

Colorado PTA Local Unit Handbook



Providing you with roots to grow a successful PTA

Colorado
PTA[®]
everychild. onevoice.

TABLE OF CONTENTS

Welcome from Colorado PTA	1
<u>OUR ROOTS</u>	
My PTA Calendar	2
Why PTA?	3 - 4
PTA vs. Other Parent Organizations	5
<u>HUGS - Healthy Unit in Good Standing</u>	
Required documentation to be a Healthy Unit in Good Standing	6
Officers List and Overview of Committees	7
Membership Report Cover Submittal	8
Insurance	9
Bylaws	10
Nominating Committee/Elections	11-13
Financial Review/Audit Committee Report	14
General FAQs	15 -16
<u>ADVOCACY</u>	
The Legislative Committee	17
What is an Advocacy Liaison?	18
Resolutions	19
ELECTION DOS and DON'TS for PTAs	20
ESSA Every Student Succeeds Act	21 - 22
<u>NURTURING AND GROWING OUR MEMBERSHIP</u>	
Membership	23- 24
Membership FAQ	25
Business partners	26 - 27
Diversity	28
Male Involvement	29
Youth Involvement	30
Where do your dues go?	31
Membership benefits	31
100 reasons to join PTA	32 - 33
<u>BRANCHING OUT WITH PROGRAMS</u>	
Reflections	34
Health, Wellness, and Safety	35 - 36
School of Excellence	37
STEM – Science, Technology, Engineering, & Mathematics Initiative	38 -39
Additional National PTA Programs	40
<u>ADDITIONAL RESOURCES</u>	
Listing of Useful Websites for Resources	41
e Learning Classes	41
Generational Decoding	42
List of Acronyms	43
Useful forms:	
Sample budget	44
Sample Monthly Treasurer's Report	45
Sample Cash/Check Receipt Verification	46
Sample Expense Voucher	46
Back Cover – Region and Council Contact Information	



Dear PTA Leaders,

As we get ready for the new school year, your Colorado PTA has put together this Local Unit Handbook to prepare you to help support your school community. In this Handbook, you will find contact information for the Region and Council leaders. Remember, we are here to help and support your efforts to make every child's potential a reality and engage the families, teachers, and community members in reaching our collective goals.

We would also recommend the FREE e-Learning courses available to you as a PTA member. You can find the e-Learning Library list of courses by going to the National PTA web site, www.pta.org

The PTA Back to School Kit is totally electronic and mobile friendly. The Kit has a wealth of knowledge for running your PTA including guides for the president, board members, treasurer, membership and program chairs, in addition to tools for fundraising and marketing, program and advocacy resources, and your PTA-member exclusive offers from National PTA partners. DON'T FORGET to set up your personal profile to take advantage of all these resources that are only available to you as a PTA member!

Also included are a variety of sample forms, information to keep your PTA in good standing, and FAQ's to answer many questions we have received from you over the past years. Please reach out to any of us if there is any additional information we can provide for you.

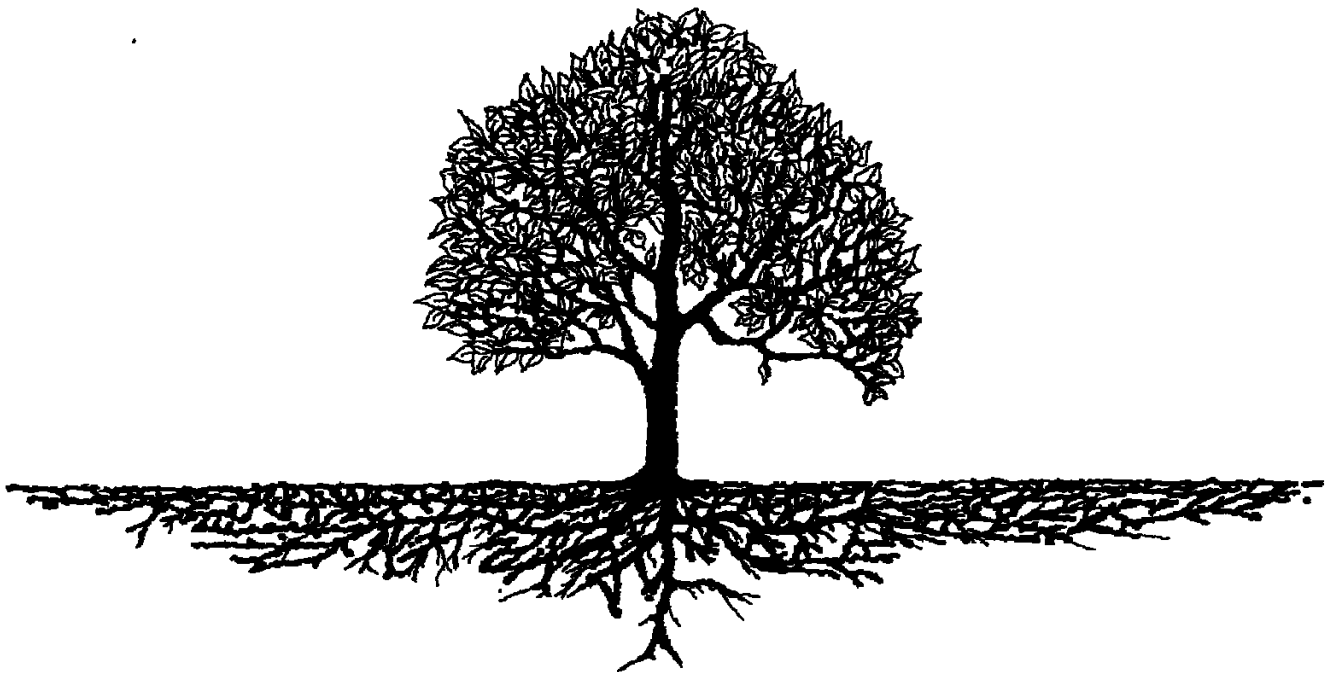
The Board of Directors of Colorado PTA wish you a successful and dynamic year, and THANKS YOU from the bottom of our hearts for your dedication and commitment to serving your school community and PTA!

Our Roots

My PTA Calendar

Why PTA?

PTA vs. Other Parent Organizations



“I’m planting a tree to teach me to gather strength from my deepest roots.”

-Andrea Koehle Jones, The Wish Trees

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My **PTA** Calendar!



August

Membership campaign begins when school starts and continues throughout the school year.
General membership must approve the budget.
Set up and announce the schedule for all meetings throughout the year.

September

Submit Financial Review/Audit Committee Report to state office
Elect Nominating Committee (check bylaws for procedure and timeline needed)
First membership report due by October 1st!

October

Review and submit insurance premium by November 1st deadline date. Insurance material will be mailed to your PTA from AIM Insurance Companies by September 30.

November

IRS form 990/990N/990EZ due by November 15th! (for most units, based on the fiscal year).
Renew registration with the Secretary of the State of Colorado-Charitable Solicitations, applies to PTAs that have \$25,000 or more in gross receipts annually.

December

Reflections entries due at Colorado PTA office for units not within a Council

January

Check to see if it's time to conduct the review of the bylaws
Reflections entries due at Colorado PTA office for units within a Council
Second membership report due by February 1st!

February

Colorado PTA Legislative Conference

March

Conduct elections and register for the Convention

April

Annual Colorado PTA Convention

May

Have a transition meeting with the incoming and outgoing board
Review/update/create procedure books

Summer

Turn in Officers' List by July 1st!
Complete and turn in Financial Review/Audit Committee Report (send Report by end of September).
Be sure to share training opportunities with your officers and committee chairs.
Set goals/objectives for upcoming year. This is most successful when including the principal and/or school staff.
A plan of work is recommended for all officers and committee chairpersons. Plans of work should be approved at first board meeting before school begins. Begin with planning goals, activities or programs for your unit. Propose a budget to support those plans and the funds necessary to meet them.

Legislative Committee meets on the 2nd Monday of the month, 6:30 to 8:30 PM. During the Legislative session, an additional meeting is held on the 4th Monday, 6:30 to 8:30 PM. All meetings are at the state office, or join by teleconferencing. Send an email to legislative@copta.org for the call in phone number.

Health, Wellness & Safety Committee meets on the 3rd Tuesday of the month, 12 to 1:30 PM, at the state office or join by teleconferencing. Send an email to HWS@copta.org for the call in number.

Why PTA?

Because we understand that when parents, communities, and teachers work together our children achieve more.

Because we understand the importance of a child advocacy association. Because issues affecting our children do not just happen at our school level; they happen in our states and in our country.

Because we do not just worry about our own children; we care about children regardless of race, religion, or socio-economic status.

Because we can build on the strengths and successes of PTAs nationwide, and we have access to support resources. We do not do it alone.

Because without a proper foundation, your parent organization will change from year to year depending on who is in charge.

What does PTA offer?

PTA understands the difficult roles parents and teachers have in helping our children thrive. We provide an organized means to promote parent and community involvement and networking to enrich education and welfare for all students.

PTA understands that the people who volunteer to run a parent association do not always come with the training to do so. PTA offers all of its officers training to be effective leaders.

PTA understands that issues affecting our local schools impact our children. State and federal government are making policies that have far reaching impacts on our children. Parents and teachers, who know children best, must also have a say in those discussions and policies.

What does that mean for my school?

Most people join PTA through their local school. It is a great way to get involved in the school, meet other parents, and be part of a nationwide child advocacy organization. While PTA offers a stable foundation for the parent organization at your local school, PTA grows through building on successes of our local schools.

Forming a PTA at your school connects you with a nationwide network of resources, programs, and assistance. For example, it is well known that children do better in school, and schools do better, when parents are involved, but parent involvement is an ongoing problem for most schools. PTA has been involving parents in schools for over a century, developing meaningful programs and resources, and meeting the needs of underrepresented groups.

PTA also offers training in running your Parent Teacher Association. Training volunteers is invaluable as it helps your organization steer away from common pitfalls and problems that often affect parent organizations. PTA also offers support for your local unit with answers, advice, and encouragement.

What does that mean for our students?

PTA works tirelessly on behalf of children. Students benefit from the PTA advocating for them and with them at the federal, state and local levels of government. Students also benefit from healthy communities that PTA seeks to build by working with local businesses and community members. Students enjoy enhanced educational opportunities in schools where PTA members volunteer and work with the school on behalf of the students.

PTA focuses on the whole child and offers programs for students. For example, the Reflections program encourages quality arts education and expression. The program offers students the opportunity to explore their artistic talents and create works of art for fun and recognition in six different areas: visual arts, literature, music composition, dance choreography, film production, and photography. Each year some of the national winners are placed on display at the Department of Education in Washington, D.C.

Our History

The Parent Teacher Association (PTA) was started in 1897 by two women, who believed that although women did not yet have the right to vote and social activism was frowned upon, mothers had the strongest bond with their children and needed to speak up for their welfare. At the first meeting, Alice McLellan White Birney and Phoebe Apperson Hearst had hoped for a group to join their fight for child labor laws. Over two thousand attended, and the National Congress of Mothers was born. The idea that parents need to be advocates for their children still resonates as strongly in parents and teachers today.

Looking forward

PTA is advocating for our children today. We are working for a fully-funded, quality education system; zero-tolerance of bullying and violence in schools; updated school nutritional standards; internet safety; quality after-school programs; better access to and preparation for college; and training in cultural competence skills.

Did you know

PTA, with 5 million members, is the largest organization in the world dedicated to helping and advocating on behalf of children. PTA is a grassroots organization that takes a stand on issues coming from its membership. EVERY officer in the PTA is a volunteer. PTA annual dues are minimal. PTA strives to be accessible to all! PTA works in cooperation with many national education, health, safety, child advocacy groups and federal agencies. Through this collaboration, PTA has fought for and won policies which include: kindergarten classes, child labor laws, public health service, hot lunch programs in schools, juvenile justice system, mandatory school immunizations.

PTA vs. Other Parent Organizations: What's the Real Difference?

"PTO" is a term used to describe generic parent organizations that are site based and work only for their individual schools. PTA is a trademarked name that stands for "Parent Teacher Association." We are a 501(c)(3) non-profit whose primary role is to advocate for all children.

IRS REGULATIONS

Occasionally we hear parents or principals say they would like to dissolve their PTA and form their own non-profit, fundraising organization, feeling a non-PTA will be easier to manage. Not true, in fact we make it easier for you! All 501(c)(3) non-profits must abide by the same IRS rules. All must file taxes, have insurance, bylaws, and officers. PTA simplifies these processes and provides support when you have questions or problems.

