

Utah PTA Council President Training

PTA Line of Communication

Local

Council

Region

State

National

What is a council

- A council is three or more local PTA/PTSA 's organized under the authority of Utah PTA which operates under council bylaws approved by Utah PTA.
- Council follows the council bylaws
- The council board is composed of officers as stated in council Bylaws.
- Key link in the line of communication between local PTA and Region, Utah PTA and National PTA

Mission of PTA

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, well-being of all children and youth.

Duties and Responsibilities of a Council

- PTA Mission focused
- Strengthening local PTA's
- Develop leadership through training
- Promoting membership
- Cooperating with other organizations to achieve common goals within the PTA framework
- Distributing Utah PTA and Region Information
- Installing local PTA Boards
- Coordinating the efforts of local PTA/PTSA's
- Being a link through which local PTA's can work on projects or programs beyond the scope of a single PTA
- Being a channel of communication between school administrators, school boards, and the general public
- Providing financial training and information
- Pre and Post Convention Training working with the Regions

A Council helps each local PTA to:

- Learn and use good PTA practices and apply Utah PTA policies
- Increase its capacity for transformative family engagement to home, school and community.
- Compare methods of work and share problem-solving information and techniques with other PTA's
- Stay informed, at all times on legislation affecting children
- Be financially sound
- Install local boards
- Conflict management strategies

Tools for the Council President

- President Handbook
- Council President Handbook
- Council and Region Financial Handbook
- Council President Checklist
- Bylaws and Standing Rules

Meet with your council board

- Officers are to be elected through the nominating process (outlined in the Council Bylaws)
- Board members can also be appointed, refer to Council Bylaws. for example commissioners, reflections
- Each council board member should have a job description and receive training
- Utah PTA and National PTA recognize one president one president elect, one treasurer, one secretary
- Plan your year (reflection date, battle of the bands, budget)
- Where will you be holding meetings
- Council Board sign the conflict of interest and basic fiscal management form
- Council presidents hold meetings with the local schools PTA – occurrence is listed in the bylaws

Council Meeting

- Agenda and minutes
- Council board set the agenda for your meeting with locals schools
- Invite district representative and principals to council meetings
- Treasurers Report
- Promote at your meetings: Membership and PTA awards
- Train on the information that you receive at the Region Meetings
- Highlight a school PTA in your council, hold it at the school

Article VII: Voting Body

- Section 1: The voting body of this council shall consist of the ***elected officers (executive committee)*** of this council, the ***council commissioners***, the ***superintendent of schools*** or his representative, and the designated members of each PTA/PTSA specified in Section 2 of this article.
- Section 2: Each member of PTA/PTSA shall be entitled to representation on the voting body of this council by its ***president*** or his alternate and ***president-elect*** or his alternate (An alternate is selected from their local PTA/PTSA board.) and the ***principal*** or his representative.
- Section 3: Members are entitled to one vote even though they may be in more than one position.

Membership/Dues

- Council Dues are listed in the Bylaws under Article II, Section 2- usually about 25-50 Cents per member
- \$2.25 goes to National, \$1.75 State= \$4.00 from local
- Incoming council dues are reported as income in your budget
- Region Directors will give you an updated membership #'s, make sure it matches the # that was submitted to council

Why PTA?

- Charitable Solicitation- PTA's receive because of oversight of Utah PTA
- Trainings
- Utah PTA has secured a 501 (3)(c) exemption ruling from the IRS, recognizing it as a public charity
- PTA in good standing is covered under the Utah PTA's group exemption
- IRS requires PTA to submit annually a list of subordinate units in good standing
- Contributions to Utah PTA and its subordinate units may be treated as charitable contributions
- 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.
- Purchases over \$1000 call Utah PTA Office for a tax exemption certificate.

Why PTA continued....

- To promote the welfare of children and youth in the 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 into closer relation the home, the school. Working together as a team.
- To develop between educators and the general public such united efforts as will secure for all children and youth the highest advantages in physical, mental, social and spiritual education.
- Under the 501 (3)(c), the PTA does not pay income taxes on it's fund raising projects.
- Utah PTA will also provide assistance to local PTA's with IRS Filings and correspondence and processes their sales tax refunds.

