Gold Star Awards

L.E.A.P. Awards

Membership Awards

National PTA Awards



- Recognize the great people in our school and on our PTA boards
- Assign someone now to do awards
 - Take pictures during activities to submit with award applications
 - Ask board or parents for comments
- Recognize award nominees at a board meeting
- Due March 1



Trust Lands and School Community Councils

Utah PTA has been advocating for Utah's children for over 100 years. Nearly 50 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 (SCC).

While PTA does not have a quartered spot at the table, PTAs should have someone attend and report back to the PTA from each SCC meeting. Having a good working relationship with the SCC is key to building community.



Givebacks

- Compliance
 - Financial and Officers entered
- Communications
 - Newsletters, hubs, messages, texts
 - Receive communications from Utah PTA
- Membership Dues
- Website and Online Store

2 workshops on Givebacks

- 4H - New to Givebacks
- 6D - Already Know Givebacks? Attend this Class!



Problem Solving and Representation



Councils

- Restructure will put each local unit into a council
- Councils
 - Monthly training and contact
 - Resources from Utah PTA
 - Networking opportunities with other leaders
- Local PTA units should not see a negative impact or decrease in services
- Any local unit with dues under \$6 will need to amend Bylaws before July 1, 2025.



Conflict Management

Conflict in PTA usually revolves around three areas:

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

Some conflicts may be avoided when you are:

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



Conflict Management

Problem Solving Pointers:

- Identify the problem - be specific without assigning blame.
- Make sure both sides are heard.
- Listen carefully, wait, and give feedback to make sure you understand.
- Sometimes people just want to be heard.
- Ask positive questions and listen to the person. “What happened?” “What do you want me to do?” “What are the possible solutions?” Allow them to pause and think. They might come up with their own solution.



Conflict Management

Things to remember

- Conflict is everywhere –do not fear it
- Conflict can be healthy
- If becomes destructive, you must act
- Be aware of perceptions, avoid assumptions
- Communication is the key –be open and neutral



Wrapping it Up



Keys to Success



Team

[teem] noun

An amazing group of talented people who work together to reach their common goals.

People with complementary skills who achieve more together than they would without each other.

i.e. the key to success



Next Workshop

- 5A - Bylaws for Everyone
- 6A - Officers Q&A

Other Workshops....

- 4C - PTA Programs and Family Engagement
- 4D - Conflict Resolution through Kindness
- 4G - Awards Made Easy
- 4H - New to Givebacks

- 5C - Membership Campaigns that work
- 5G - Fundraising Fundamentals
- 5H - Empowering Student Leaders
- 5I - Putting the T in PTA



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
- Utah PTA Battle of the Bands



Connect with us on social media

INSTAGRAM - @UtahPTA



X - @UtahPTAOneVoice



PINTEREST - Utah PTA



YOUTUBE - Utah PTA One Voice



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