MEMBERSHIP

PTA membership dues are very low, \$10 per year for most local units. Local units remit \$6.25 per member to Colorado PTA which is distributed the following way: \$2.25 to National PTA, \$3.00 to Colorado PTA, and \$1.00 to Regions or Councils. In return, local units receive materials, training, access to programs, grants, awards and members have the knowledge that PTA representatives from across the country, are going before Congress, our state legislatures, and local school boards to fight not only for adequate funding of our schools but for reasonable and realistic (not to mention funded) mandates for teachers. For example, did you know that Colorado PTA advocated AGAINST Senate Bill 191? Or that Colorado PTA was the lead plaintiff in a lawsuit against the state when the legislature passed a voucher law?

NETWORKING

Locally, it is your PTAs that have the networking capabilities and support to campaign for mill levies and ballot initiatives that benefit our schools and our children.

Here are some other reasons your school benefits more from having a PTA:

- **ADVOCACY:** PTA helps parents and citizens learn more about local, state, and federal public policies affecting children and schools.
- **AWARDS & RECOGNITION:** PTA provides grants, awards, recognition, and scholarships at all levels!
- **BENEFITS:** Member benefits and discounts at www.copta.org and www.pta.org.
- **EVERYCHILD.ONEVOICE:** Our tagline says it all. We are a powerful voice for children, 5 million members strong.
- **FINANCIAL HELP:** It is not uncommon for PTA to receive phone calls from other parent organizations asking for help with the IRS or embezzlement. Only PTAs provide the support to help walk you through financial difficulties.
- **INSURANCE RATES:** PTA makes certain our local units receive the best rates for the best coverage and appropriate coverage for specific events.
- **PROGRAMS:** PTA has programs like Healthy Lifestyles, Schools of Excellence, and more!
- **REFLECTIONS:** The National PTA Reflections Arts Program (started in 1969 by a Colorado PTA president) engages more than half a million students each year.
- **SUPPORT:** Dealing with a conflict? Have questions about the operation of your local unit? PTA's support system ensures our local units receive the help they need to run smoothly. With other parent organizations, you're on your own.
- **VOLUNTEERS:** From your local unit president to the state PTA president on up to the National PTA president, we are a core of volunteers focused on the education, health, and well-being of all children. We are the largest child advocacy organization in the world working to ensure all our children have the opportunity to lead successful, happy lives and to reach their full potential.

This is who we are. We are PTA. We speak for every child with one voice.

We need 4 hugs a day for survival.
We need 8 hugs a day for maintenance.
We need 12 hugs a day for growth.

~Virginia Satir



H.U.G.S.

~Healthy Unit in Good Standing Requirements

~Officers List

~Membership Report

~Insurance

~Bylaws

~Nominating Committee

~Financial Review / Audit Committee Report

~General F A Q S

Requirements to be a Healthy Unit in Good Standing (HUGS)

Officers List

Your officer list helps us provide you with valuable information throughout the year.

- ⇒ Turn in your Officers List to the Colorado PTA office by July 1. This is completed online, www.memberplanet.com/s/coloradopta/newofficers Your typed information cuts down on returned emails! Don't have all the information? That's okay – send what you have and update with additional/changed information later.

Membership

- ⇒ Conduct an ongoing membership campaign.
- ⇒ Membership Report - Cover Submittal and dues are required to be submitted by October 1 and February 1 (even if no new members after October 1). Reports may be submitted as often as needed – you may want to file more often to take advantage of our great membership challenge awards!

Insurance

- ⇒ Purchase general liability, bonding and director and officer liability insurance by November 1.
 - Your unit may take advantage of Colorado PTA's group buying power and select its carrier AIM. You will be getting information directly from AIM and will be paying them directly.
 - If selecting your own carrier, proof of insurance must be sent to the Colorado PTA office.

Bylaws

- ⇒ Your unit's bylaws must be approved and filed every time you make a change and every three (3) years by the Colorado PTA Bylaws Committee. Request the bylaws template and submit bylaws for approval by February 1. Once your membership approves your bylaws, they are in effect. If you need help updating your bylaws, contact your council/region representative or the Colorado PTA office.
- ⇒ Be sure to read your unit's bylaws. They provide the structure of the local unit's board, information on required meeting dates and other information necessary for the unit to function.

Fiduciary records

- ⇒ Conduct a financial review/audit within thirty (30) days of the close of the fiscal year. Your incoming President and Treasurer must sign the review and it needs to be presented to your board for adoption. A copy of the Financial Review/Audit Committee Report must be sent to the Colorado PTA office by the end of September.
- ⇒ All units must file the appropriate IRS Form 990 (990N – epostcard, 990EZ, or 990). Deadline to file is the 15th day of the 5th month after your fiscal year ends (for example: file by Nov 15 if your fiscal year ends June 30).
 - To file a 990N online (your gross receipts are less than \$50,000), go to <https://sa.www4.irs.gov/eauth/pub/login.jsp?> If this is your first time, you will need to create an account. Make sure and record your User ID and password!
 - A copy of the IRS Form 990 filing must be sent to the Colorado PTA office. Need to file for an extension? Provide Colorado PTA with documentation of the extension.
- ⇒ Units grossing over \$25,000 for three or more consecutive years need to register with Secretary of State (Colorado Charitable Solicitations Act) for a small fee. Once you register, you must continue to renew annually. You will need a copy of your unit's most recent IRS Form 990 or financials to complete the registration.
 - A copy of the email confirmation received from the Secretary of the State must be sent to the Colorado PTA office.

Thank you for all that you do for the children of Colorado. [Your Council/Region representative or the Colorado PTA office](#) is an email or phone call away for any questions, concerns, or assistance.

Welcome to the wonderful world of PTA! We are here to help and support your efforts to make every child's potential a reality and engage the families, teachers, and community members in reaching our collective goals.

Your officer list helps us provide you with valuable information throughout the year. Turn in your Officers List to the Colorado PTA office by July 1. We must have your email addresses as all our communications are electronic. We must have your physical addresses. Sadly theft and embezzlement by volunteers is on the rise and without a physical address the legal papers cannot be served. Don't have all the information? That's okay – send what you have and update with additional/changed information later.

Here's an overview of the various committees and appointed positions to consider for your PTA. An asterisk (*) denotes that it is required committee or position. Resources and materials are available at www.ptakit.org

*Membership Committee - Creates, implements, and assesses a year round membership plan that includes retention strategies as well as action steps that target and attract new members.

*Finance Committee - Works to make sure the PTA is in good financial health, in good standing with the IRS and other government authorities, that its resources are used appropriately, with members to write grants, assist with sponsorships, and help raise funds.

*Nominating Committee – Helps ensure your unit's future by assessing the needs of the PTA and the skills needed from potential leaders, which include reaching out and vetting.

*School Accountability Representative – Colorado law requires a School Accountability Committee and that at least one member is from an organization of parents, teachers, and students recognized by the school (Your PTA!).

Advocacy Liaison – Serves as a link between your PTA and the council and state regarding current legislative and advocacy issues.

Reflections – Coordinates the Reflections program and provides students in grades P-12 to explore and enter pieces in: Visual Arts, Photography, Literature, Film Production, Dance Choreography, and Music Composition.

Health, Wellness, and Safety Liaison – Serves as a link to members to school, district and community resources that support healthy, safe schools and healthy lifestyles for students and families.

- Don't hesitate to ask questions. You are not expected to do the entire job alone. [The Colorado PTA Region directors, Council board members, and the state office](#) are here to help you. We are always a phone call or email away.
- Take advantage of E-Learning trainings offered online at www.pta.org, the reference guides for the leaders at www.ptakit.org Familiarize yourself with the National PTA and Colorado PTA websites, www.pta.org and www.copta.org
- Be on the lookout for announcements about Region/Council trainings that are usually in August and September.



Cover Submittal Form for Local Unit Membership Report

Date _____ Colorado PTA Region _____ Council _____

Student Population (i.e. K-5, 6-8, K-12, PK, etc.): _____ or ☐ Community

District: _____ Type School: ☐ Public ☐ Private ☐ Charter ☐ Early Childhood

PTA/PTSA Unit Name _____

PTA/PTSA Address / Zip _____

Name of Membership Chair (or President, if applicable) _____

Home Address / Zip _____

Home Phone _____ E-mail _____

School information

- Total number of **full time** Staff at school _____
- Total Student enrollment this year _____

Unit Membership Report: [NOTE: A member may be counted in only one (1) category]

- Number of new **Parent** members on this report _____
- Number of new **Staff** members on this report _____
(Includes all **full time** certified and classified personnel)
- Number of new **Community** members on this report _____
- Number of new **Student** members on this report _____

In an effort to better know our state's PTA member representation, please provide the following:

- Total number of **Male/Female** members on this report _____ Male _____ Female
- _____

1. Number of new Individual Memberships this report _____ x \$ 6.25 = \$ _____

2. Number of new Business Partners this report _____ x \$10.00 = \$ _____

ENCLOSED [TOTAL 1 + 2] = \$ _____

INSTRUCTIONS:

- Mandatory membership reports are due to the Colorado PTA office postmarked no later than **October 1 and February 1**. Additional membership reports may be sent to the Colorado PTA office as needed.
- If your PTA is not using memberplanet to manage its membership, mail this report with the payment and email the Membership Listing report.
- If your PTA is using memberplanet to manage its membership, mail just this report with the payment.
- Check made payable to "Colorado PTA" **[with two signatures]** must accompany this report or invoice.



STOP!!!



ARE YOU COMPLETELY COVERED BY INSURANCE???

WHAT COVERAGES DOES YOUR PTA NOT HAVE???

DON'T GET CAUGHT UNPROTECTED!!!

General Liability

The General Liability policy protects you from lawsuits if someone was injured at one of your organization's activities and held you responsible. The liability limit for a lawsuit is \$1,000,000 or \$2,000,000, with no deductible. The policy also provides \$5,000 of medical payments if a lawsuit has not been filed. Some activities covered include **skating parties, fall carnivals, bounce houses, dunking booths, fun runs, auctions, and more. Injuries resulting from transportation are not covered under this policy.**

Accident Medical

The Accident Medical policy is designed to complement your General Liability policy. It provides **medical coverage only (no coverage for a lawsuit)** for injuries sustained at one of your organization's activities. This coverage also applies to injuries specifically excluded from the general liability policy such as mechanical rides, school buses, automobiles, and watercraft. **This policy includes payment for cost of medical treatment arising from accidents occurring on school buses for your sponsored field trips.** The Accident Medical limits are \$10,000, \$25,000, and \$50,000, with no deductible.

Bond Insurance

The Bond policy protects your money. It covers **anyone who your organization trusts with the money** whether it's a President, Treasurer, board member, volunteer, or courier. If that person embezzles (runs off) with your money, this policy would replace those missing funds. The bond limits are \$10,000, \$25,000, and \$50,000, with a \$250 deductible.

Property Insurance

The Property policy protects **your raffle merchandise, auction items and fundraising supplies while it is in your possession.** This policy also protects any personal property of your organization such as **popcorn machines, snow cone makers, school store supplies, emergency relief supplies, and more.** The policy limit is \$10,000, with a \$250 deductible.

Officers Liability

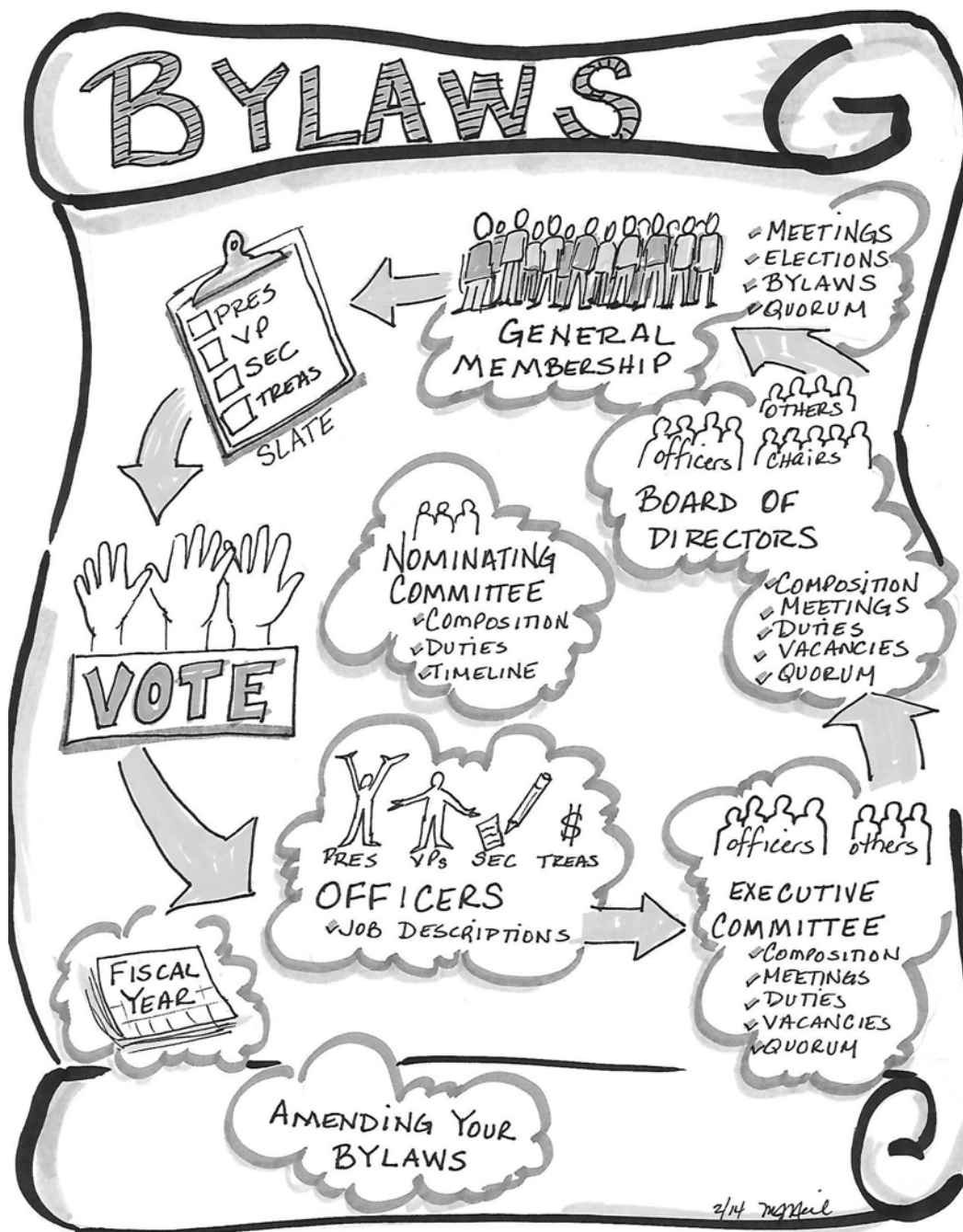
The Officers Liability policy protects the organization from lawsuits for "wrongful acts". If someone sued the officers of your organization for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions this policy would pay to defend you against those actions. This policy is also referred to as **Directors and Officers Liability (D&O).** The policy limit is \$1,000,000, with a \$1,500 deductible.

