



President and President Elect Training

Stacey Mollinet - President Elect

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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.

Figure out why you do it and the how will be easier.

Resources to Help You



- Read the President Handbook
- Read your bylaws - check expiration date
 - Keep a printed copy in your binder
- www.UtahPTA.org
- Local Leader Kit - www.ptakit.org
- Facebook groups - Utah PTA Excellent Elementary and Super Secondary

Resources to Help You



- Council and Region meetings
- Watch other workshops from convention
- Your outgoing President
- Utah PTA is here to help you!

PTA Benefits



- Utah PTA's 501(c)3 Nonprofit exemption with the IRS
 - PTA in good standing - Utah PTA submits list yearly
 - Exempt from income taxes on charitable contributions
 - Utah PTA provides assistance with IRS filings and correspondence
- Exempt from state sales taxes
 - Pay sales taxes on purchases under \$1000 and request a refund through Utah PTA
 - Ask Utah PTA treasurer for determination letter
 - for purchases over \$1000

PTA Benefits



- Exemption from Utah Charitable Solicitation Permit
- Training and support
 - Convention
 - Leadership Training throughout the year
 - Financial Training
 - Support through councils and regions

PTA Benefits



- PTA programs
 - Reflections, Battle of the Bands, Ribbon Weeks
 - Reading Week, Teacher Appreciation Week
- Awards, Grants and Scholarships
- Advocacy at the legislature
- Representation on statewide committees and commissions

Basic Fiscal Management



- Only treasurer has checkbook
- All checks have two signatures
- No blank checks with a signature!
- Checks are never made out to “cash”
- Three people for all counting of cash
- All money received is deposited the same day

Basic Fiscal Management



- Receipt for every transaction
- The monthly bank statement mailed to the PTA at the school address
 - Reviewed and signed by non signer
 - Reviewed and signed by President

Basic Fiscal Management



- Bank statements are reconciled in a timely manner.
- No ATM, debit cards, or credit cards in connection with PTA accounts.
- Treasurer's report at each meeting
- Principal reviews check requests and signs

In Good Standing



Bylaws Article IV, Section 1

- Follows purposes of PTA and bylaws
- Membership dues
- Current bylaws
- Year end financial statement and Annual Financial Review (AFR)
- Budget and minutes

In Good Standing



- Officers and contact info
- Proof of insurance
- Signed Conflict of Interest Form and Basic Fiscal Management Form
- Two officers attend leadership training
- Responsible financial procedures

Bylaws moving online



You are now able to view and renew your bylaws online!

- Go to My PTA Units under the profile icon
- Add your PTA unit and click on the unit name
- Open the bylaws pdf and download it or print it
- Keep a printed copy of your bylaws in your President's binder
- Instructions for renewing your bylaws can be found at www.utahpta.org/bylaws

Working with the Principal



- Work side by side with the principal
- Positive, open and transparent communication
- Understand the role of PTA and PTA leaders
- Coordinate dates with the PTA Calendar and school calendar
- Principal should have a copy of the bylaws
- Principal should attend the board meetings and have a part on the agenda

MemberHub – an Optional Tool



- Communications
 - Newsletters, hubs, messages, texts
- Website builder
- Fundraising - Auctions, A-thons, Crowdfunding, Event
 - Raffles are illegal in Utah
- Receive communications from Utah PTA
- Free 30 minute onboarding meeting with MemberHub and online trainings

Award Opportunities



Utah PTA Awards, Gold Star Award, Leap Awards

- Important to 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
 - Submit all 3 pages of supporting documentation
- Recognize award nominees at a board meeting
- Due end of January

Budgeting



- Treasurer is chair of budget committee
 - President and President Elect help
 - Consult with board members on their needs
 - Principal available to answer questions
- Start with last year's budget
- Executive committee approves it first

Budgeting



- Post so members can view budget before general membership meeting
- Quorum must be present at meeting
- Treasurer presents budget, answer questions, makes motion to approve
- Minutes kept of the meeting
- Budget and minutes due Sept 1

Board Meetings



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

General Membership Meetings



- Bylaws say 3 general membership meetings each year
- Minutes are taken and a financial report is given
- Could be combined with a school event (Back to School night, concert, play) or a PTA activity (guest speaker, movie night, art night) or during a board meeting if it is advertised as a general membership meeting
- Beginning of year - approve the budget and select nominating committee
- Spring - Nominating committee reports officers and elections are held
- Annual meeting - reports of officers, commissions, and committees
 - Could be combined with appreciation luncheon

Managing Conflict



- Be a PTA professional - be positive, delegate, keep information confidential
- The quicker the better for resolution!
- 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 and familiar with the Bylaws
- Follow the policies of PTA
- Cooperate and communicate with the principal and school district
- Ask for council, region, and state help if needed

Organize your Board



- Watch Workshop 1
- President's Handbook p. 25-26
- Make a list of all open positions
 - Send out an email
 - Post it on your social media
 - Put up a poster or white board inside the school entrance
 - Announce it at Back to School Night
 - Keep asking

Organize your Board



- Be specific about duties
 - Provide meaningful tasks
- Don't turn away offers of help
- Thank them
- Have every position keep a procedure book
 - Record of what was done
 - Guidance for future

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



Twitter



Pinterest



YouTube



Instagram

Utah PTA One Voice App

Sponsors

