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Leadership Resources: www.wastatepta.org/leadership

In the “Resources” section of the Washington State PTA website you will find resources available exclusively to PTA members. This page contains PTA & the Law Resources, Leadership Packet materials, Money Matters, and a variety of resources for PTA officers and members. To access the resources site before October 1, 2011, logon using “PTAmember” as your user name and “leader” as your password; beginning October 1, 2011 the user name and password will be the same as on the back of your National PTA Membership Card.

WSPTA Vision

“Making every child’s potential a reality.”

WSPTA Mission

PTA is

- a powerful voice for all children.
- a relevant resource for families and communities.
- a strong advocate for the education and well-being of every child.

Sample Job Descriptions



The term of office for presidents and vice presidents is one year (July 1st-June 30th).

No person shall serve in the same office for more than two consecutive terms. (from WSPTA Uniform Bylaws Article 5, Section 6(c))

The President

The president presides at all meetings and plans the meeting agenda ahead of time with the PTA secretary, utilizing input from others. The president must maintain impartiality when serving as the presiding officer at meetings and be knowledgeable of basic parliamentary procedure. The president should become familiar with the objects of PTA, the *Washington State PTA Uniform Bylaws*, and the unit or council standing rules and be aware of and utilize PTA resources from the council, State PTA, and National PTA.

The president has the responsibility of making appointments to positions and committees as designated in the local unit standing rules with the approval of the executive committee. The president should also make sure the names and contact information for officers are entered via WSPTA's online membership enrollment program or sent to the State PTA office when they are elected in the spring. If there are any updates throughout the year, please send the changes to the WSPTA office as well.

It is important that the president delegate responsibility, empower others and appreciate their efforts. She/he should attend leadership training and education, and encourage other offi-

cers, chairs and members to attend. She/he should communicate regularly with officers and chairs and maintain visibility to the membership. The president makes sure that all officers, chairs, and committee members are current PTA members. The president serves as an ex-officio member of all committees except the nominating committee. She/he should participate in the planning and conducting of an orientation for the board of directors.

It is the responsibility of the president to ensure that the unit participates in the election of the region director, and she/he should attend general council meetings with the other authorized delegates (if the PTA unit is a member of a council) as well as region trainings.

The president should have a positive relationship with the principal and staff and encourage PTA members to do the same. She/he should promote a positive image of PTA within the community.

The president should establish a process to have the monthly bank statement reviewed by a board member who is familiar with the operation of the PTA but not a signatory on the account. The original bank statement, should be provided directly to the reviewer unopened. This process is a best practice, and a requirement to maintain your bond insurance.

It is important that the president is aware of required deadlines for: the payment of membership service fees, registration for workshops and conferences, application for awards, and submissions for recommendations, as well as annual corporation report, charitable solicitations registration, insurance renewal, and Federal tax filings.

The Vice President

The Vice President shall perform the duties of president in the absence or inability of that officer to serve, and shall assist the president when called upon. In case of a vacancy in the office of president, the first vice president or the vice presidents in their order shall temporarily assume the duties until the vacancy is filled.

The position of vice president is one that can be adapted to the needs of each individual PTA. Look at the job description of the president and determine which tasks or duties can be delegated or shared by the vice president(s).

Things the President & Vice President Should Know...

1. The executive committee consists of the elected officers. A majority of current members constitutes a quorum.
2. The board of directors consists of the executive committee and any additional elected or appointed positions as specified in the local unit/council standing rules. A majority of current members constitutes a quorum.
3. Local unit general membership meetings may be open to all interested persons, but the privilege of making motions, debating, or voting is limited to current active members of the local unit.
4. A quorum for general membership meetings must be specified in the unit's standing rules but shall be no less than ten (10).

Absentee or proxy ballots are prohibited, unless the unit's standing rules allow for electronic voting for certain positions as set forth in the Uniform Bylaws.

- Regular meetings of the general membership should be conducted as established by the local unit standing rules to conduct business such as adopt the budget, approve the standing rules, elect the nominating committee, officers, and delegates.
- Special meetings stating the business to be conducted may be called by the president, a majority of the board of directors or five (5%) per cent of the membership with a minimum of ten (10) calendar days' notice to local unit members.