If you have any questions about these coverage's or need any additional information, please call AIM at (800) 876-4044 or visit their website at www.aim-companies.com.

Bylaws are the rules your PTA must follow. They are adopted and amended by a vote of your PTA's members at a general meeting with advance notice. PTA bylaws may not conflict with the bylaws of the national organization or state PTA. If you need a copy of the bylaws, contact your Region Director, or Council President, or the state office to obtain one. All officers should be familiar with the bylaws. Any PTA member has a right to view them.

Bylaws provide the following important information:

- The structure of your board
- Information on required meeting dates (may include how notification is given)
- Nominating committee formation
- How and when to conduct elections
- Dates for the fiscal year
- Requirements of a quorum for conducting business



Nominating Committee Instructions

Selecting the nominees for the officers of your PTA/PTSA is an important job and must be done with careful consideration. Rules for your nominating committee including committee member selection, timeline, and responsibilities may be found in your local unit bylaws. The committee's responsibility is to nominate the best-qualified candidate for each office. The Colorado PTA has volunteers ready to assist you in the process if desired.

Getting started:

1. Elect a chair
2. Appoint a secretary (optional). Accurate notes need to be taken for committee use only.
3. Do a modified plan of work. Establish a timeline and determine the process the committee will use.
4. All committee members should have copies of bylaws, standing rules, and job descriptions.

Selecting nominees for your PTA positions:

1. Nominees must be a member of a PTA. This allows for a PTA member to be a nominee for the next year's school's PTA when not currently a member.
2. Seek suggestions from the membership in an unbiased process. Any PTA member may suggest the names and qualifications of persons to be considered. However, the committee is not bound by such recommendations.
3. Select the best candidate for the office.
4. The most important consideration of a person for office is their qualifications.
THIS IS NOT A POPULARITY CONTEST.
5. A presidential nominee should not be asked whom he/she would like for running mates.
6. All nominees should be selected with the same care as the presidential nominee.
7. Members of the nominating committee should never approach a potential candidate as to willingness to hold office before the committee meets.
8. The committee is not obligated to nominate the president or any other current officer to serve a second term or to nominate automatically the first vice president for the president. Each nominee must be evaluated equally and by the same criteria.
9. Members of the committee are not excluded from becoming nominees for elected office, unless prohibited by your bylaws. **During committee meetings, should a committee member be nominated, this member should be excused from the meeting room during the discussion regarding that office, but may return for the vote.**
10. Consider the kind of leadership that will best serve your PTA.
11. Review the tenure of incumbent officers to determine their eligibility for another term in the same office or in another position. Check your bylaws to determine if an officer may serve a second term. Try to avoid reshuffling officers.
12. Think carefully about possible candidates: their qualifications, their ability to work with others, and if they have time to do the job.
13. **Do not assume a person does or does not want to accept an office.** Give them the opportunity to accept or decline.

Committee Procedures:

1. Review job descriptions to determine the best candidate for a particular office.
2. The office of president (or president-elect) and first vice president should be considered first by the committee.
3. In the event a member of the nominating committee should be nominated for either the office of president (or president-elect) or first vice president, the member would be excused from the committee and be replaced by the first alternate. The person should leave the room immediately. The slate must be kept confidential.
4. Ballots are to be used throughout the entire meeting(s) even if the vote seems unanimous. After the vote, the ballots should be destroyed.

5. A majority of the committee must agree, before a person is asked to accept any position.
6. If a person wishes to discuss accepting a position with their family before accepting, or if they wish time to think about it allow them that courtesy. However have a specific time to respond.
7. Caution each individual selected to “not say a word.” The slate should be confidential until announced at the meeting date specified in your bylaws. Some bylaws require a thirty (30) day notification period. Follow your bylaws.
8. Develop a tentative slate of officers with possible alternates for each office.
9. The chair should contact potential nominees unless delegated specifically to another committee member. The procedure for communication should be in place. A potential nominee is contacted **only** after being agreed upon by the committee.
10. It is rarely advisable to talk a reluctant candidate into accepting a nomination.
11. Tips on approaching a potential nominee: All jobs are important. Do not minimize time or commitment. Everyone should feel they are the perfect person for this job. “You were chosen.” Give a very clear indication of the responsibilities of the office. Furnish the potential nominee with a copy of the job description. Include responsibilities of a board position, number of meetings, trainings, etc.
12. The committee makes all decisions together as a group.
13. **ALL DELIBERATIONS OF THE COMMITTEE ARE CONFIDENTIAL.**

Sample Election Process

The necessary quorum may be found in your local unit bylaws under the Article on Officers and Their Election. Your president chairs the meeting. Should he/she be running for an office with more than one candidate, someone else, with the approval of the members present, may conduct the election. Colorado PTA will find a PTA leader to assist in the election process if desired. Contact the Colorado PTA office for assistance.

Qualifications for officers:

- PTA member at your PTA during elected term;
- Consent to serve in nominated/elected position;
- Refer to your bylaws for other required qualifications.

Only your local unit PTA members may participate in the election process. This is a benefit of being a PTA member. Ask those in attendance, who are not current members, to sit together on one side of the room. Those who are not members should have paid member dues prior to the meeting to participate in the election process. This will make it easier to distribute ballots, should they be necessary. Ballots may be small pieces of blank paper. Bring plenty to the meeting.

Election Process: Nominations from the Floor Script

Chair: “This evening we will elect the officers for the [20__ – 20__] school year. The nominating committee will read their report. After their report, we will open the meeting for nominations from the floor for each position.” The nominating committee will now give their report.”

Nominating Committee: Reads nominees for each office.

Chair: “Thank you **(person giving report)**. Please read the job description from the bylaws for the office of president.”

“Nominations are now open for the office of president.”

With each nomination from the floor, have the person nominated, stand up and ask,

“Are you a member of a PTA? Are you willing to serve if elected and represent the PTA Purposes? “

Instruct **(person giving report)** to place the Nominating Committee nominees and each name as nominated from the floor on an overhead transparency, flipchart, or white board.

Note: *If the nominating committee had forms signed, have these volunteers sign the forms too. If the person isn't present, check to see if they have signed a consent form.*

Chair: "Seeing no further nominations for president, I declare nominations closed for the office of president."

Note: *Repeat process for president-elect, vice president, secretary, treasurer, and any other officers/elected positions specified in your bylaws.*

Election Process: Elections

For positions with more than one candidate:

Chair: "Since there is more than one candidate for the office of **(elected position)**, we will vote by ballot. As I call your name, please stand and tell the membership why you would like to be elected as **(said, elected position)**."

Note: *Set time limit for response by candidate. Request that the ballots be passed out. Appoint two (2) people (suggest a PTA member who is not on the board or the nominating committee and another PTA member) to distribute, collect, and tally the ballots.*

Those voting should clearly write their selection on the piece of paper, fold it in two, and raise their hand with the ballot. Those collecting ballots should bring them folded to the counting area, unfold and report to the chair the results. The results should be reported to the members.

Record the total ballots cast and the total for each candidate on the transparency, flipchart, or white board. If one of the nominees receives a majority of the votes cast, declare them the winner. If not, re-ballot until one candidate has a majority.

For positions with only one candidate:

Chair: "Since there are no further nominees for the offices of **(list positions)** I declare these nominees elected by acclamation."

Note: *If a member objects, then conduct an election by voice vote.*

Chair: "All those in favor of electing (read names and positions), say, Aye. All those opposed, say, No."

Once everyone has been elected

Chair: "Congratulations to our newly elected officers. The election ballots will now be destroyed." "Would **(PTA leader)** please install our newly elected officers?"

Note: *Colorado PTA can arrange to have a PTA leader install your newly elected officers at this or a future meeting. Contact the Colorado PTA office to request.*

Sample Installation Ceremony

To the retiring officers

Will *[recite their names]* please rise to be recognized? We express our gratitude to you for the devoted service that has marked your tenure as officers, and we urge you to continue your efforts to promote the interests of children and youth. Thank you. Please be seated.

To the continuing officers

Will *[recite their names]* please rise to be recognized? Will you provide ongoing support for the new officers who join you at this time? Answer, "I will." Thank you. Please be seated.

To the new officers

[recite their names and office held]

Will you individually and together work toward the fulfillment of our Purposes in the service of children and youth? Answer, "I will." The present and the future of _____ PTA now rest on your beliefs and abilities, your commitment and powers of implementation, and the faith and help of all other members of the association. Will you pledge yourselves to these people, that service? Answer, "I will."

To audience of PTA members

Members of _____ PTA, please rise. Here are your new leaders for the coming year. They will need your encouragement and support. Do you promise them your loyalty and cooperation, in the names of the children of this school community? Answer, "I do."

To the new officers

With a strong belief in your abilities, with renewed hope for PTA, I now declare you duly installed officers for *[term of office]*.

PTA Financial Review/Audit Committee Report Form

Fiscal Year: _____, 20____ to _____, 20____

for Account #: _____ which is the **Checking, Savings, Other-**_____ (circle one)

at: _____ (Name of institution)

Signers on this account: 1) _____ 2) _____ 3) _____

PTA Unit Name _____ Council _____ Region _____

1. Beginning account balance
[should agree with prior year Fiscal Year-End (FYE) balance – line 9] \$ _____
2. Add: receipts (deposits) during current fiscal year (+) \$ _____
3. Subtotal (add lines 1 & 2 together) = \$ _____
4. Subtract: Disbursements (expenses) or transfers during current fiscal year (-) \$ _____
5. Balance on hand at end of fiscal year (subtract line 4 from line 3) = \$ _____

*** Reconciliation to Bank Statement Balance ***

6. Balance per Bank Statement as of FYE Date: _____ \$ _____
7. Subtract: total outstanding checks (-) \$ _____
8. Add: total outstanding deposits (+) \$ _____
9. Balance on hand (should match line 5) = \$ _____

NOTE: Amounts on line 5 and line 9 should be the same.

Date of Audit: _____

We have examined the books of the treasurer of _____ (local unit name) PTA and find them to be
(Please choose one of the following to complete the sentence):

- ☐ correct
☐ incomplete
☐ substantially correct with the following adjustments:

☐ incorrect

Committee Member's Signature

Committee Member's Signature

Committee Member's Signature

President's Signature

Treasurer's Signature

Date

Email or mail the completed Financial Review report and supporting documentation to the Colorado PTA office. The report should be read by a member of the Financial Review Committee or the Secretary at the first general membership meeting of the new school year.

General F A Q S

Below you will find answers to some of the frequently asked questions we receive in the Colorado PTA office.

How do I get my PTA's IRS determination letter?

Send an email to office@copta.org. Colorado PTA issues a letter verifying and confirming your PTA's EIN and the subordinate relationship between your local PTA and the state PTA upon request. It will include a copy of Colorado PTA's determination letter from the IRS. Colorado PTA requires the PTA unit to be in good standing (See HUGS) before the letter will be released to your PTA.

