



WSPTA Local PTA and Council Awards of Excellence

STANDARDS OF EXCELLENCE - PTA

Application Instructions and Judging Form 2017-18

Award Outline

The Standards of Excellence award is a tool to encourage the use of the best practices of PTA management. If your PTA has not participated in awards, the Standards of Excellence is a great place to start. Participating in the Standards of Excellence award could be used as a reporting tool to your PTA members.

The purpose of the Local PTA and Council Awards of Excellence program is to celebrate the work PTAs and councils do to make a difference for their communities. Awards and programs also help build awareness of the WSPTA mission and focus. When local PTAs and councils are recognized for the work they are doing, it builds pride in the community and helps people connect with PTA!

Application Instructions

Use this application only. Do not alter.

- Please include only this Standards of Excellence - PTA application page with your submission. Subsequent judging form pages are to be used as a guide in creating your submission and do not need to be included.
- This application form is for local PTAs and community PTAs.
- PTAs must be in good standing with WSPTA in order to participate in the WSPTA Local PTA and Council Awards of Excellence.
- Submit application and requested pages in one two-pocket portfolio with fasteners or 3-ring binder (no larger than 2"). Platinum level applications may be submitted in any size 3-ring binder.
- Award time frame is from March 1, 2017 – February 28, 2018 unless otherwise noted. Do not include old examples.
- Examples should have dates whenever possible.
- Include items in ORDER requested and ONLY the number of items requested. Use SECTIONS as indicated on the judging form.
- Label top of ALL pages with specifics (i.e. September 2017 board of directors' minutes).
- Highlight the requested information on each page. Add narratives to pages if clarification is needed.
- If a flyer, newsletter, or e-blast is used as an example, please make sure the page is clearly dated.
- Make sure meeting minutes of more than one page have a header or footer listing the date and type of minutes (e.g. September 2017 membership meeting minutes).
- Partial credit may be awarded if deemed appropriate by the judging committee.
- Decisions of Standards of Excellence Committee and WSPTA Program Director are final.
- Awards will be presented at the 2018 WSPTA Convention.

PTA/PTSA Name:	<input type="text"/>	PTA#:	<input type="text"/>
Contact Name:	<input type="text"/>	Daytime Phone:	<input type="text"/>
Contact E-mail:	<input type="text"/>		

Membership numbers are only required for platinum level applications.

Current Year Paid Memberships (July 1, 2017 – February 28, 2018):	<input type="text"/>	Previous Year Paid Memberships (July 1, 2016 – Feb. 28, 2017):	<input type="text"/>
--	----------------------	---	----------------------

Mail Application To: **Attention: Standards of Excellence Chair**
 1304 South Fawcett Ave., #300, Tacoma, WA 98402
 ☎ 253-214-7410 ✉ PTAprgdir@wastatepta.org

Postmark Deadline: March 1, 2018

Please keep a copy for your records.

PTA/PTSA Name: PTA#:

Standards of Excellence – Local/Community PTA Judging Form 2017-18

Section 1: Our PTA is child-focused and responsive to its membership. (Total Points Available = 46)

A. Annual goals have been established by our PTA and approved by our board of directors and/or membership. (Total points available = 4)

1. Attach: Copy of goals – 2 points	
2. Attach: Minutes from membership or board of directors meeting showing approval of goals – 2 points	

Total Points Awarded:	<input type="text"/>
-----------------------	----------------------

B. Programs, events, and committees were designed to address our goals. Please provide examples addressing different goals. If examples address the same goal, credit will not be given for both. (Total points available = 6)

1. Attach: Program/event/committee example #1 <u>and</u> list which goal it addresses from section A1 – 2 points	
2. Attach: Program/event/committee example #2 <u>and</u> list which goal it addresses from section A1 – 2 points	
3. Attach: Program/Event/committee example #3 <u>and</u> list which goal it addresses from section A1 – 2 points	

Total Points Awarded:	<input type="text"/>
-----------------------	----------------------

C. Regular communication was provided to members concerning **PTA** issues and activities (local, council, region, WSPTA and National PTA issues). How does your PTA communicate? Examples must show **regular** communication (i.e. newsletters or e-blasts are usually done at least monthly and would be considered “regular”), so methods such as Facebook must show “posts” from three different months. (Total points available = 4)

Credit will not be given for multiple examples of the same method of communication.