Committees

Committees are the method through which talents and energies of the members are involved, organized and directed into service for the benefit of children. A committee can be one of the most productive tools a PTA unit/council has to work with.

Standing Committees perform a continuing function necessary for the ongoing operation of the unit or council. They operate indefinitely and are usually provided for in the standing rules.

Ad Hoc Committees or Task Forces are generally formed to accomplish a specific objective. Their existence stems from a new or current concern or project the unit/council is facing. When the problem is resolved, the information gathered, or the project completed, the ad hoc committee or task force will disband.

Effective Meetings

Planning Meetings

- Why?** What is the purpose of the meeting? Information sharing skill training, to generate action?
- Who?** Who is the meeting aimed at? Open to anyone who comes or specific individuals/groups?
- How?** How will you let them know of the meeting? Con-

flicting dates, timely notice of meeting.

- When?** What date should it be held? Which day of the week, or part of the month, morning, afternoon, evening?
- Where?** What facilities are available? Consider the size of group, format to be used and costs
- Which?** Which methods will be used? Speaker, panel, film, or small group warm-up exercises to meet each other?
- What?** What resource materials will be needed? Develop your own/use other sources.

Before the meeting

After reviewing the previous meeting's minutes, prepare an agenda in advance, noting a starting and ending time. Be specific about topics and decisions to be made.

Contact everyone who has a report to give and make sure that materials and arrangements are complete for each item on the agenda.

During the meeting

- Start on time.
- Quickly review the agenda, adding items if necessary.
- Stay on the agenda.
- Summarize as the discussion progresses.
- Give everyone a chance to participate.
- At the end of the meeting, restate the decisions reached and the assignments made.

After the meeting

- See that minutes are sent out promptly.
- Follow up on decisions that were made.

Executive Session

From time to time there may be issues that, if discussed in an open board meeting, would harm the PTA, an individual member, or even a child. One example would be a discussion about seeking bids from businesses to provide a service, where a public discussion could give some businesses an unfair advantage or result in higher bids (and thus less revenue to the PTA). Another example would be if there are questions about the conduct of an individual PTA member or leader, where there is a risk that untrue allegations would be raised and circulated in the community to the detriment of that individual and his or her family.

When such issues arise, the Board may convene in Executive Session, which means that only Board members and any person that the Board determines is necessary for a full discussion of the issue are allowed to listen to or participate in the discussion. For example, if there were an issue about how the Association's funds had been handled, the Board might choose to include the financial review committee in the Executive Session even if some or all of the committee were not Board members. While the Secretary keeps minutes of any action taken in Executive Session, those minutes should be kept confidential and separate from the minutes for the rest of the meeting. All Board members and others present should be reminded that anything said in Executive Session should be kept strictly confidential.



Meeting Agenda Tips

Call to order:

The president stands, raps the gavel once and calls the meeting to order: "The meeting will please come to order."

Opening ceremonies: (optional)

Pledge of Allegiance, flag ceremony, poem, song or inspirational message.

Reading and approval of minutes:

"The secretary will read the minutes of the previous meeting." Secretary stands, addresses the president and reads the minutes, unless they have been posted, distributed or audited by an appointed committee. "Are there any corrections?" "The minutes stand approved," or "The minutes stand approved as corrected."

Report of the treasurer:

No motion is needed for adoption unless it is the report of the completed financial review. "We will have the treasurer's report." "Are there any questions?" "The report will be filed for financial review."

Letters or communications:

Communications are read by the secretary, and are acted on as they are read if action is required. "Are there any questions?"

Report of board of directors:

A summary report (not the minutes) is read for the information of the members. Recommendations should be voted upon one at a time, the secretary moving the adoption of each one. "We will hear the report of the board of directors by the secretary." "You have heard the recommendation. Is there discussion?" Follow the steps of a motion.

Reports of standing committees:

Before the meeting, the president consults with chairs and officers to find out which committees have reports to give. At the meeting, the president calls for committee's report (not chair's report). If the committee has made a recommendation, the person making the report moves its adoption. (No second is required since the motion is made on behalf of the committee.) The chair calls for discussion and/or follows steps of a motion. "We will hear the report of the committee given by _____, chair (or other title)." "Are there any questions regarding the report? If none, the report will be filed."