Do I have to pay sales taxes on our PTA's purchases?

Your unit shouldn't pay Colorado sales tax on most purchases made by your PTA as Colorado PTA has the Sales/Use Tax Exempt certificate for use by local PTAs. Send an email to office@copta.org to receive an electronic copy.

Where do I find the forms for the Financial Review, Membership Reports?

Most of our forms can be found on our website, under the tab "Officers Forms & Resources."

What happens if we're late with the membership dues?

Membership reports and remittance of dues are not considered late as long as they are postmarked by the due date. If your PTA is participating in Reflections, the Membership Challenge, or other programs/awards, it is necessary to remit on time. Otherwise, your PTA unit will not be considered to be in good standing until the office receives the dues.

Why are you asking for our membership contact information?

Every member that joins your PTA automatically becomes a member of Colorado PTA and National PTA. We only share the database within PTA, Region Directors and Councils.

Our PTA is suspended by the Secretary of the State of Colorado-Charitable Solicitations, what do we do?

Typically a PTA is suspended because they weren't aware of the need to renew the registration annually because the reminders from the Secretary of the State are sent electronically. We recommend setting up an email account that will be handed down to future officers to ensure the delivery of these reminders. After you've set up this email account, send an email to charitable@sos.state.co.us requesting help to reset the log in and password. Be sure to include your PTA's EIN # in this email.

Can we pay for child care providers during our meetings?

Yes, your unit can pay for childcare providers, HOWEVER, they are not covered by AIM Insurance as they are considered to be independent contractors. If your membership approves this expense, be sure that the providers have liability insurance. If your PTA pays a contractor \$600 or more in a calendar year, you will need to provide IRS Form 1099 to the contractor and file IRS Form 1096.

AIM Insurance recommends using at least two volunteers, 18 years or older. Please check out their great Resource Guide. See the *Additional Resources* section to download a copy.

Do we have to do a financial review/audit? How do we do a financial review/audit?

Yes, this is required by the IRS and AIM Insurance. Plus, this provides transparency and accountability to your members. First, check your PTA unit's bylaws for information on how to set up the Audit/Financial Review Committee. Then visit www.ptakit.org for guidance about conducting the Financial Review or Audit. The Financial Review/Audit Committee Report form is available at www.copta.org, under the tab, "[Officer Forms & Resources](#)."

Who approves the budget?

The board prepares and presents a budget for the membership to approve, usually at the first general meeting of the year. When there are additional expenses or a change in an allocated item, the budget may be amended, with advance notice, by a vote of the membership at any regular meeting or at a special meeting called for that purpose. Be sure to check out www.ptakit.org for more in depth information.

How do I get a copy of my unit's bylaws? How do I get the template? Why do I have to conduct the three year review of the bylaws?

If you need a copy of your unit's bylaws or the local unit bylaws template, send a request to office@copta.org. Your Region Director or Council can help with the process.

National PTA and/or Colorado PTA may make changes to the bylaws; thus conducting the three year review with the current version of the local unit bylaws template ensures that your PTA's bylaws are up to date. Typically the changes that National PTA and/or Colorado PTA make are in direct response to legislation affecting not-for-profit organizations and associations.

Our PTA received a letter from the IRS, what do we do and can you help?

Please scan, fax, or take a picture of the letter and send/email to the state office. Please do not respond to their letter until after the state office has provided advice. We can help your PTA respond appropriately and in most situations issues are resolved quickly.

How do I get started, I don't know where to begin?

We know that it can be hard when you're not sure what to ask. Read our Colorado PTA newsletters (check your Junk Mail/All Mail folder or let us know if you aren't receiving them) and PLEASE forward on to your members! Visit our website www.copta.org, and of course your [Region Director, Council Board of Directors, or Colorado Board of Directors](#) are always an e-mail away.

Register for the Official PTA Back to School Kit at www.ptakit.org and turn possibilities into realities.



Advocacy

“Our lives begin to end the day we become silent about things that matter.”

-Martin Luther King Jr.

The Legislative Committee
What is an Advocacy Liaison?
Resolutions
Election Dos and Don'ts for PTAs
Every Student Succeeds Act

COLORADO PTA LEGISLATIVE COMMITTEE

What are the functions of the Legislative Committee?

- Networking of information on state and national legislative issues and PTA's positions, and making this information available to the local units.
- Advocating on PTA's positions to our state and federal legislators and to the general public.
- Advising the Public Policy Director about positions to be recommended to the Board of Directors on issues not covered by national or state platforms and resolutions.
- Collaborating with other like-minded organizations for the purpose of advocacy on issues of importance to PTA.

Who are the members of the Legislative Committee?

- The Legislative Committee consists of members appointed by the Public Policy Director with the approval of the Colorado PTA President. Every effort is made to include at least 3 people from each of the Colorado PTA Regions. These people can include any of the following:
 - Any PTA member who attends regularly and participates actively
 - Region Directors and Council Presidents and/or their Legislative Chairs
 - The COPTA Federal Legislative Chair
- Any interested PTA member may attend the Legislative Committee meetings and participate in the discussions. However, they will not be considered a voting member until they have attended 3 meetings and have received the approval of the Public Policy Director.
- Colorado PTA bylaws state that 2 unexcused absences from a committee meeting shall constitute a resignation. Participating via video or teleconference is considered as being in attendance.

How does the Legislative Committee operate?

- Meetings of the full committee are held on the 2nd and 4th Mondays of the month from January through May, 6:30-8:30 p.m. Meetings are held only on the 2nd Monday of the month from June through December, 6:30-8:30 p.m., unless scheduled otherwise.
- Meeting agendas may include, but are not limited to, the following:
 - Standing reports: Federal Legislative Chair, advocacy initiatives, and progress on priority initiatives.
 - Discussing proposed legislation to determine COPTA's position on bills.
 - Strategic planning for advocacy efforts.
 - Reviewing resolutions or positions being proposed by the Resolutions Committee.
 - Training for Legislative Committee members.
 - Organizing subcommittees.
- Ad hoc subcommittees may be formed for tasks including, but not limited to:
 - Planning the annual COPTA Legislative Conference.
 - Updating the resolutions book and recommending new resolutions.
 - Reviewing and recommending edits to the Legislative Platform. The current year's platform can be found on the Colorado PTA's website.
 - Researching specific proposed legislation.

How are votes conducted?

When it becomes necessary for the Legislative Committee to vote on a position recommended for adoption by COPTA, the vote is based on a quorum of attending committee members in good standing (see above). The quorum shall be a minimum of 7 people from at least 3 different regions, with a simple majority being required to pass the vote.

Revised September 2014

What does a PTA Local Unit *Advocacy Liaison* do?

A “liaison” is someone who is a channel of communication between groups of people.

The Basics:

Serve as a link between your local PTA unit and the state PTA.

When the Council, Region, or state PTA shares information with you regarding legislative and advocacy issues, make sure it gets distributed through your unit’s usual communication method (i.e., newsletter, email, or website) and share this information at your PTA’s regular business meeting – much like the report given by your membership chair or treasurer.

Take an active interest in programs and policies at your school.

A good way to do this is by working with your School Accountability Committee (SAC), either by serving as the PTA liaison to the SAC or by sharing information with the person who is. The SAC’s work is largely focused on the school’s and district’s achievement data, the Unified Improvement Plan (UIP), and the school’s and district’s budget.

Familiarize yourself with the 6 *National Standards for Family-School Partnerships*. Because so much of PTA’s work is centered around them, make a note to pay extra attention to Standard 4 (Speaking Up for Every Child) and Standard 5 (Sharing Power) –

<http://www.pta.org/programs>

Other Advocacy Opportunities:

(We understand everyone’s time and interests vary. Advocacy doesn’t stop with the Basics. If you have the time and interest, here are other ways to advocate and become more involved.)

- Take an active interest in key issues affecting children and youth.
- Be an informed voter.
- Attend school board meetings and/or be aware of district policies.
- Attend meetings of the District Accountability Committee.
- Attend the [Colorado PTA Legislative Conference](#).
- Know who your legislators are at the [state](#) and [national](#) levels and who represents you at the city and county levels.
- Know how elected officials representing you vote on key issues, and visit with some of them.
- Attend some candidate forums, issue forums, and/or public meetings sponsored by your elected officials.
- Get on email distribution lists for legislative action alerts, and/or join organizations that advocate on children’s issues.
- Join the National PTA’s “PTA Takes Action” (<http://www.pta.org/advocacy/takesaction.cfm?navItemNumber=3451>).
- Respond to PTA Action Alerts.
- Speak up at public meetings on PTA’s issues and positions.

How to Submit a Resolution to the Colorado PTA Convention

What is a resolution?

A resolution is a motion brought forward at Convention and voted on by the delegates. It is a formal statement of the opinion, will, or intent of the association.

Why submit a resolution?

When PTA members would like to take the lead on issues, problems, or situations that are directly affecting the education, health, safety, or welfare of children and youth, a resolution is one tool to bring the issue forward so that PTA can take action.

What form does a resolution take?

A resolution consists of two parts:

- WHEREAS statements that provide the rationale for the resolution by briefly identifying the problem, advising on the timeliness or urgency of the problem, and giving background information.
- RESOLVED statements that express the requested action(s) or policy change(s) desired and specify who in PTA should take the action(s) or advocate for the policy change(s).

Who may submit a resolution to Colorado PTA?

Resolutions may be submitted by local units, councils, standing committees, or the COPTA Board of Directors.

What criteria must a resolution meet?

- Concern an area of interest to the Colorado PTA.
- Be in harmony with the purposes and policies of PTA.
- Concern a matter that is statewide in scope.
- State a position not previously adopted by PTA.
- Be accompanied by documentation that substantiates each “whereas” statement. Background material must be factual and verifiable and be sufficient to give a person with no previous knowledge of the subject enough information to make an intelligent decision.

Procedure for submitting a resolution

1. Complete the application form and obtain the signature of the president, director, or chairperson.
2. Submit the resolution in proper format (the Submittal Form is available on www.copta.org).
3. Ensure that the Colorado PTA office receives it by November 30.
4. Have a designated Convention delegate prepared to speak to the resolution.

Implementing resolutions

After adoption by Convention delegates, resolutions are reviewed to see what action must be taken by Colorado PTA. They might be referred to a committee or division. The PTA Legislative Committee uses them to take positions on bills. PTA members are encouraged to do their part as indicated in the “resolved” statement(s).

Emergency resolutions

Emergency resolutions may be submitted only if the urgency of the subject matter has arisen after the established deadlines. They must first be reviewed by the Resolutions Committee to ensure that they are in the proper format and meet the basic criteria. They may be brought to the Convention floor by a two-thirds vote of the Convention body. Sufficient copies must be made available for all voting delegates.

NOTE: If you would like to submit a resolution, please contact office@copta.org and let us know about your intent. The Resolutions Committee will contact you with detailed information and instructions. We recommend that you do this as far in advance of the November 30 deadline as possible.

ELECTION DOS AND DON'TS for PTAs

With the school board elections and potential ballot initiatives, it's important you and your members are aware of the laws around what your PTA can and cannot do.

1) PTAs **CANNOT** support/endorse/oppose candidates. This is IRS law. If your PTA endorses a candidate you not only jeopardize your PTA's non-profit status but the non-profit status of every PTA in Colorado, as we are all subordinates of Colorado PTA.

2) PTAs **CAN** support or oppose ballot issues. If your PTA wishes to take a position to support or oppose a ballot initiative you must have a majority vote of your membership (not just your Board) and you must give your membership fair notice that the vote will take place (7-10 days).

501(c)(3) Status and Law. Because PTA is a 501(c)(3) non-profit corporation, the IRS does not allow PTA to support candidates. It is legal for PTAs to inform voters of an election and list ALL the candidates who are running. PTAs may hold candidate forums, as long as ALL candidates are invited.

Advocating for an Initiative. Colorado PTA prefers that local units help ballot issue campaigns by providing volunteer assistance with such things as literature distribution, yard signs, phone calling, etc., rather than making monetary contributions. Voter registration drives are encouraged.

Campaign Donations. The IRS does not allow local units to contribute more than "an insubstantial amount" of their gross revenue to ballot issue campaigns or lobbying. This is generally viewed as being between 2% and 5% of gross revenue. (Please note that this refers to the total amount given to all ballot issues and lobbying throughout the year.) Because all local units are part of the Colorado PTA's 501(c)(3), a transgression in this area by one PTA unit jeopardizes all units in the state! If a unit believes that it can reasonably make a financial contribution, it is vital that a vote be held at a unit meeting and the decision be recorded in the minutes.

Rent the Table or the Room

Advocating for PTA's position or passing out literature on ballot issues may be done at school events/on school property only if: 1) A table is rented for passing out literature and/or 2) The room is rented if you are advocating for or against an issue at a meeting. Contact your school or district office for further information and rental details.