1. Attach: Method of communication example – 2 points	
2. Attach: Method of communication example – 2 points	

Total Points Awarded:	<input type="text"/>
-----------------------	----------------------

D. Our PTA determined our members’ needs. Member needs can include families, staff, students, and PTA committee chairs/leaders. Examples must be different methods (e.g. credit will not be given for two surveys, even if one is online and one is paper, **unless** they target specific groups such as one survey for families and completely different survey for staff, and the targeted group must be obvious in the survey). (Total points available = 6)

1. Attach: Method of determining members’ needs example #1 – 2 points	
2. Attach: Method of determining members’ needs example #2 – 2 points	
3. Attach: After determining members’ needs, our PTA used the information to improve or change our programs and activities. Include example or narrative on changes made – 2 points	

Total Points Awarded:	<input type="text"/>
-----------------------	----------------------

E. Our membership campaign is ongoing and welcomes all who wish to join and participate. Examples must be different – credit will not be given for the same basic example with a different date on it. (Total points available = 6)

1. Attach: Dated Fall 2017-18 (approx. August-October) membership campaign example – 2 points	
2. Attach: Dated Winter 2017-18 (approx. November-December) membership campaign example – 2 points	
3. Attach: Dated Spring 2017-18 (approx. January-February) membership campaign example – 2 points	

Total Points Awarded:	<input type="text"/>
-----------------------	----------------------

F. Our PTA is child focused and advocates for children. Examples can include ways your PTA informs your members about or takes action to address the needs of children in your local community, district, region, state, or nation. (Total points available = 6)

Credit will not be given for multiple examples of the same method of advocacy.

1. Attach: Example of members advocating for or addressing the needs of children example #1 – 2 points	
2. Attach: Example of members advocating for or addressing the needs of children example #2 – 2 points	
3. Attach: Example of members advocating for or addressing the needs of children example #3 – 2 points	

Total Points Awarded:	<input type="text"/>
-----------------------	----------------------

G. Meetings are held to address the needs of the membership and to conduct the business of the association. Mark examples with notification method and month publicized (e.g. Website-September 2017). (Total points available = 4)

1. Attach: Membership notification of complete list of membership meeting dates – 2 points	
2. Attach: Membership notification of complete list of board of directors' meeting dates – 2 points	

Total Points Awarded:

H. Our volunteers are recognized by name. Examples should be dated if possible. (Total points available = 4)

Credit will not be given for multiple examples of the same method of recognition.

1. Attach: Volunteer appreciation example #1 – 2 points	
2. Attach: Volunteer appreciation example #2 – 2 points	

Total Points Awarded:

I. Our PTA regularly offers the following awards (Golden Acorn, Honorary Lifetime Membership, Outstanding Advocate, Outstanding Educator, and Outstanding Student Advocate awards may receive credit). (Total points available = 6) **Attach documentation showing awards offered in fiscal year 2016-17.**

1. 0 awards offered = 0 points / 1-2 awards offered = 2 points / 3 or more awards offered = 4 points (Points will only be awarded for the highest attained - maximum of 4 points)	
2. Attach: Newsletter/other media/flyer/minutes showing award recognition from current or previous year – 2 points	

Total Points Awarded:

TOTAL SECTION 1 POINTS:	Total Points Available = 46	Total Points Awarded <input style="width: 50px;" type="text"/>
--------------------------------	------------------------------------	---

Section 2: Our PTA practices fiscal & fiduciary responsibility. (Total Points Available = 36)

A. Our PTA's budget was approved by the membership. (Total points available = 4)

1. Attach: Copy of 2017-18 budget – 2 points	
2. Attach: Copy of membership meeting minutes showing approval of budget by membership – 2 points	

Total Points Awarded:

B. A year-end financial review was conducted of last year's books and records. (Total points available = 4)

1. Attach: Copy of last year's (fiscal 2016-17) year-end financial review – 2 points	
2. Attach: Copy of membership meeting minutes showing year-end financial review results were discussed with membership – 2 points	

Total Points Awarded:

C. Monthly financial reports were made to the board of directors and/or membership. (Total points available =8)

1. Attach: Current fiscal year monthly financial reports (July – January) – 1 point each up to maximum of 7 points	
2. Attach: 2016-17 year-end financial report (this is different than the June 2017 monthly report) – 1 point	

Total Points Awarded:

D. Our PTA's standing rules were updated and approved by the membership. (Total points available = 4)

1. Attach: Copy of 2017-18 standing rules – 2 points	
2. Attach: Copy of membership meeting minutes showing approval of standing rules – 2 points	

Total Points Awarded:

E. The nominating committee was elected by the membership in accordance with *WSPTA Uniform Bylaws*. (Total points available = 2)

1. Attach: Copy of membership meeting minutes showing election of nominating committee – 2 points	
---	--

Total Points Awarded:

F. Our PTA's officers were elected by the membership in accordance with *WSPTA Uniform Bylaws*. (Total points available = 4)

1. Attach: Copy of signed and dated nominating committee report – 2 points	
2. Attach: Copy of membership meeting minutes showing election of officers - 2 points	

Total Points Awarded:

G. Our PTA purchased insurance. (Total points available = 2)

1. Attach: Copy of current fiscal year insurance certificate – 2 points	
---	--

Total Points Awarded:

H. Our PTA meets the following requirements from the IRS, State of Washington, and WSPTA. (Total points available = 8)

1. Attach: Copy of fiscal year 2016-17 tax filing (or acceptance letter) (990, 990EZ, or 990N form) – 2 points	
2. Attach: Copy of fiscal year 2016-17 charitable solicitations renewal (or acceptance letter) or year-end financials showing last year's total income from all sources was less than \$50,000 (with total income highlighted) if no charitable solicitations was required – 2 points	
3. Attach: Copy of annual corporate renewal. Include current fiscal year if your incorporation date is between July 1 – February 28. Include previous fiscal year if your incorporation date is between March 1 – June 30. – 2 points	
4. Attach: Completed Standards of Affiliation (SOA) checklist – 2 points	

Total Points Awarded:

TOTAL SECTION 2 POINTS:	Total Points Available = 36	Total Points Awarded <input style="width: 50px;" type="text"/>
--------------------------------	------------------------------------	---

Section 3: Our PTA leaders are knowledgeable, involved and well trained. (Total Points Available = 29)

A. Having trained and informed officers is part of being a successful PTA. Please **complete and attach** the Training Tracking Spreadsheet (found on the WSPTA website) to indicate who attended training, what they attended and when. Certification from region director (letter or email) will also be accepted. (Total points available = 14)

THIS CHART SHOWS THE MAXIMUM POINTS FOR TRAINING ATTENDANCE

1 point = 1 person attending a training

Attendance is subject to verification by WSPTA prior to awards.

WSPTA Approved Training	Maximum Points (1 point per attendee)
WSPTA Convention (April 2017)	4
PTA and the Law	4
Region conferences	6
WSPTA-approved region training	
WSPTA-approved council training	
Leadership Conference (August 2017)	
WSPTA-approved webinar	
Pre-approved National PTA e-learning	
Other WSPTA event where training is provided	
MAXIMUM TRAINING POINTS AVAILABLE	14

Total Points Awarded:

B. WSPTA Legislative Assembly for 2017. (Total points available = 3)

1. Attach: Copy of Legislative Assembly registration for each attendee or certification from region director (letter or email) – 1 point each up to maximum 3 points	
--	--

Total Points Awarded:

C. WSPTA Convention for 2018. (Total points available = 2)

1. Our PTA plans to send members to the 2018 WSPTA Convention (attach budget with line item highlighted) - 2 points	
--	--

Total Points Awarded:

D. Our PTA shares the information from council/region/WSPTA/National PTA with our membership. **At least one example from each of the following must be provided: your region (e.g. region director updates, region legislative/programs/membership/family and community engagement updates, etc. Regions are different than councils – your region is the first digit of your PTA#.), WSPTA, and National PTA.** (Total points available = 8)

1. Attach: PTA region information shared example #1 – 2 points	
2. Attach: PTA WSPTA information shared example #2 – 2 points	
3. Attach: PTA National PTA information shared example #3 – 2 points	
4. Attach: PTA (any level) information shared example #4 – 2 points	

Total Points Awarded:

E. Our PTA networks with others. (Total points available = 2)

1. Attach: Documentation from council secretary indicating council meetings attended (attendance at 2 or more meetings required) – 2 points	
---	--

OR

1. Attach: Example of working with other PTAs or similar organizations (e.g. joint events, roundtables, sharing resources, etc.) (one example required) – 2 points	
--	--

Total Points Awarded:

TOTAL SECTION 3 POINTS:	Total Points Available = 29	Total Points Awarded <input style="width: 50px;" type="text"/>
--------------------------------	------------------------------------	---

Section 4: Subjective scoring (Total Points Available = 10)
--

1. Organization of application packet – subjective up to 5 points	
2. Presentation of items in application packet – subjective up to 5 points	

Total Points Awarded:

TOTAL SECTION 4 POINTS:	Total Points Available = 10	Total Points Awarded <input style="width: 50px;" type="text"/>
--------------------------------	------------------------------------	---

Total Points Earned

Section 1: (Maximum points allowed = 46) _____

Section 2: (Maximum points allowed = 36) _____

Section 3: (Maximum points allowed = 29) _____

Section 4: (Maximum points allowed = 10) _____

Total Points: (Maximum points allowed = 121) _____

Gold Level (90%) = 108+ Silver Level (80%) 96-109 Bronze Level (70%) 84-97

Do you want to apply for the Platinum Level of Standards of Excellence?

Your PTA/PTSA must have achieved **Gold Level** status for Standards of Excellence to be considered for the Platinum Level. The **Platinum Standards of Excellence** recognizes PTAs that have gone significantly beyond the attainment of excellence and have demonstrated exceptional qualities that merit replication by others.

Continue to the next page!

Platinum Standards of Excellence – Local/Community PTA Judging Form 2017-18

Your PTA/PTSA must have achieved **Gold Level** status for Standards of Excellence to be considered for the Platinum Level. Examples provided must be in addition to what was previously provided in this application.

Section 5: PLATINUM LEVEL REQUIREMENTS! (Total Points Available = 112)

A. Clearly defined and measurable SMART goals have been established by our PTA. Goals are evaluated throughout the year. (Total points available = 6)

1. Attach: Describe process for developing goals. (Why were these goals chosen?) – 2 points	
2. Goals are measurable and clearly defined. (You can tell if each goal was accomplished.) – 2 points	
3. Attach: Description of goal evaluation. (Describe the process for evaluating progress toward meeting goals and how you will know when they are met. When and how often do you evaluate? Who evaluates? Do you share the evaluation with your membership?) – 2 points	

Total Points Awarded:

B. Programs, events, and committees were designed to address our goals. Using the programs/events/committees submitted in section 1B, please provide program evaluations. (Total points available = 6)

1. Attach: Program/event/committee evaluation (describe how program/event/committee is/is not meeting goal) example #1 – 2 points	
2. Attach: Program/event/committee evaluation (describe how program/event/committee is/is not meeting goal) example #2 – 2 points	
3. Attach: Program/event/committee evaluation (describe how program/event/committee is/is not meeting goal) example #3 – 2 points	

Total Points Awarded:

C. Regular communication was provided to members concerning **PTA** issues and activities (local, council, region, WSPTA and National PTA issues). How does your PTA communicate? Examples must show **regular** communication (i.e. newsletters or email blasts are usually done at least monthly and would be considered “regular”), so methods such as Facebook must show “posts” from three different months. (Total points available = 6)

These examples are in addition to what was already provided (do not duplicate examples provided in section 1C).

Credit will not be given for multiple examples of the same method of communication.