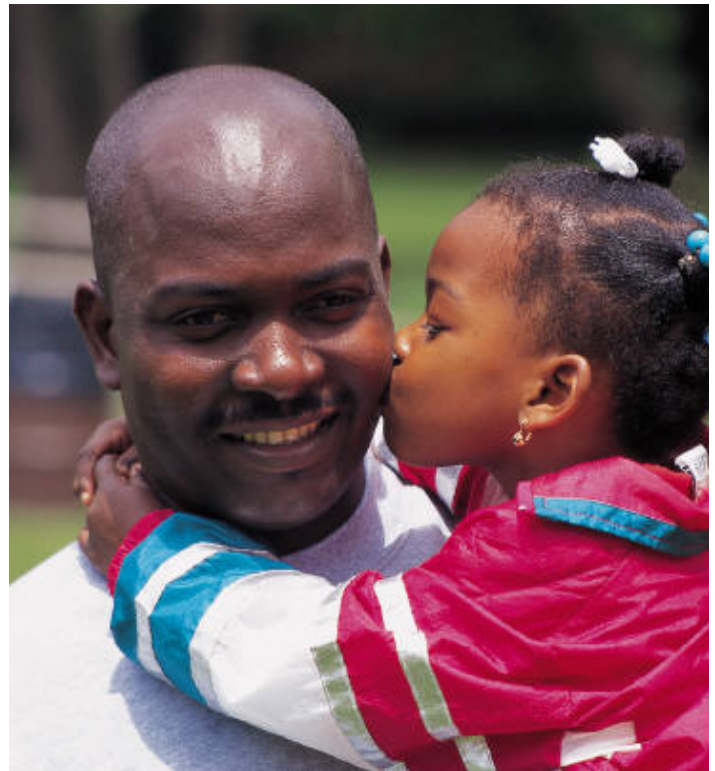
Reports of special committees:

This can be a progress report or a final report. Upon completion of its specified duties, the committee ceases to exist.

Handle reporting in the same manner as standing committees.

Additional reports:

These could be reports from staff, students, principal, senior citizen or other special volunteer.



Unfinished business:

Minutes of the previous meeting will indicate any unfinished business. Note that unfinished business is not called "old" business.

New business:

The chair or members may bring new business before the association. A motion is necessary before discussion and vote.

Program (a program is not required at every meeting):

The president introduces the program chair, who presents the program. The meeting is not "turned over" to the program chair, nor does the program chair "turn the meeting back" to the president. "The program will be presented by _____, program chair." "Mister/Madam President, this concludes the program."

Announcements:

Date of the next meeting and important activities should be announced. If there is a social time following the meeting, this should be announced. "Are there any announcements?"

Adjournment:

No motion is necessary to adjourn. Rap the gavel once. "Is there any further business to come before the meeting?" "The meeting is adjourned."

Conflict of Interest

What is a Conflict of Interest?

A conflict of interest exists whenever it is possible for a director to derive a benefit, either direct or indirect, because of his or her position on the board. The conflict may arise from a personal,

professional, or family interest. For example, a director who runs a catering business may benefit professionally if the PTA contracts with the director's catering firm. The mere existence of a conflict does not require the board to forego an opportunity advantageous to the PTA. It only requires that the disinterested directors make an informed decision whether the organization should proceed notwithstanding the potential benefit to be derived by an individual director, if it is otherwise in the best interests of the organization to do so.

Sample Conflict of Interest Statement

Any officer at _____ PTA must disclose in a written statement any conflict of interest regarding PTA business, then remove him or herself from the room during any deliberations and voting regarding this matter. This abstention should also be recorded in the minutes of the board meeting/membership meeting at which deliberations and voting took place.