Do Not Use School Resources

No school resources may be used for printing, mailing, or distributing literature advocating PTA's position on ballot issues. Literature with PTA's position may be copied at a location off of school grounds and may be mailed or handed out off of school grounds or at rented tables at school events. When mailing literature advocating PTA's position, the mail may be sent only to PTA members.

Educate Voters

As a non-profit organization, PTA's primary role is to educate. But PTA strongly encourages voter participation, since one of the purposes of PTA is to "secure adequate laws for the protection of children and youth," and part of the mission of PTA is to "support and speak on behalf of children and youth in schools, in the community, and before governmental bodies and other organizations that make decisions affecting all children."

The Every Student Succeeds Act (ESSA)



What Does This New Law Mean for my Child?

Now that ESSA has been signed into law, the focus for advocacy turns to effective implementation of the law to ensure every child has the ability to reach their full potential. While this new law provides a great opportunity for states to tailor their education systems to the needs of their students—including the needs of students with disabilities—this new level of authority also requires an increased amount of responsibility for states to ensure they close achievement gaps and meet the needs of all students. National PTA, our constituent associations and advocates across the country will seek to support and empower families to be active participants in the state and local implementation of ESSA to ensure equity and opportunity for all students.



How can I be involved in the implementation process? What can I do?

The U.S. Department of Education is currently in the implementation phase of ESSA. The Department will provide guidance and clarification to states on how best to carry out the new law. You can receive regular updates and information via email from the U.S. Department of Education on the ESSA implementation process.

You are encouraged to reach out to your local school district and state department of education to proactively provide input on implementation efforts. You can also stay up to date with the latest on ESSA at the federal level by **signing up for the PTA Takes Action Network** to receive email updates and action alerts on ESSA implementation and other federal legislation and policy. National PTA is a part of the **State and Local ESSA Implementation Network** that seeks to promote state, local and school decision-making during implementation and collaborate with education stakeholders to provide guidance to the federal government on key implementation issues. We encourage state and local PTA members to establish a similar network of stakeholders to inform implementation at the state and local levels.

Will this new law impact my child this school year?

Portions of the ESSA will begin to be implemented in schools in fall 2016. However, new state accountability systems will need to be created by states over the next year and will therefore not go into effect until the 2017–2018 school year.



How does the new law encourage increased family engagement in education?

ESSA requires school districts to have a written parent and family engagement policy that welcomes all families and seeks to strengthen the partnership between families, the school and the community to improve student outcomes. Each school must also hold an annual meeting with parents and families to explain the curriculum, types of academic assessments used to measure student progress, the state's academic standards and the skills students are expected to obtain and demonstrate.

The law also includes the Statewide Family Engagement Centers (SFECS) competitive grant program. SFECS will help to provide states and districts with the capacity to support effective implementation and enhancement of family engagement policies and initiatives in schools. SFECS must be funded by Congress each year. A key priority for PTA is securing federal investment in the SFECS grant program to make sure states and districts have the resources to increase family engagement in education that support student success.



What does ESSA mean for the classroom instruction my child receives?

The ESSA reduces the high-stakes testing associated with No Child Left Behind (NCLB) and requires students to have access to and receive a well-rounded education, which includes access to core content areas—math, reading and history—in addition to arts and music, foreign languages, technology, engineering, health and physical education.

Does the law require states to adopt certain academic standards, accountability or teacher evaluation systems?

States determine their own academic standards for students, accountability and teacher evaluation systems. The new law specifically expresses that states cannot be required to adopt specific standards—such as the Common Core State Standards—or particular assessments accountability systems or teacher evaluation models.

The Every Student Succeeds Act (ESSA)



What are the testing requirements in ESSA?

Each state must administer annual assessments in mathematics and reading/language arts in grades 3–8 and once in grades 9–12. States must also administer a science assessment once in grades 3–5, 6–9 and 10–12. The law also requires that no less than 95% of all students—or of any group of students—participate in the state assessment.



Will my child's teachers be evaluated based on test scores?

The new law does not require states to establish teacher-evaluation systems, nor that a teacher evaluation system include student test scores. States have the flexibility to create teacher evaluation systems—if they choose—that meet the needs of educators and students in their states.

Does ESSA address an over emphasis on testing?

The law provides resources for the review of state and local assessments to eliminate redundant tests and make needed improvements to accurately measure student growth and achievement and provide valuable information to teachers and parents. States also have the option to set a target limit on the total amount of time students spend taking tests in each grade.

How will I know if my child's school is being held accountable for their growth and achievement?

States have more authority over their accountability systems and school improvement methods in ESSA. States are required to develop plans that feature multiple measures of student growth and

achievement, including performance on required state assessments, school quality and access to opportunities that promote college- and career-readiness. States will have to identify and provide support to schools that are not meeting the state-determined goals for student and school performance.

States must include stakeholders, including parents, in the development of their plans to monitor student and school performance. Over the next several months, your state department of education will be moving forward to engage parents and families in the development of state assessment and accountability systems.

Does the new law provide additional educational opportunities and supports for my child?

The new law helps states, school districts and schools increase their capacity to provide all students with access to a well-rounded education, improve school conditions for student learning and use technology to improve the academic achievement and digital literacy of all students. School districts will have access to resources and the flexibility to use them to address the most pressing needs in their schools, such as bullying prevention, increased access to personalized learning activities, technology or music and arts programs.



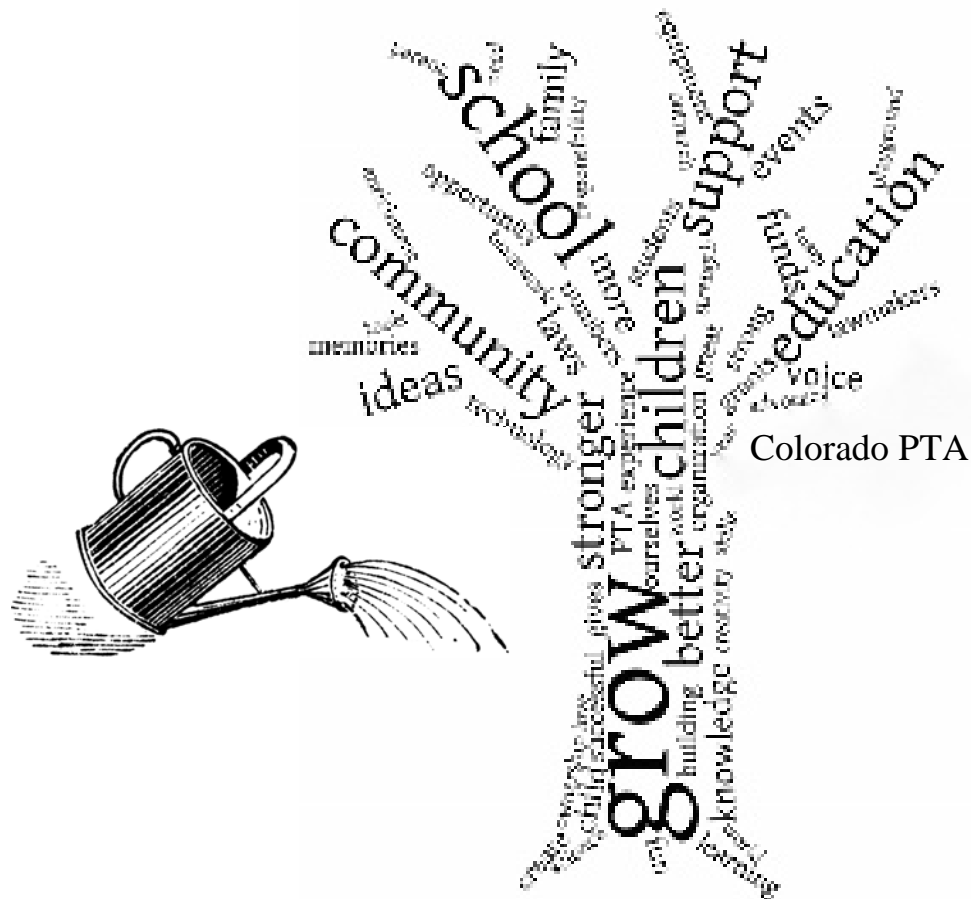
Does the new law allow public funds to be used for private school vouchers?

The law does not include any private school voucher provisions that would divert public funding from public schools.



National Office of Government Affairs
1250 N. Pitt St.
Alexandria, VA 22314
Toll-Free: (800) 307-4PTA (4782)
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PTA.org

“Without continual growth and progress,
such words as improvement, achievement, and success have no meaning.”
~Benjamin Franklin



Nurturing and Growing Our Membership

Membership
Membership FAQs
Business partners
Diversity
Male Involvement
Youth Involvement
Where do your dues go?
Membership benefits
100 reasons to join PTA



every child. one voice.

What a great tagline! Wouldn't it be great to build and strengthen our voices to advocate for our children's education, health, welfare, and safety? Let's get back to the basics of PTA as a grassroots association and increase our membership to strengthen that voice!

Your Colorado PTA Board of Directors knows that strong PTAs start with strong leaders. Take advantage of the leadership training being offered throughout the state. You might be surprised at the amount of information you will learn and contacts you will make! Plus, you are always welcome to invite your Colorado PTA board to visit your PTA/PTSA.

Set your goal

Know previous year's membership numbers (ask your council president, region director, or the Colorado PTA Office if you don't know)

Determine a percentage increase desired. This could be overall percentage or an increase in the number of staff members, students, under represented populations, etc.

Determine a campaign

Theme – have students help; does the school have a focus area for the year that could be tied together

Put Your Heart in PTA

Open Doors for the Future Through PTA

Today's PTA – Making a Difference

Today's PTSA – Tomorrow's Leaders

Events – back to school table, concerts, parent/teacher conferences, drop off/pick up lanes

Read-a-thon – invite the local library to participate

Bike safety rodeo – invite an insurance company or local police department to help out

Boo Hoo Breakfast – invite kindergarten parents to learn about the school – provide facial tissues

Literacy program – invite senior citizen groups

Career Day/Build a Resume – local businesses

Advertising – use your social media, newsletters, bulletin board, email, flyers, website

Evaluating – make sure to track progress throughout the year and make adjustments as needed.

Celebration – what will happen when the goal is met – special assembly/celebrity visit, movie night, books for the library, etc.

Know the value – be able to share with your community why PTA matters

Benefits and services

National, state, and local benefits to the individual member

How has the PTA/PTSA benefitted the school and/or students

Leadership development

Training offered by councils and regions, which helps volunteers feel comfortable in their leadership role. The Colorado PTA Board of Directors *strongly* encourages all officers to complete the appropriate officer training either via the National PTA e-learning courses or in person at a council or region training.

Legislative influence

Presentations for the school community, such as education financing, school policies and procedures, new parent orientation, Colorado Academic Standards, assessments, suicide awareness, anti-bullying.

Why Members Join

School Staff/School Board –

A voice in the legislature – advocating on issues impacting the education of our students

Need for additional funds – offering extras, not funding essentials that should be provided

Parent Engagement – access to materials to help incorporate parents in their children's education

Networking opportunities

Students –

Belonging

Leadership

Citizenship

Non-English Speaking/Under represented –

Understanding of the school system

Interaction with other parents

Opportunity to share their culture and to promote positive community experience

Community Groups –

Increase visibility and accessibility

Shared resources

Opportunity to get involved

Business/Chambers of Commerce –

Positive public relations

Investment in the future

Staff training

Future Parents/Young Parents –

Parenting skills

Understanding school policies

Friendships/socializing

Networking/technology

Leadership skills

Working Parents –

Networking

Providing opportunities to have input into decisions that affect children

Have a voice

Partnership with school administration, staff

Being part of the solution and not the problem

Want to belong

Mayor/Government Officials –

Access to parents

Positive public relations

Opportunity to gauge what issues are important to child advocates



*Our members are the heart of our
association...*

Colorado
PTA[®]
everychild. onevoice.

Membership FAQ

The Membership Report:

- Colorado PTA asks that you submit a membership report twice a year, as a minimum. The deadlines are found on the Membership Report Cover Submittal form.
- The membership report consists of a cover submittal form, a list of members, and payment of dues.
 - o The Cover Submittal Form
 - You will need to gather information from the school office: number of full time staff and the number of students.
 - List the number of individual members you are reporting with this report and which category they would be, i.e. staff, parent, student, or community member. (NOTE: If a staff member is also a parent of a student at your school, count them in the staff category.) After the initial membership report is submitted, the number of members listed in subsequent reports reflects only new members since the last submission.
 - If your PTA/PTSA has business partners, please include the number being submitted.
 - o List of Members
 - This information is entered into a spreadsheet to send electronically to Colorado PTA. If your PTA uses memberplanet to actively manage membership, then no need to email the Membership Listing. The Membership Listing template is available on our website.
 - o Payment
 - Send a check, payable to Colorado PTA, with the cover report to the Colorado PTA address listed on the report. Remember all PTA checks must have two authorized signatures.
 - Only submit \$6.25 per individual member to Colorado PTA. Any additional dues collected remain in your local unit.
 - Include \$10 per business partner being reported.