1. Attach: Method of communication example #1 – 2 points	
2. Attach: Method of communication example #2 – 2 points	
3. Attach: Method of communication example #3 – 2 points	

Total Points Awarded:

D. Our PTA determined our members’ needs. Member needs can include families, staff, students, and PTA committee chairs/leaders. Examples must be different methods (e.g. credit will not be given for two surveys, even if one is online and one is paper, **unless** they target specific groups such as one survey for families and completely different survey for staff, and the targeted group must be obvious in the survey). (Total points available = 6)

These examples are in addition to what was already provided (do not duplicate examples provided in section 1D).

Credit will not be given for multiple examples of the same method of determining needs.

1. Attach: Method of determining members’ needs example #1 – 2 points	
2. Attach: Method of determining members’ needs example #2 – 2 points	
3. Attach: Method of determining members’ needs example #3 – 2 points	

Total Points Awarded:

E. Our PTA is child focused and advocates for children. Examples can include ways your PTA informs your members about or takes action to address the needs of children in your local community, district, region, state, or nation. (Total points available = 4)

These examples are in addition to what was already provided (do not duplicate examples provided in section 1F).

Credit will not be given for multiple examples of the same method of advocacy.

1. Attach: Advocating for or addressing the needs of children example #1 – 2 points	
2. Attach: Advocating for or addressing the needs of children example #2 – 2 points	

Total Points Awarded:

F. Our membership campaign is ongoing, welcomes all who wish to join and participate, and is a priority at our PTA. (Total points available = 18)

1. Attach: Copy of 100% Teacher application – 2 points	
2. Attach: Copy of goals showing a membership-related goal (please highlight membership goal) – 2 points	
3. Attach: Copy of sharing PTA membership benefits with our membership example #1 – 2 points	
4. Attach: Copy of sharing PTA membership benefits with our membership example #2 – 2 points	

WSPTA will fill in membership information for your PTA to calculate any membership increase:

Current Year Paid Memberships (July 1, 2017 – February 28, 2018):	Previous Year Paid Memberships (July 1, 2016 – Feb. 28, 2017):	% Increase (if any):
5. Maintained last year’s membership – 2 points / 1-4% membership gain – 4 points / 5-9% membership gain – 5 points / 10-15% membership gain – 6 points / 16%+ membership gain – 8 points / 100% membership (your PTA must ATTACH a copy of your 100% membership application) – 10 points Points will only be awarded for the highest level of membership gain attained (0-10 points available)		

Total Points Awarded: _____

G. Our volunteers are recognized by name. Examples should be dated if possible. (Total points available = 6)
**These examples are in addition to what was already provided (do not duplicate examples provided in section 1H).
Credit will not be given for multiple examples of the same method of recognition.**

1. Attach: Volunteer appreciation example #1 – 2 points	
2. Attach: Volunteer appreciation example #2 – 2 points	
3. Attach: Volunteer appreciation example #3 – 2 points	

Total Points Awarded: _____

H. Family and community engagement. Our PTA reaches out to or addresses the needs of our diverse populations (this is not limited to race or culture). Diverse populations can include, but not be limited to, military families, families of differently-abled students, etc. (Total points available = 8)

1. Attach: An article, flyer, or other resource was promoted/provided in another language example #1 – 2 points	
2. Attach: An article, flyer, or other resource was promoted/provided in another language example #2 – 2 points	
3. Attach: Example or narrative of a program/event/committee/outreach to one of your diverse populations example #1 – 2 points	
4. Attach: Example or narrative of a program/event/committee/outreach to one of your diverse populations example #2 – 2 points	

Total Points Awarded: _____

I. A mid-year financial review was conducted of our books and records. (Total points available = 4)

1. Attach: Copy of last year’s (fiscal 2016-17) mid-year financial review – 2 points	
2. Attach: Copy of membership meeting minutes showing mid-year financial review results were discussed with membership – 2 points	

Total Points Awarded: _____

J. The following requirements from the IRS, State of Washington, and WSPTA were shared with the membership. (Total points available = 6)