Online Resources

WSPTA Leadership Resources webpage:
www.wastatepta.org/leaders/leaders.htm

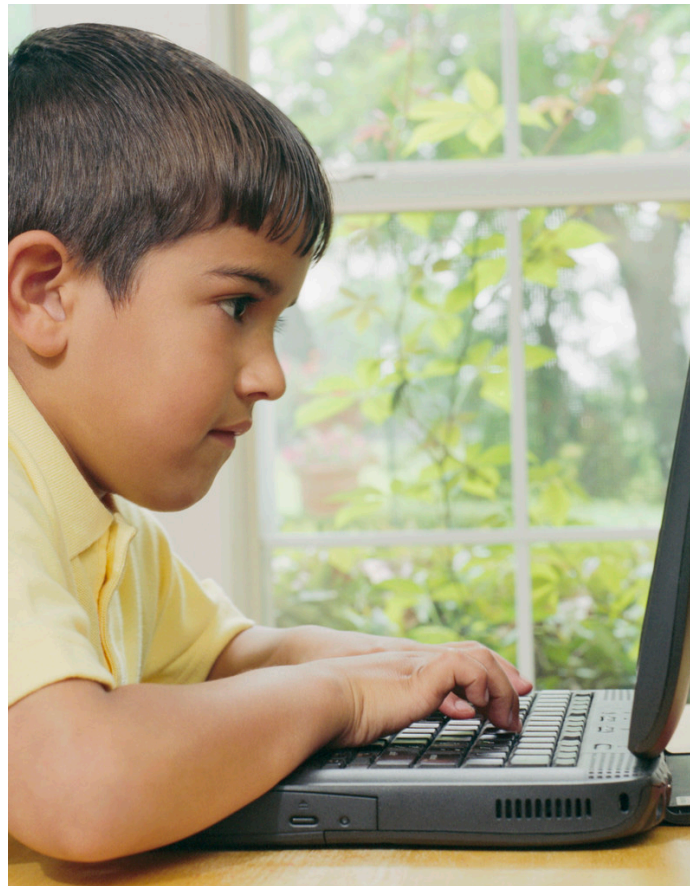
In the "Members Only" section of the Washington State PTA website you will find resources available exclusively to PTA members. This page contains PTA & the Law Resources, Leadership Packet materials, Money Matters, and a variety of resources for PTA officers and members. To access the members only site before October 1, 2011, use logon: PTAMember and password: leader. After October 1, 2011, the user name and password will be the same as the one on the back of your National PTA Membership Card. If you have any questions, email support@wastatepta.org or call the State PTA office at 1-800-562-3804.

Some of the items that can be downloaded from the page:

- 2011-2012 Leadership Packet
- WSPTA Uniform Bylaws
- Award forms
- Sample Conflict of Interest policy
- Election procedures (sample wording)
- PTA & the Law class handouts
- IRS filing instructions
- Suggested standing rules
- Email communications resources
- Online enrollment instructions
- Installation Ceremony (sample wording)
- PTA & School Administrator tips
- and much more....

Nominating Committee

For information on selecting a Nominating Committee and the duties and responsibilities of the Nominating Committee, see the Nominating Committee section of the WSPTA Leadership Packet.



Transitions

A positive step in sharing leadership information and materials should begin as soon as the new officers are elected. Use the following guidelines to ensure a smooth transition for all outgoing and incoming officers.

Incoming President & Vice President

Set dates to meet with new officers to:

- Set goals and plan calendar.
- Sign conflict of interest policy statement.
- Update committee job descriptions and appoint chairs.
- Formulate recommendations for changes to standing rules.
- Set planning meeting with principal/staff.

Check with the Treasurer to see that:

- the names on the bank signature cards have been changed.
- the financial review has been completed and the books accepted, and whether the recommendations from the financial review have been or are being implemented.

Check with the Secretary to see that:

- the permanent record file has been reviewed and updated.

Other things to remember:

- Encourage all incoming officers to attend the Region Leadership Conferences in the fall.
- Remember the team concept and give each new officer and chair a share of your enthusiasm and positive attitude about PTA leadership.

Outgoing President & Vice President

- Send “thank yous” to PTA volunteers and/or plan a volunteer appreciation activity.
- Inform members of PTA’s accomplishments during the year.
- Plan an installation of the new officers.
- Give each new officer and chair a share of your enthusiasm and positive attitude about PTA leadership.
- Pass on all PTA materials and publications to the incoming officers (Leadership Packet, Bylaws, Money Matters, etc.)
- Encourage new officers to attend the State PTA Convention.
- Update the “Legal Documents Notebook.” Confirm that IRS and Secretary of State paperwork was completed.
- Enroll the incoming officers via the WSPTA online membership enrollment program, and don’t forget to notify your region director and council president of the names and contact information of the new officers.
- Ask all chairs to return their updated procedure notebooks and final reports, along with an evaluation.
- Invite new officers and appointed chairs to a get-together with outgoing leaders (include the principal) to “brief” them, exchange information and records, and for an evaluation of the year and goal setting for the future. Give an overview of responsibilities. Make sure new officers have copies of the adopted budget and approved standing rules.
- Take incoming officers to council/region meetings/workshops.