Membership Resources:

- Back to School PTA Toolkit: Go to www.PTAkit.org to access great tips and tools. The Membership Quick Reference Guide includes:
 - o The Value of PTA
 - o Membership Roles and Duties
 - o Membership Planning for Recruitment & Retention
 - o Membership Engagement
 - o Additional Resources – Join and Renewal Email/Letter templates
- Member Planet for web based membership management, http://copta.memberplanet.com/getting_started.html
- Contact the [Colorado PTA Region Director/Council](#) for support.
- National PTA is offering a new Diversity and Inclusion toolkit. Download it now <http://www.pta.org/diversity>

Business Support:

- Business Partners: Your PTA/PTSA may establish criteria for a business to support your unit and become a partner. The amount collected may vary based on benefits the business receives, such as directory space, ad on a website, flyer at PTA events, etc. (see sample letter and instructions)
- Business Partners can be processed through memberplanet, for assistance with set up, please complete and submit online the request to memberplanet.
<https://memberplanet.com/s/coloradopta/businessforptasetuprequest>

“Business for PTA” Colorado PTA STEPS TO FOLLOW IN OBTAINING BUSINESS PARTNERS

Business Partners

May be in the name of the business or one designated representative
Must be represented by an owner or a manager

Steps in Securing Colorado PTA Business Partners

1. Send the form letter to independently owned businesses in your community.
You may tailor our form for your own needs.
 - You may charge whatever you like for business partners. Colorado PTA recommends that you charge a minimum of twenty-five dollars (\$25). Ten dollars (\$10) must be sent to Colorado PTA to cover the cost of a partner certificate they can prominently display and, the mailing of the certificate. The remaining monies will remain with your local unit to support your PTA projects.
 - **Please charge each business the same amount of dues or clearly define the differences.**
 - Checks should be made payable to your PTA/PTSA.
 - Businesses may donate more than the amount your local unit established for its business partnership.
2. Follow up the letter with a personal visit to each business to explain how their involvement will benefit the children of the community. See if they have any ideas on how you can help, and how they might be able to help your PTA/PTSA. *(Be sure to call in advance to set up an appointment with your contact person.)*
3. Be sure to leave a receipt when payment is made.
4. Record Keeping
 - To receive proper credit for each business partner in your PTA/PTSA, a Membership Report Cover Submittal form **must be sent with the business partner enrollment form(s) or an electronic listing of the business partners emailed to office@copta.org.**
5. Deliver a thank you note to the business within five (5) days of the dues payment. Present the certificate at your PTA meeting or deliver it in person as soon as you receive it from Colorado PTA. **Request that it be displayed where customers can see it.**

Sample Letter to Businesses

(Available electronically by sending an email to office@copta.org)

Date _____

Owner/Manager Name _____

Company Name _____

Address or P.O. Box _____

City, State, Zip _____

Dear _____:

Our PTA/PTSA is launching a special program, "Business for PTA", to encourage business support of PTA and the children of our community. As a business neighbor of [school name], we would like to invite you to become a business partner of _____ PTA/PTSA.

"Business for PTA" is a special class of membership, which promotes a different kind of involvement than traditional PTA memberships. The goal of this program is to create better schools and therefore a better education for the students in the community.

Many school districts with dwindling budgets are using all the resources at their disposal just to try to make ends meet, and they need help. We feel that PTA and your business can provide substantial help, by jointly taking their concerns to school boards, legislators and other policy makers who can influence education reform.

Together we must insist that schools provide well-educated students who are ready for the work force. This should be of vital concern to employers everywhere; inadequately trained employees are a financial drain on any company.

We would like for you to join us and over 22,000+ PTA members in Colorado to improve the quality of education. Your business partner will help in two ways. First, you can help strengthen our child advocacy efforts to reform education values and standards. And, closer to home, help us promote the welfare of our children through special programs and projects not available with our school's limited budget.

You will receive invitations to PTA sponsored events, plus recognition at these events, and in our school newsletter. We will share with the community your support of this coalition, and together we can show how solutions can be forged with business and education partnerships.

[Your local unit PTA/PTSA name here] is looking forward to establishing a lasting relationship with **[name of company]**.

Sincerely,

PTA/PTSA President

Membership Chairperson

Principal

"Business for PTA" Colorado PTA Business Partner Enrollment Form

Date _____

Business Name _____

Type of business _____

Represented by _____

Address _____

Phone: _____ E-mail _____

Signature _____

Amount of dues remitted to _____ PTA/PTSA

\$ _____. Partnership expires one year from date paid. Renewal ☐ New ☐

----- OUR PTA is 501(c) (3) NON PROFIT. BUSINESS PARTNERS ARE TAX DEDUCTIBLE -----

For PTA/PTSA use only:

Date received _____ Amount received \$ _____

Amount to be remitted to Colorado PTA - \$ 10.00

Amount to be used by _____ PTA/PTSA

for projects or programs to benefit the children of the school \$ _____.

Improve Diversity to Make a Stronger PTA

PTAs everywhere must understand and embrace the uniqueness of all individuals, appreciating that each contributes a diversity of views, experiences, cultural heritage/traditions, skills/abilities, values and preferences. When PTAs respect differences yet acknowledge shared commonalities uniting their communities, and then develop meaningful priorities based upon their knowledge, they genuinely represent their communities. **When PTAs represent their communities, they gain strength and effectiveness through increased volunteer and resource support.**

The recognition of diversity within organizations is valuing differences and similarities in people through actions and accountability. These differences and similarities include age, ethnicity, language and culture, economic status, educational background, gender, geographic location, marital status, mental ability, national origin, organizational position and tenure, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

Therefore PTAs at every level must:

- Openly assess beliefs and practices to assure inclusiveness and guard against discrimination;
- Make every effort to create a PTA board and membership that is inclusive and reflective of its community;
- Encourage that all PTA activities at the school be planned by a committee which is representative of the population.

When people find themselves “the only one” of their kind at the first meeting they attend, they’re much less likely to stay involved. Visit our website, <http://copta.org/diversity-inclusivity/> for suggestions and ideas for creating an inclusive PTA where people feel welcome and want to stay involved. Download the National PTA’s Diversity and Inclusion Toolkit, <http://www.pta.org/diversity>

Having a diverse organization is a wonderful opportunity to learn from each other while impacting positive change in a community. A unified assembly of diverse individuals is one way to provide inclusiveness in decision making and representation to engage, educate, and equip new members to get involved in PTA initiatives and activities. When leadership and committees reflect their communities, they are more likely to receive “buy-in” from the community and; therefore, are more likely to have a higher probability of support and success with their initiatives.

Male Involvement

Men are often times nervous to get involved at school for any number of reasons. I have worked with a lot of schools and found some common ways to break down barriers and get more men involved.

First you need to ask yourself is your school environment welcoming to dads and other men? This can be very hard to determine since often times PTA officers are so comfortable in the school. Here are a few key things to look for:

When you walk up to the school, is it obvious how to get in?

When you first walk in the door, is it clear where the office is to sign in?

When a man walks in that people don't know, is there suddenly tension? Often times people think men only come into the school when something is wrong, so school staff can be on the defensive. Men don't want to look like they don't know what they are doing, so then if they feel unwelcome they get nervous. Men don't want to admit they don't know where their kids' classrooms are. If the school administration is on the defensive this can create a very uncomfortable interaction for both parties.

Making sure you have a welcoming environment will go a long way to getting more men in the school. Keep in mind their first visit will help set the tone on if they will come back or not. If it went well they will likely be back, if it went poorly then it is a lot harder to get them back in. Here are some great and simple ways to make sure that first interaction goes well:

Have a male specific event. Put signs up making it easy for everyone to know where to go - this removes a lot of tension.

Have someone greet them as they walk into the room.

Men don't want to go to more meetings, but they do like to do stuff with the kids. So have a clear plan of what you are going to do and make it appealing to them.

One of my favorites is to run a breakfast before school event such as All Pro Dad:

- The men tell kids why they are proud of them.
- As a group you talk about the topic of the month (could be what does integrity mean to a 1st grader, how to handle bullies, etc.).
- There is a challenge for the month and prizes are awarded.
- The kids show where their classroom is and they get to meet the teacher.

It doesn't sound like much but the effect is profound. In an easy non-threatening way you have just overcome three things that can easily prevent men from coming to school or coming back. The men now know how to get into the school, where his kid(s) classroom is, and has met the teacher. This program also gives them some male bonding time which shows them it is ok to be in the school.

Another great way to get men involved is to contact your local Home Depot and ask if they will donate some of their kids building kits. They like to do this and will help run a Home Depot workshop at your school for free. If you need props or games built for a carnival or school play ask the men – most men love to build stuff.

If you are looking for other ideas or need some help getting a program off the ground, we have a wealth of information on ways to get men involved. We, also, know a lot of ways to remove barriers like funding, providing help or ensuring the program appeals to the men. Please visit our website, <http://copta.org/male-involvement/>. We would love to hear from you, please contact, maleinvolvement@copta.org with your questions, ideas, or success stories!maleinvolvement@copta.org



Youth Involvement in PTA

Youth involvement includes a commitment by a PTA to actively engage students in the work of the association. Parents, teachers, and students are dedicated to work as a team to train youth to be future advocates, community leaders, and responsible adults. Colorado PTA encourages and supports student participation in PTA/PTSA leadership, events, and programs.

WHAT TO DO

- Form a student involvement committee whose membership includes students and adults.
- Survey the school community to find out what type of activities will encourage student involvement.
- Develop a plan for student involvement based on survey results.

Set reasonable goals based on what the unit needs to accomplish.

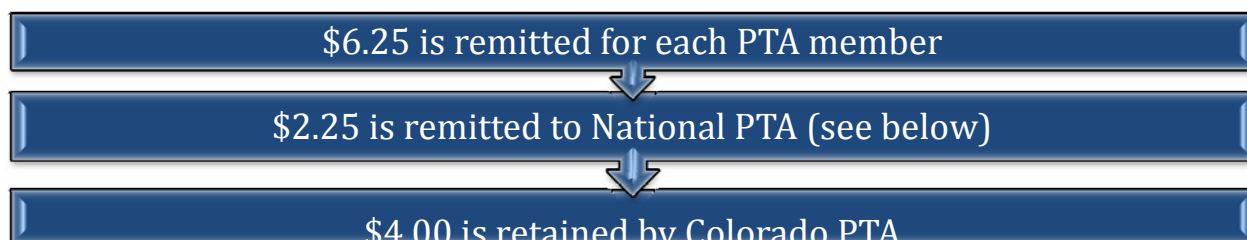
- Solicit input from youth about budgetary and policy proposals that affect them.
- Link youth involvement opportunities to existing local government, school, and state programs that promote voluntary civic and community service.
- Encourage legislative bodies at all levels of government to include local youth in their policymaking efforts.
- Encourage schools and community programs to provide meaningful opportunities for youth to participate in planning and implementation.
- Instill in youth a sense of civic responsibility, citizenship, and leadership through active participation.