1. Attach: Copy of membership meeting minutes showing fiscal year 2016-17 tax filing (or acceptance letter) was discussed with membership – 2 points	
2. Attach: Copy of membership meeting minutes showing annual corporate renewal was discussed with membership (Include current fiscal year if possible based on your incorporation date and membership meeting schedule, otherwise include previous fiscal year) – 2 points	
3. Attach: Copy of membership meeting minutes showing completed Standards of Affiliation (SOA) was discussed with membership – 2 points	

Total Points Awarded: _____

K. All elected officers for 2017-18 are trained. (Total points available = 2)

1. Attach: List of all elected officer names, positions, and WSPTA-approved training attended - 2 points	
--	--

Total Points Awarded: _____

L. Our PTA promotes and/or shares what we learned at WSPTA events and training opportunities with our committee chairs and/or membership. (Total points available = 6)

1. Attach: Example (minutes, newsletter, email blast, website, other) showing 2018 WSPTA Convention was reported to membership (can be in advance of the event to announce/encourage attendance or after the event to report back) - 2 points	
2. Attach: Example (minutes, newsletter, email blast, website, other) showing a 2017-18 region conference was reported to membership (can be in advance of the event to announce/encourage attendance or after the event to report back) – 2 points	
3. Attach: Example (minutes, newsletter, email blast, website, other) showing results of 2017 Legislative Assembly was reported back to membership. - 2 points	

Total Points Awarded:

M. Transition and Committee Chair/Board of Directors Training (Total points available = 8)

1. Attach: Description of elected officer transition plan – 2 points	
2. Attach: Our PTA held a board retreat/meeting/training/event for the incoming board of directors. Please attach the invite, the agenda, or meeting minutes – 2 points	
3. Attach: Description of committee chair/board of directors transition plan – 2 points	
4. Attach: Description of committee chair/board of directors training – 2 points	

Total Points Awarded:

N. Our PTA has active members that have leadership roles in council, region, state and/or the school district. (Total points available = 6)

An active member of your PTA is defined as a committee member, committee chair, board of directors, executive committee, etc. For example, the WSPTA president who joins your PTA is not considered an active member.

1. Attach: Documentation verifying active leadership role example #1 – 2 points	
2. Attach: Documentation verifying active leadership role example #2 – 2 points	
3. Attach: Documentation verifying active leadership role example #3 – 2 points	

Total Points Awarded:

O. Our PTA participated in the 2017-2018 Reflections Program. (Total points available = 6)

1. Attach: Copy of Reflections participation form – 2 points	
2. Attach: Copy of announcement of Reflections program – 2 points	
3. Attach: Example of Student Artist Recognition – 2 points	

Total Points Awarded:

P. Our PTA shares the information in National PTA’s “Our Children” (Total points available = 4)

1. Attach: How “Our Children” (National PTA’s magazine) is used example #1 – 2 points	
2. Attach: How “Our Children” (National PTA’s magazine) is used example #2 – 2 points	

Total Points Awarded:

Q. Our PTA makes use of WSPTA **and** National PTA programs and resources. This is different than Section 3, Tab G where you simply share the information with your membership. These are programs and resources your PTA uses or participates in. (Total points available = 10) ***At least one example from each association (WSPTA and National PTA) is required.***

1. Attach: PTA’s use of WSPTA and National PTA program example #1 – 2 points	
2. Attach: PTA’s use of WSPTA and National PTA program example #2 – 2 points	
3. Attach: PTA’s use of WSPTA and National PTA program example #3 – 2 points	
4. Attach: PTA’s use of WSPTA and National PTA program example #4 – 2 points	
5. Attach: PTA’s use of WSPTA and National PTA program example #5 – 2 points	

Total Points Awarded:

TOTAL SECTION 5 POINTS:	Total Points Available = 112	Total Points Awarded	<input style="width: 50px;" type="text"/>
--------------------------------	-------------------------------------	-----------------------------	---

Total Section 5 Points: (Maximum points allowed = 112) _____
Units scoring 85% of points (95 or higher) will be awarded the Platinum Level.