Check with the treasurer to see that:

- The books and records have been updated and presented to the financial review committee.
- The books have been reviewed.
- Membership records have been passed on and all fees have been paid and sent to the State PTA office or council.
- A deadline for the receipt of all outstanding bills has been set.
- The budget has been developed and scheduled for approval by the members.
- Names are changed on signature card at the bank after financial review is completed.

Check with the secretary to see that:

- All minutes are updated, completed, and distributed to the new secretary, incoming officers and newly-appointed chairs.
- Verify that the financial review committee has completed the financial review by June 30.
- If the committee was not appointed at the beginning of the year, appoint the committee now.

Conflict Management

Tips for Effective Conflict Resolution

Adapted from NPTA leadership materials (July 2003).

The difference between good conflict and destructive conflict is the management of that conflict.

Conflict is often defined as a situation in which there are

opposing viewpoints or direct competition among participants. Conflict is a fact of life. It is unavoidable. PTAs often experience conflict because the diverse membership brings to the association personality differences, divergent viewpoints and varied backgrounds.

Not all conflict is bad. There can be no change without conflict. Conflict is a stimulus that produces creativity. Good conflict can stimulate thinking, open discussion, develop communication skills and eventually produce a decision.

Effective conflict resolution is the result of good management techniques used by a perceptive leader who understands the people and the group climate in which he/she works. A good leader will recognize that he/she has certain responsibilities in managing conflict.

These responsibilities include:

- Listening
- Restating what you think you heard
- Expressing emotions honestly
- Avoiding personal conflicts
- Developing reconciliation skills
- When the conflict is over, it is time to resume regular activities, and the leader must bring the group back together as a team.

Throughout the conflict situation, a good leader will:

- Preserve the dignity and self-respect of all involved. A good leader will keep the group focused on the issues, not personalities.
- Listen with neutrality and try to see the situation from every perspective.
- Accept the fact that other behavioral styles cannot be changed.
- Allow individuals to express their independent points of view. Once all views have been shared, the leader must help the group come to a consensus on a decision.
- Relax. By maintaining his/her cool, the leader can set a positive climate in which reasonable decisions can be made.



National PTA has a new e-learning initiative to provide training and education to every PTA member. One topic covered is Conflict Resolution. Go to www.pta.org/e_learning.asp for more information.

Problem Solving Tips

Conflict in PTAs usually revolves around three areas:

- Individual conflicts.
- Problems relating to association activities.
- Outside groups in opposition to PTA policies/positions.

Common PTA Problems

Some of the most common issues include:

- PTA versus other parent groups.
- PTA involvement in school issues.
- Improper accounting of funds.
- Nominating and election procedures.
- Personality clashes.

These concerns, as well as most conflicts in local unit can be avoided if the leadership takes the following steps:

- Be knowledgeable about PTA, its objects, programs, legislative policies and organization.
- Be familiar with the bylaws and standing rules. Have copies distributed to board members and available to any member who wishes to have a copy.
- Follow the nonpartisan, noncommercial, and nonsectarian policies.
- Be informed about the issues.
- Do not violate the rights of members. Allow ample time in meetings for discussion of the issues. Encourage speaking and voting.
- Do not let personality clashes interfere with the work of the PTA. Leaders must develop skills to work with all types of people. Respect the opinions of others.
- Cooperate and communicate with the principal and other school administrators.



Six Steps to Problem Solving

The six-step process is an effective method to work through difficult situations.