STUDENT MEMBERS

Upon payment of dues, students are considered full members with the same privileges, responsibilities, and credibility:

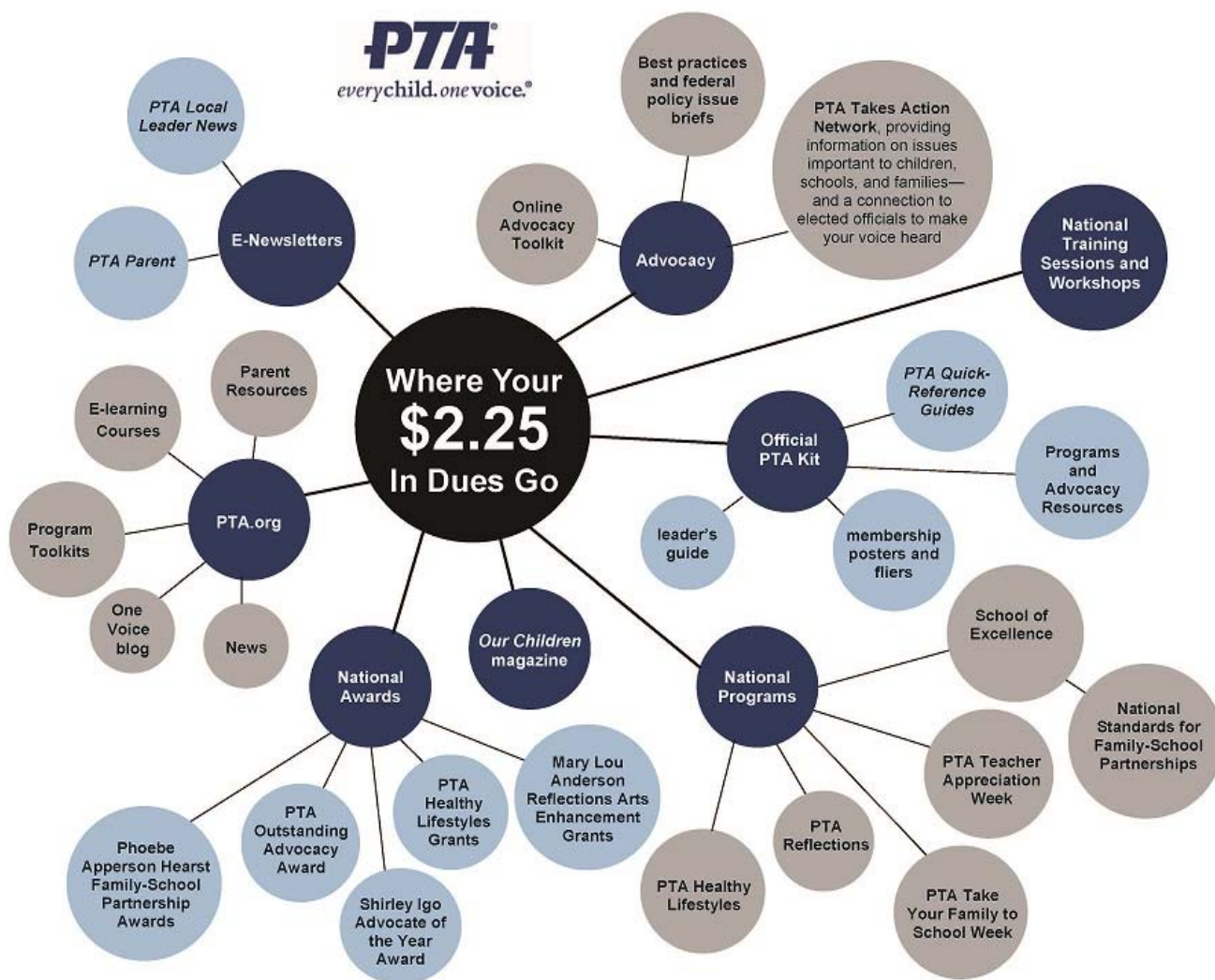
- Students who are willing and have the time may serve as committee members of the PTA/PTSA. Colorado law prohibits students from serving in a position with fiduciary accountability. Therefore, youth may not serve as officers, or on the board of directors of a PTA/PTSA.
- Keep open lines of communication.
- Respect all opinions.
- Consider student opinions seriously.
- Practice effective communication and listening skills.
- Seek input from all students– not just those who traditionally are seen as “leaders.”
- Be prepared for students to have an active voice in the PTA/PTSA.
- Students deserve to be recognized and rewarded for their contributions to PTA/PTSA. A system of recognition and awards creates a climate of respect and value for PTA involvement and motivates students to continue their hard work and dedication to PTA/PTSA. For this to be effective, fair criteria must be developed. For example, students should be rewarded for leadership, vision, and dedication using the same criteria for all volunteers.

Where Do Your Dues Go?



\$1.00 of the Colorado PTA dues is returned to your Council to provide training and support.

If you do not reside in an area with a Council, all dues are retained at Colorado PTA to provide support through your Region Director.



Save Money with Member Benefits Providers

Whether you're buying school supplies for the kids or renting a car for your next family vacation, PTA members can save money on everyday purchases thanks to National PTA's Member Benefits Provider Program. National PTA teams up with businesses committed to supporting PTA's mission of serving all children by offering our members special discounts, fundraising opportunities and other unique deals.

Please visit www.PTA.org or www.ptakit.org to get the latest members' benefits providers.

100 Ways to Increase PTA Membership



Many of the following ideas were submitted by Colorado PTA local units that were successful in increasing membership.

1. Just ASK!
2. Set a goal AND put it in writing.
3. List ways parents/community members can help.
4. Give a small speech at Open House, Back to School Night, Orientations, etc.
5. Members receive a free school/student directory.
6. Include a volunteer sheet in folders or mailings.
7. Be visible.
8. Invite teachers to join. Put info in their box why PTA needs to keep the "T" in PTA.
9. Establish a good relationship with the principal and staff.
10. Display a poster with PTA's accomplishments.
11. Put out a mass e-mail encouraging families to get involved and join the winning PTA team.
12. Use the membership toolkit in the back-to-school materials sent to local unit presidents from the National PTA.
13. Solicit local businesses for items to use for drawings, which are for members only.
14. Focus on filling committees and committee chairs with new PTA parents.
15. Establish a program such as "Compadres" in which 50% English speaking parents meet with 50% of the Spanish-speaking parents.
16. Hold a contest between classes or grade levels.
17. Keep visuals out throughout the year to show progress toward your goal.
18. Put information about your PTA's goals and the membership drive in the front display case or bulletin board.
19. Make personal contact. Make phone calls. Talk to parents at the playground or while waiting to pick up kids after school.
20. Ask businesses to extend discounts to PTA members when they show their card.
21. Let the community know what PTA has done to help the children.
22. Have free stuff to give away at student registration.
23. Develop a "tickets for time" booklet to let parents choose what things they want to help out with.
24. Change the way things were done in the past. Everyone likes to mix it up a little to keep events from being routine and boring.
25. Have a "dads' club" to encourage men to participate in the children's education.
26. Create a "special needs" committee to focus on issues dealing with needs from special needs to gifted and talented.
27. Encourage participants in the Reflections Program to join PTA.
28. Publicize success. People want to be associated with a successful group.
29. Have a membership table at registrations, back to school nights, open house, and PTA sponsored events.
30. Create a welcome letter to let parents know what PTA does for the school and their children. Create one to welcome families back at the beginning of the year, as well as one to welcome families mid-year.
31. Thank your new members by name each month in the newsletter.
32. Offer a pizza party for each teacher team that joins. Make sure there is a sign in the lounge to let other teams know how you appreciate the support.
33. Have a member tree in the front hallway that has the members on the leaves (name on leaves) and teacher members are the apples on the tree.
34. Have PTA shirts and/or name tags for the board so new parents and staff know who to ask for info about getting involved.
35. Have membership forms available at all events.
36. Host a program in conjunction with your meetings to encourage parents that aren't members to attend.
37. Have a membership drive for students.
38. Coordinate a "new family social" with the first general meeting.
39. Create a theme to help the visibility. For example, if a pizza party is an incentive, put a pizza pan outside the classroom door (or other visible location). When they reach a certain number add crust, sauce, cheese, toppings. The final topping could be an anchovy, representing the teacher member.
40. Ask the principal to encourage the staff to join. Don't forget to thank those who join.
41. Give a free homework pass to PTA members' student.
42. Be present at Kindergarten Roundup, transition nights to the high school or the middle school.
43. Offer a discount to dances for student members.
44. Offer a discount for PTA members on table rentals at your Bazaar/Craft Sale.
45. Have flyers ready to give those wanting to know where the PTA money goes.
46. For senior registration, let seniors know they should join if they are interested in applying for the PTA scholarship in the spring.
47. Create a scrapbook or have a table displaying clippings from the local paper of some of the endeavors your PTA had. This will also lay the groundwork when applying for grants from your district's education foundations.
48. Display items your PTA has provided for the school or have a picture of them.
49. Offer parent education workshops such as helping your student with homework, teen driving, drug awareness, developmental changes in your middle school student, internet safety, etc.
50. Invite community members outside the school to join, such as school board members, superintendent, teacher union representatives, state legislators, etc.
51. Display your wonderful work at the county fair, in a local parade, at a community event at the mall, etc.
52. Sponsor kid games for children to participate in.
53. Spread your mission with the help of the media. (Use the tools provided by National PTA to create flyers and posters.)

54. Put together a back to school dinner. Perhaps a local restaurant would cater for free or reduced cost. Decide whether to charge for dinner. Cost could include membership, as long as the individual agrees to be a PTA member.

55. Offer a teacher luncheon if they all join PTA.

56. Offer a staff luncheon if the entire staff joins PTA.

57. Share with the principal your goal for 100% faculty and staff participation.

58. Reach for the stars and put member's names on stars on a poster or hanging from the ceiling. Stars could be color coded to represent parents, teachers, student, and community members.

59. Participate in the PTA "Three for Me" program. Go to www.three4me.com to get started.

60. Give PTA members an extra bingo card or door prize ticket at your Bingo Night.

61. Challenge your members to ask other people to join.

62. Have PTA info available at parent/teacher conferences.

63. Put up a sign-up board in May, with volunteer opportunities for the following school year. Bring it back to the open house/back to school nights.

64. Put a "personal invitation" in the back to school mailing.

65. Balance meetings with Family Fun Nights and programs.

66. Have a membership contest with the winning class winning a magic show. Place paper hats outside the class and each time they get a new member, place a bunny on the hat.

67. Remind people that only members are entitled to vote on PTA issues, such as how the hard earned money is spent.

68. Have a collection box in the school office with membership envelopes near it, to make it easy to join.

69. Sponsor coffees in the morning following an evening meeting to communicate to those who were unable to attend.

70. Publicize your meeting times and dates as many ways as possible: student folders, newsletters, e-mail, auto-dialer, bulletin board, website, and word of mouth.

71. Make sure meetings are casual and welcoming. Have a greeter welcome new people who attend.

72. Invite the Reflections Program local winners to a dinner meeting. Invite them to join if they aren't already members.

73. Invite the custodial staff to your meeting and publicly thank them for their efforts.

74. Join with other school groups (student council, honor society) for activities during Teacher Appreciation Week.

75. Support the students by listening to their ideas. Man a coat and backpack check at dances.

76. Have membership drawings throughout the year.

77. Have an interpreter at all meetings.

78. Encourage an enthusiastic person to be a volunteer coordinator.

79. Conduct surveys to find out likes and dislikes from members.

80. Publicize events PTA sponsors and grants received.

81. Display winning Reflections entries in municipal building, banks, libraries, or other visible locations.

82. Hold information nights on legislative issues affecting public education.

83. Go to www.pta.greatideabank.org for ideas from other PTAs around the country.

84. Enter your members into the OMDR database to allow quicker more efficient communication.

85. Prepare radio and TV spots about PTA. Perhaps your high school would do this as a class project.

86. Have a PTA bulletin board.

87. Ask to have a space to leave copies of your newsletter for visitors to see.

88. Have a poster or slogan contest for students for membership.

89. Make sure to have a copy of the PTA budget available so everyone knows how the money is allocated and helps children.

90. See if the local store will allow stickers or printing of PTA info.

91. Tell your PTA story with specifics on what PTA has done for your child's education.

92. Have a quiet homework area for kids during PTA meetings.

93. Plant a flower bulb for each member in a prominent location and watch it flourish.

94. Provide plastic badge holders for members to "wear" their membership card at meetings.

95. Use familiar street signs as an attention getter. PTA membership "yields" results (draw a yield sign). "Stop" (draw a stop sign) and consider the benefits of PTA. There's only "one way" to get all the support you need. "Do not pass" this opportunity to be a member of an organization as strong as PTA!

96. Get straight As from the PTA...Action, Activities, Answers, Acquaintances, Advice, and Accomplishments!

97. Cut up a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.

98. Hold aerobics or exercise classes for PTA members.

99. Ask local realtors to include a "PTA welcomes you to the neighborhood" to their new buyers.

100. Make PTA a household name.

Thanks to the following PTAs for their input:
Academy Endeavour PTA, Akron PTSA, Appleton PTA, Bates PTA, Bear Canyon PTA, Carlson PTA, Castle Rock PTA, Coronado E.S. PTA, Elbert PTA, Escuela Bilingue Pioneer PTA, Evergreen H.S. PTSA, Falcon H.S. PTSA, Falcon M.S. PTSA, Ft. Lupton PTSA, Fremont PTA, Holmes PTSA, Madison PTSA, Marshdale PTA, Martensen PTA, Parr PTA, Remington PTA, Ridgeview PTA, Rooney Ranch PTA, Ryan PTA, Skyview PTSA, South Lakewood PTA, Steele PTSA, Thimmig K-8 PTA, Twombly PTA, Westerly Creek PTA, West Woods PTA, Wingate PTA, and the Washington State PTA.

Branching Out With Programs

Reflections
Health, Wellness, and Safety
School of Excellence
Science, Technology, Engineering, Mathematics
Additional National PTA Programs
Generational Decoding
List of Acronyms



Living with fear stops us from taking risks,
and if you don't go out on the branch,
you're never going to get the best fruit.

-Sarah Parish



National PTA Reflections®

REFLECT on the theme. CREATE an original work. BE RECOGNIZED!