Why?

- PTA Programs- Reflections, Battle of the Bands, PTA Day at the Capitol, Advocacy Conference, trainings, White Ribbon, Red Ribbon
- Awards, Grants and Scholarships- PTA Awards, LEAP Awards, Art Grants, National PTA Awards and Grants, Student Scholarships, Gold Star Awards
- Leadership Training, Convention, Handbooks, Training and Support for Presidents, Treasurers, local leaders
- Financial Training
- Assist with IRS filings
- Maintains Charitable Solicitation Permits for locals
- Protects and Maintains nonprofit status for local units
- Commissions on Utah PTA who advocate for our children, locals and councils able to serve on these commissions

Council Financial

- Refer to the Council and Region Financial Handbook
- Council collects the local reports
- Review the financial timeline in the handbook to find out when everything is due.
- Council/Region Summary of Year-End Financial Reports
- Council/Region Beginning of Year Report- budget, board list, minutes, ethics/Conflict, basic fiscal management and insurance
- Council Insurance- all PTA with separate EIN that hold meetings or events need to have their own insurance. If local PTA hosts the council meeting, the council may be able to be covered as a guest of that PTA as long as that PTA agrees to file an insurance claim in the case of accident, check with school district

Online Local and Council Reports

- The List of questions for the reports are in the council president handbook
- Reports are due November 1, February 1, June 1
- File the report on utahpta.org
- Please encourage the locals to fill out the reports
- After the report is submitted, your Region Director will receive a copy of it by email
- Know the answers to questions on the report form. The questions asked on the report are listed on in the council president handbook and the president handbook.
- Volunteer hours are for the report period only.

Bylaws

- Bylaws are PTA/PTSA governing document
- 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.
- Bylaws should be reviewed every three years and submitted for renewal.
- Bylaws committee, post for 30 days for membership to review then send into the state offices. Will be returned by your renewal date with approval with red stamp on it.
- Keep a list of all the schools in your council and remind them of renewal and the process.
- Numbers written in the bylaws must be adhered to exactly.

Standing Rules

- Standing rules are the rules your PTA adopts to administer in affairs under the provisions of your bylaws
- Guidelines adopted by your local PTA for direction, training and continuity.
- Contain additional information about your bylaws or any traditions or specific information that pertains to your PTA
- Standing rules may not conform to and may not be in conflict with your bylaws, more flexible than bylaws
- Standing rules are generally developed and adopted as needs arise.
- Detailed guideline that contain additional information based on your bylaws
- Should include any specific, detailed duties and responsibilities of board members, ownership of equipment, needs assessment, meetings

Ethics/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.
- Members of the board serve in a fiduciary capacity and owe a duty of care, a duty of obedience, and duty of loyalty.
- Board members shall conduct themselves with integrity and honesty and act in the best interest of PTA
- Abide by Bylaws, policies, positions, procedures
- Refrain from making slanderous or defamatory comments
- Not misuse PTA's federal tax-exempt status

Managing Conflict

- Be a PTA professional by being positive, delegate, keep information confidential
- When there is unresolved conflict, everyone loses
- Listen to both sides of the story
- Talk about issues not people
- Think about the desired results rather than about rigid positions
- Be knowledgeable about PTA
- Be familiar with the Bylaws
- Follow the policies of PTA
- Be informed about the issues
- Cooperate and communicate with the principal and school district
- Ask for region and state help if needs arise!

Facebook groups

- Utah PTA Excellent Elementary
- Utah PTA Super Secondary
- Utah PTA Reflections
- Utah PTA Treasurer
- Utah PTA Advocacy
- Utah Community Council (SCC)
- Utah PTA Male Engagement (coming soon)

Council president emails

All council presidents should have a region email. It will be the name of the council @ utahregion#PTA.org.

Please contact your region Director to find out the password and to get set up.

Contact information

Melanie Hammer will be the new Regions Vice President
Her contact information is melanie@utahpta.org

Corey Fairholm- corey@utahpta.org

Follow Utah PTA



Facebook

Groups you can join:

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



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