- 1. Identify the Problem.** Mention actual people, places, and things in clear statements. Each problem should describe two things: what the situation is now, and the target—ideal situation—that is not being reached.
- 2. Brainstorm for Solutions.** Ask the group to think of several alternatives for resolving the problem. Quantity—not quality—counts here. No ideas are discarded. All ideas are welcome.
- 3. Select the most promising alternatives** (usually three to five) by discussion and consensus.
- 4. Set priorities and design an action plan.** Decide by consensus which conclusion should be first, second, etc. Base the priority ranking on facts, resources available to carry out the action, urgency of the problem addressed and attainability of the solution. The action plan should contain a clear description of the action to be taken, specific dates for each action to occur, and the assignment of group or person to carry out action.
- 5. Carry out action plan.** Do not delay. A problem calls for immediate attention.
- 6. Evaluate actions.** Establish criteria for gauging how well the plan is working. Continual review of progress is critical. A final report to the group should be in writing.

Always refer to the WSPTA Bylaws when selecting the nominating committee, holding an election, conducting a financial review, etc. Consulting the bylaws can assure proper procedures and help the PTA avoid conflict situations.

Chairing a Tough Meeting

There are times when a PTA is faced with issues that ignite strong feelings from its membership and community. Conducting a meeting involving these issues can be extremely tough for the local PTA leadership.

Here are some tips for dealing with a potentially explosive meeting:

Before the Meeting

- Sit down with appropriate officers and pre-plan the meeting to allow maximum participation from all points of view.
- Check PTA sources for existing positions on issues to be discussed.
- Prepare an agenda for the meeting.
- Carefully study Robert's Rules of Order on meeting procedures, motions, etc.

During the Meeting

- Have a copy of the WSPTA Bylaws and Robert's Rules of Order Newly Revised on hand.

- Establish ground rules. Conduct the meeting as formally as possible.
- If the group is willing, special rules for this meeting can be agreed upon at the outset, such as numbers of times a person may speak to any one item, time limits for all speakers, etc.
- As the chair, you have the privilege to overlook the recognition of a speaker who may be dominating the floor in favor of others who may not have spoken.
- Should the group continue to disagree in such a way that a committee study is warranted, the chair should not hesitate to solicit a motion to charge a committee. Those who have expressed strong feeling on the issue should be given the responsibility of justifying those feelings by being part of the study group.
- Check your standing rules for any limitations or obligations concerning the unit's activity.
- Appear calm even if you are distressed.
- Be polite but forceful.
- Whatever happens, keep your perspective by maintaining neutrality as a chair. Keep your sense of humor.



Dealing With Difficult People

Difficult people can be found in any PTA group. They come in all shapes and sizes, but they can be identified by the strategies that they use to sabotage the group's efforts. A calm and self-controlled leader, who has practiced group management techniques, can provide a climate in which all members can effectively contribute.

Here are a few types of difficult people and suggested strategies to cope with them:

The Blocker — Says NO to everything and everyone. Attempts to bring back an issue or task after it has been rejected or bypassed.

Suggested strategies:

- “Why do you feel this way?”
- “Give us your background on that opinion.”
- “Where did you get that information?”

The Attacker — Is negative to people and projects. Expresses disapproval of the values, acts and feelings of others. Attempts to keep others from being credited with any contributions.

Suggested strategies:

- “Let's look at both sides.”
- “Where did you get your data for that opinion?”
- “Could we discuss the idea, and leave personalities out?”

The Clown — Refuses to take anything seriously; makes jokes about everything. Displays a lack of involvement in the group's efforts by being cynical, nonchalant, or playfully disruptive.

Suggested strategies:

- “How does that relate to the subject?”
- “We needed a good laugh; now let's get back to the topic.”
- “Would that help us deal with this problem?”

The Recognition Seeker — Wants to be heard and feel important. Boasts and demands to be in charge of committees or assignments.

Suggested strategies:

- “Could we hear more?”
- “Give us specific information, please.”
- “Could you look into that and give us more information at the next meeting?”

The Avoider — Leaves or withdraws from the meeting, ignores discussion, keeps quiet.

Suggested strategies:

- “We need a decision.”
- “We really want your input on this issue.”
- “What can you personally do to contribute?”

The Special Interest Pleader — Emphasizes “my child” or “those poor children.” Diverts attention from the goals and focus of the group effort.

Suggested strategies:

- “How does this work for the group?”
- “If we did this, how would it affect our group's goals?”
- “Is this our only choice?”

