

## 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!

## Award Instructions & Information

### 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, 2018 – February 28, 2019 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 (for example, September 2018 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 (for example, September 2018 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 2019 WSPTA Convention.

PTA/PTSA Name:		PTA #:	
Contact Name:		Daytime Phone:	
Contact E-mail:			

Mail application to: **Attention: Standards of Excellence Chair**  
**1304 South Fawcett Ave., #300, Tacoma, WA 98402**

Award questions, contact: ✉ [ptaprogrid@wastatepta.org](mailto:ptaprogrid@wastatepta.org) ☎ 253-214-7410

**Postmark Deadline: March 1, 2019**

**Please keep a copy for your records.**

PTA/PTSA Name:

PTA #:

## Standards of Excellence – Local/Community PTA Judging Form 2018-19

### 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 director meeting showing approval of goals – 2 points	

Total Points Awarded:

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:

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

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 – 2 points	

Total Points Awarded:

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

(Total points available = 6)

1. Attach: <b>Dated</b> Fall 2018-19 (approx. Aug-Oct) membership campaign example – 2 points	
2. Attach: <b>Dated</b> Winter 2018-19 (approx. Nov-Dec) membership campaign example – 2 points	
3. Attach: <b>Dated</b> Spring 2018-19 (approx. Jan-Feb) membership campaign example – 2 points	

**Total Points Awarded:**

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:**

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 (for example, Website– September 2018). (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 a single 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 Life 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 2017-2018.**

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

**Total Points Awarded:**

<b>TOTAL SECTION 1 POINTS:</b>	<b>Total Points Available = 46</b>	<b>Total Points Awarded</b>	<input type="text"/>
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**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 2018-19 budget – 2 points	
2. Attach: Copy of Spring 2018 membership meeting minutes showing approval of budget by membership before the start of the new fiscal year – 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 2017-18) 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: 2017-18 year-end financial report (this is different than the June 2018 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 2018-19 standing rules – 2 points	
2. Attach: Copy of membership meeting minutes showing approval of these 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	
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**Total Points Awarded:**

F. Our PTA’s officers are 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	
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**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 2017-18 tax filing (or acceptance letter) (990, 990EZ, or 990N form) – 2 points	
2. Attach: Copy of fiscal year 2017-18 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:**

<b>TOTAL SECTION 2 POINTS:</b>	<b>Total Points Available = 36</b>	<b>Total Points Awarded</b>	<input type="text"/>
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**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 (May 2018)	4
PTA and the Law	4
Region conferences, WSPTA-approved region training, WSPTA-approved council training, Leadership Conference (August 2018), WSPTA-approved webinar, pre-approved National PTA e-learning, or other WSPTA event where training is provided	6
<b>MAXIMUM TRAINING POINTS AVAILABLE</b>	<b>14</b>

**Total Points Awarded:**

B. WSPTA Legislative Assembly for 2018. (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 3 points maximum	
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**Total Points Awarded:**

C. WSPTA Convention for 2019. (Total points available = 2)

1. Our PTA plans to send members to the 2019 WSPTA Convention ( <b>attach budget with line item highlighted</b> ) - 2 points	
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**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 <b>region</b> information shared example #1 – 2 points	
2. Attach: PTA <b>WSPTA</b> information shared example #2 – 2 points	
3. Attach: PTA <b>National PTA</b> information shared example #3 – 2 points	
4. Attach: PTA ( <b>any level</b> ) 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	
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**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	
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**Total Points Awarded:**

<b>TOTAL SECTION 3 POINTS:</b>	<b>Total Points Available = 29</b>	<b>Total Points Awarded</b>	<input style="width: 100%;" type="text"/>
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**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:**

<b>TOTAL SECTION 4 POINTS:</b>	<b>Total Points Available = 10</b>	<b>Total Points Awarded</b>	<input style="width: 100%;" type="text"/>
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**Total Points Earned**

Section 1: (Maximum points available = 46) \_\_\_\_\_

Section 2: (Maximum points available = 36) \_\_\_\_\_

Section 3: (Maximum points available = 29) \_\_\_\_\_

Section 4: (Maximum points available = 10) \_\_\_\_\_

**Total Points: (Maximum points available = 121) \_\_\_\_\_**

**Gold Level (90%) = 108+    Silver Level (80%) 96-107    Bronze Level (70%) 84-95**

**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 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? 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 and support 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% Staff 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, 2018– February 28, 2019):	2017 - 18 Paid Memberships (July 1, 2017 – Feb. 28, 2018):	% 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 <b>ATTACH</b> a copy of your 100% membership application) – 10 points <b>Points will only be awarded for the highest level of membership gain attained (0-10 points available)</b>		

**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 a single 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 and addresses the needs of our diverse populations (this is **not** limited to race or culture). Diverse populations can include, but are not 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 2017-18) 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 2017-18 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 2018-19 are trained. (Total points available = 2)

1. Attach: List of all elected officer names, positions, and WSPTA-approved training attended - 2 points	
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**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 <b>2019 WSPTA Convention</b> 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 <b>2018-19 region conference</b> 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 <b>2018 Legislative Assembly</b> 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	

<b>Total Points Awarded:</b>	
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O. Our PTA participated in the 2018-2019 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	

<b>Total Points Awarded:</b>	
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P. Our PTA shares the information in National PTA’s “Our Children”. (Total points available = 4)

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

<b>Total Points Awarded:</b>	
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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	

<b>Total Points Awarded:</b>	
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<b>TOTAL SECTION 5 POINTS:</b>	<b>Total Points Available = 112</b>	<b>Total Points Awarded</b>	
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**Total Section 5 Points: (Maximum points available = 112) \_\_\_\_\_**

**Units scoring 85% of points (95 or higher) will be awarded the Platinum Level.**