The Dominator — Asserts power or superiority to manipulate the group. Insists on “my” way; does all the talking. Bullies and bosses others in an autocratic manner,

Suggested strategies:

- “Are there other suggestions?”
- “Would this work in all cases?”
- “While we're on this point, let's hear from someone else.”

Sample PTA Survey

Your input is very important to the _____ Sample PTA. The PTA will be developing a program for next year and we hope you will help us. Please take a few minutes and fill out this brief survey. Every response will be considered. Return the completed form to the PTA. Thank you for helping us in developing a program that will be fun and beneficial to our students, school and the community.

Please check off which events you or your family participated in during this year:

- | | | | | |
|--|--|--|--|-------------------------------------|
| <input type="checkbox"/> Carnival | <input type="checkbox"/> Book Fair | <input type="checkbox"/> School Clothing | <input type="checkbox"/> School Picture | <input type="checkbox"/> Santa Shop |
| <input type="checkbox"/> Reading Program | <input type="checkbox"/> Parenting Workshops | <input type="checkbox"/> Emergency Kits | <input type="checkbox"/> After School Enrichment | <input type="checkbox"/> Assemblies |
| <input type="checkbox"/> Field Trips | <input type="checkbox"/> Reflections | <input type="checkbox"/> Family Fun Nights | <input type="checkbox"/> Candy/Gift Wrap Fund Raiser | |

Please check which events you feel we should include next year:

- | | | | | |
|--|--|--|--|-------------------------------------|
| <input type="checkbox"/> Carnival | <input type="checkbox"/> Book Fair | <input type="checkbox"/> School Clothing | <input type="checkbox"/> School Picture | <input type="checkbox"/> Santa Shop |
| <input type="checkbox"/> Reading Program | <input type="checkbox"/> Parenting Workshops | <input type="checkbox"/> Emergency Kits | <input type="checkbox"/> After School Enrichment | <input type="checkbox"/> Assemblies |
| <input type="checkbox"/> Field Trips | <input type="checkbox"/> Reflections | <input type="checkbox"/> Family Fun Nights | <input type="checkbox"/> Candy/Gift Wrap Fund Raiser | |

Is there a project, program or service activity that you feel we should consider?

If so, please describe it: _____

If this project, program or service activity is included in the program, are you willing to serve on the committee for it?

- Yes No

Name _____

Student(s) Name(s) _____

Student(s) Teacher(s) _____

Again, thank you for your valuable input. As a thank you for returning the completed form, a free bag of popcorn will be available for your student(s) on the next popcorn day.

Sample PTA Planning Form

If you have an idea for a project, program or service activity that you feel the _____ PTA should consider, please provide the following information. Return the completed form to any elected PTA officer for consideration. You will be notified if your project has been approved. Thank you for your idea and for helping us provide new and different events for our membership and the community we serve.

Name of project, program or service activity: _____ Is this activity a: Project Program Service

Name of person submitting this activity: _____ Phone number: _____

E-mail: _____

Describe the activity:

To be held: Fall Winter Spring Year Long

Other considerations _____

Please give specifics of this activity to the best of your ability.

Expected Income \$ _____

Expenses \$ _____

Resources Needed _____

Expenses will cover the purchase or rental of the following items: _____

Volunteers Needed _____

Building Usage _____

For office use only:

Date Form Received _____ Received By _____

Approved Denied Notified Submitter Date Notified _____

WSPTA Awards and Recognition Program

Award	Due Date	Where to Find Award Form
Individual Awards		
Golden Acorn	ongoing	www.wastatepta.org/resources/awards/index.html
Outstanding Educator	ongoing	www.wastatepta.org/resources/awards/index.html
Outstanding Advocate	ongoing	www.wastatepta.org/resources/awards/index.html
Honorary Life Membership	ongoing	www.wastatepta.org/resources/awards/index.html
Leadership Academy	3-1-2012	www.wastatepta.org/resources/awards/index.html
Outstanding Service Award (councils)	ongoing	www.wastatepta.org/leadership/awards/index.html
Student Awards		
PTA Men Essay Contest	3-1-2012	www.wastatepta.org/programs/PTA_mens/
Reflections	1-18-2012	www.wastatepta.org/programs/reflections/forms.html
Local Unit/Council Awards		
Communication Awards	3-1-2012	www.wastatepta.org/leadership/awards/index.html
Outstanding Newsletter	3-1-2012	www.wastatepta.org/leadership/awards/index.html
PTAs Taking Significant Action	3-1-2012	www.wastatepta.org/leadership/awards/index.html
Applegate Grant	11-1-2011	www.wastatepta.org/programs/applegate/index.html
Local Unit Standards of Excellence	3-1-2012	www.wastatepta.org/leadership/awards/index.html
Honor Unit	3-1-2012	www.wastatepta.org/leadership/awards/index.html
Outstanding Local Unit of the Year	3-1-2012	www.wastatepta.org/leadership/awards/index.html
Council Standards of Excellence	3-1-2012	www.wastatepta.org/leadership/awards/index.html
100% Membership Award	3-1-2012	www.wastatepta.org/leadership/awards/index.html
100% Teacher Membership Award	10-25-2011	www.wastatepta.org/leadership/awards/index.html

Other Forms & Information

Form	Where to Find Award Form
Local Unit Remittance Form	Membership pages, Leadership Packet
Membership Supplies Order Form	Membership pages, Leadership Packet
Restricted Donation Form	Money Matters pages, Leadership Packet
Sample PTA Survey Money	Money Matters pages, Leadership Packet
Sample PTA Planning Form	Money Matters pages, Leadership Packet
Budget Worksheet	Money Matters pages, Leadership Packet
Sample PTA Budget Money	Matters pages, Leadership Packet
Checklist/Financial Review	Money Matters pages, Leadership Packet
Best Practices Checklist	Leadership pages, Leadership Packet
Sample PTA Council Voting Delegate Form	Council pages, Leadership Packet
Council Remittance Form	Council pages, Leadership Packet
Council Unit Membership Fee Summary Form	Council pages, Leadership Packet
Outstanding Service Award (councils)	Council pages, Leadership Packet
Sample Form for Recommendations to the Nominating Committee	Nominating Committee pages, Leadership Packet
Sample Nominating Committee Report	Nominating Committee pages, Leadership Packet

Best Practices Checklist

Based on the WSPTA "Standards of Excellence" Award Criteria

- Our PTA is child-focused and responsive to our members.
 - Clearly defined goals have been established by our PTA and approved by the Board of Directors and/or membership.
 - Programs and activities were developed to address those goals.
 - Regular communication was provided to members concerning PTA issues and activities.
 - Our PTA determined our members' needs.
 - Our membership campaign is ongoing and welcomes all who seek to join and participate.
 - Meetings are held to address the needs of the membership and conduct the business of the association.
 - Our volunteers are recognized.
 - Our PTA identifies an outstanding volunteer in our community and honors him/her with a Golden Acorn Award annually.
 - Our PTA considers whether to honor one or more outstanding staff member(s) in our community by presenting an Outstanding Educator Award annually.
 - Our PTA identifies an outstanding child advocate in our community and honors him/her with an Outstanding Advocate Award annually.

- Our PTA practices fiscal and fiduciary responsibility.**
 - Our PTA's budget was approved by the membership.
 - A financial review was conducted of last year's books and records.
 - Monthly financial reports are made to the board of directors and general membership.
 - Our PTA's standing rules were updated and approved by the membership.
 - The Nominating Committee was elected by the membership.
 - Our PTA's officers were elected by the membership.
 - Our PTA purchased insurance.
 - Our PTA's board of directors held regular meetings.

- Our PTA leaders are knowledgeable, involved and well-trained.**
 - Our PTA leaders attended a Region Conference or received person-to person training from a service delivery team member.
 - Our PTA leaders attended PTA and the Law.
 - Our PTA leaders attended Legislative Assembly.
 - Our PTA leaders attended the last State PTA Convention.
 - Our PTA leaders will attend the next State PTA Convention.
 - Our PTA has a process to evaluate the current year's goals, programs, and activities.
 - Our PTA shares information received from State and National PTA with our members.
 - Our PTA has a process to pass materials and records on to next year's officers and committee chairs.
 - Our PTA networks with others:
 - Council PTAs: by regular attendance and participation at council meetings and events.
 - Non-Council PTAs: by working with other PTAs and similar volunteer and service organizations.