Since 1969, the Reflections program has encouraged millions of students across the nation and in American schools overseas to explore their artistic talents by creating works of art for fun and recognition. Annually, hundreds of thousands of students participate in the Reflections program through their local PTAs. Students in preschool through grade 12 are encouraged to submit works of art in six categories:

**Dance Choreography • Film Production • Literature
Musical Composition • Photography • Visual Arts**

Local winners in each category go on to compete at the district/region and state levels. State winners are then considered for a National PTA Reflections award, including:

- **Outstanding Interpretation Awards**
- **Awards of Excellence**
- **Awards of Merit**

Special Artist Division

The Special Artist Division is an optional division of the National PTA Reflections Program for students whose physical, cognitive, or mental health challenges meet ADA guidelines. For complete guidelines and rules, please visit <http://copta.org/parent-engagement/reflections/>.

To start a PTA Reflections program in your school community, email the state office for instructions and materials. Visit our website to guide your PTA/PTSA and make your Reflections program a success.

<http://copta.org/parent-engagement/reflections/>

Take the Reflections Leader e-learning course to walk through a step-by-step process for engaging students, parents and educators in Reflections while learning about resources and tools provided by your State PTA and National PTA.

- Contact the state office for specific dates, forms and additional information.
- Kick-off your program with National Arts in Education Week.
- Consider the PTA National Standards for Family-School Partnerships to ensure your Reflections program meets its intended potential.

Theme Search Contest

National PTA sponsors a student-focused National PTA Reflections Theme Search Contest annually to determine a theme for the next year. The winning theme is announced at the National PTA Convention and Exhibition.

For more information or assistance, let us know!

Reflections@copta.org

Health, Wellness, and Safety Liaison

A Health, Wellness, and Safety Liaison works with an already established school wellness team or helps to recruit interested parents, school staff, and community members and gives them the authority within the PTA framework to work on school wellness initiatives.

Why: -Because good mental and physical health is linked to learning ability and because good health is a critical predictor of future productivity, it is essential that all schools provide students with access to learning environments that support healthy lifestyles. But schools cannot be expected to do this alone. They need your help.

How: To add a Health, Wellness, and Safety Liaison to your local PTA:

1. At the next regular Board meeting, make a motion ("I move to create a Health, Wellness, and Safety Liaison.")
2. A member must second the motion.
3. If a majority of the PTA members present at the meeting approve this motion, you have a Health, Wellness, and Safety Liaison.
4. The president appoints a Health, Wellness, and Safety Liaison, subject to approval of the board.

If your PTA has Standing Rules, they can be amended by your PTA's membership to reflect the Board's action on the addition of a Health, Wellness, and Safety Liaison.

Health, Wellness, and Safety Liaison Job Description

Job Titles: Health, Wellness, and Safety Liaison (*Formerly the Health, Wellness and Safety Chair.*)

General Summary: The Health, Wellness, and Safety Liaison's role is to connect PTA members to school, district, and community resources including educational opportunities that support health and safety at schools and healthy lifestyles for students and families. Serves as a liaison between the PTA and any school, district or community efforts related to health, wellness, and safety, such as a school wellness team. May simply serve as the point person for resources and educational opportunities or may lead school wellness efforts, depending on the interests and capacity of the PTA and the school community.

Note: A **Health, Wellness, and Safety Liaison** is a position that can be filled by **any person** who has a genuine interest in these areas.

Key Responsibilities:

- Help to foster a vision for student health, wellness, and safety that is tied to the school goals, and school or school district health, wellness, and safety policy.
- Form a Health, Wellness and Safety (HWS) team (if one doesn't already exist at the school)
- Work closely with the PTA leadership and school administration and district to ensure that efforts are aligned and coordinated.
- Support the development of partnerships that support health, wellness, and safety.
- Connect to resources, training and funding opportunities that support the goals of the team.
- Become familiar with the Health, Wellness, and Safety resources and opportunities provided by the National PTA and Colorado PTA.

Optional: Provide the Colorado PTA Health, Wellness, and Safety Committee with an annual update of school activities so that successes may be shared and recognized.

Required: Interest in promoting childhood health, wellness, and safety.

Health, Wellness & Safety Committee

PARENT INFORMATION SHEETS AT A GLANCE

- 1 ALLERGIES – FOOD ALLERGIES
- 2 ALLERGIES – INTRODUCTION TO ALLERGIES
- 3 BULLYING
- 4 CHILD ABDUCTION
- 5 CHILDHOOD OBESITY: WHAT SCHOOL COMMUNITIES CAN DO *
- 6 CYBERBULLYING
- 7 DISASTER PREPAREDNESS
- 8 DISTRACTED DRIVING – DRIVING DISTRACTED WITH CHILDREN
- 9 DISTRACTED DRIVING – TEENAGERS: DISTRACTED BEHIND THE WHEEL
- 10 DISTRACTED DRIVING – TRAFFIC SAFETY FOR KIDS: SCHOOL ARRIVAL & DISMISSAL
- 11 DISTRACTED WALKING – DANGERS OF WALKING DISTRACTED
- 12 E-CIGARETTES: DANGERS TO CHILDREN & YOUTH; USE WITH THC OIL
- 13 FACTS ABOUT CONCUSSIONS
- 14 GETTING A HEAD START: KEEPING YOUR CHILD’S TEETH HEALTHY
- 15 HEALTH & WELLNESS
- 16 THE HEALTH OF COLORADO HOMELESS CHILDREN
- 17 HOW TO CREATE A HEALTHIER SCHOOL FOOD CULTURE *
- 18 HUMAN PAPPILLOMAVIRUS INFECTION & VACCINE AWARENESS
- 19 HUMAN TRAFFICKING OF CHILDREN IN THE UNITED STATES
- 20 IMMUNIZATION AWARENESS
- 21 IMMUNIZATION INFORMATION FOR COLORADO PARENTS
- 22 IMMUNIZATION - MEASLES
- 23 INTERNET SAFETY: WHAT PARENTS NEED TO KNOW
- 24 KEEPING KIDS SAFE WHEN GUNS ARE IN THE HOME
- 25 MARIJUANA – EFFECTS ON ADOLESCENTS (BRAIN DEVELOPMENT)
- 26 MARIJUANA – KEEPING KIDS SAFE FROM EDIBLE PRODUCTS
- 27 REUNIFICATION OF PARENTS & STUDENTS DURING AN EMERGENCY **
- 28 SMART SNACKS – IMPLEMENTING SMART SNACKS IN YOUR SCHOOL
- 29 SMART SNACKS – FACTS ABOUT SMART SNACKS IN SCHOOLS
- 30 SUBSTANCE ABUSE
- 31 SUICIDE PREVENTION
- 32 SUN EXPOSURE: HOW TO PREVENT DAMAGING EFFECTS TO CHILDREN
- 33 SYNTHETIC & DESIGNER DRUGS
- 34 TEEN DRUG AND ALCOHOL ABUSE
- 35 TEEN PRESCRIPTION DRUG ABUSE
- 36 YOUTH MENTAL HEALTH

(* In collaboration with Colorado Action for Healthy Kids)

(** Reunification: In collaboration with Standard Response Protocol –
i love u guys Foundation)



STEPS to Excellence!

National PTA School of Excellence is a recognition program that supports and celebrates partnerships between PTAs and schools to enrich the educational experience and overall well-being for all students.

As a **National PTA School of Excellence**, families feel welcomed and empowered to support student success, and PTA is a key partner for continuous school improvement.

The path to excellence starts with a joint commitment of PTA and school leaders to work together to achieve PTA's National Standards for Family-School Partnerships.

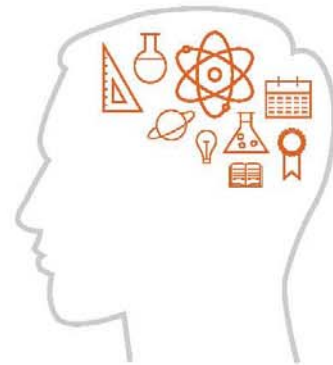
Through the School of Excellence program, your PTA and school will gain new ways to engage families in school decision-making, such as improvements to programs, practices and policies related to education, health, safety or the arts. Contact excellence@pta.org or call (800)307-4782 for more info.

- ___ 1. Enroll for program by October 1st
 - a) Visit www.pta.org
 - b) Select School of Excellence under At School link
 - c) Click on Enroll Now button
 - d) Enter Local Unit info (If you need your ID #, please contact your [region, council or state office](#))
 - e) Receive your Getting Started Guide
- ___ 2. Survey school community, submit Family-School Partnership Scan by November 1st
 - a) Visit www.pta.org/excellencetools
 - b) Download Family Survey and School Leader Questionnaire
 - c) Have school community complete Family Survey (can be paper or online)
 - d) Have principal complete School Leader Questionnaire
 - e) Compile results of surveys
 - f) Select one goal and a specific objective to work on throughout the school year (these are listed on the Family-School Partnership Scan)
 - g) Complete and submit Family-School Partnership Scan to National PTA found at www.pta.org/excellencetools
- ___ 3. Receive “Roadmap to Excellence”, use as a guide to improving Family-School Partnerships. Work towards achieving goal/objective listed on Family-School Partnership Scan.
- ___ 4. Complete the National PTA School of Excellence Application by June 1st
 - a) Complete a follow-up survey of the school community (use the same survey as #2, may be paper or online)
 - b) Have principal complete a follow-up school leader questionnaire
 - c) Compile results of surveys
 - d) Write essay describing activities of unit and providing details of how goal/objective was achieved

CELEBRATE YOUR SUCCESS!

WHY STEM *PLUS* FAMILIES?

STEM careers in the United States are growing twice as fast as any other profession. This exponential growth has created a situation in which the demand for qualified STEM professionals is high, but the supply of STEM workers to fill these positions is low, especially among underrepresented groups like minorities and women. Parents and families have a very important role to play in closing the STEM gap, since they are influencers of students' perceptions of what is possible for their future.



OUR VISION

All students have the family and community support necessary to access and pursue STEM opportunities and careers.

OUR GOAL

Increase access to STEM education and careers, especially among unrepresented youth, by developing, evaluating and sharing effective ways to inform and engage families in STEM experiences, while working with our partners to improve access to STEM school and community learning environments.

STRATEGIES

LEAD

1

Lead a collective impact approach to engaging families in STEM by inspiring educators, STEM professionals, community organization and private/public entities to develop strategies to engage families in school and community settings and share research findings about effective practices.

MOBILIZE

2

Mobilize schools and communities to engage families in STEM experiences and improve STEM learning environments by providing resources and support to enable local efforts.

BUILD

3

Build awareness about STEM education and career opportunities by educating families about the career opportunities available in STEM fields, as well as ways to influence and support their students' education and career decisions.



OUR DESIRED OUTCOMES

RESEARCH

A body of research demonstrating effective ways to engage families in STEM

AWARENESS

Increased awareness about STEM opportunities and the ways families can influence students' academic and career pathways to STEM fields

COMMUNITY

An active community of individuals, organizations and private/public entities that commit to encouraging family and community engagement in STEM and to sharing best practices and lessons learned

ONLINE

An online hub for sharing program models, proven strategies, research findings, evaluation tools and other resources for family and community engagement in STEM

EXPERIENCES

100,000 STEM experiences for families generated by June 2018

ADVOCACY

Improved school and community resources for STEM



TAKE THE STEM PLUS FAMILIES PLEDGE

Visit PTA.org/STEM and join a collaborative community that is committed to making a collective impact on increasing family engagement in STEM.

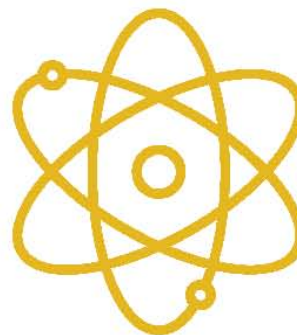


Join the conversation on social media with **#PTA4STEM**

FOUNDING & PRESENTING SPONSOR



FOUNDING SPONSOR



Programs Galore!

Take Your Family to School Week. National PTA's Take Your Family to School Week, sponsored by the AXA Foundation, encourages PTAs and school leaders across the country to open their doors to families so that they are engaged in their children's education and overall well-being. Local PTAs will host family-focused events throughout the week. Grant availability will be posted on [www.PTA.org/awards](http://www.pta.org/awards) and post - See more at: <http://www.pta.org/programs/familytoschool.cfm?ItemNumber=3262&navItemNumber=5106>

Parents' Guides to Student Success. Developed in response to the Common Core State Standards, these guides provide families with grade-specific information about the key items that children should be learning in English, language arts and math. The guides also include activities for families to do at home to support learning, as well as methods for helping parents to build stronger relationships with their child's teacher. For high school grades, the guides also provide tips for planning for college and career. - See more at: <http://www.pta.org/parentsguides>

Healthy Lifestyles. Nearly one in three American children is overweight or obese. Children who are obese miss more school than others and risk devastating health problems such as heart disease, diabetes and cancer. PTA's Healthy Lifestyles program provides family-centered education and tools to empower families to partner with schools and advocate for healthy changes around nutrition and physical activity, and to create an environment at home that supports the positive changes happening at school. National PTA partners with a number of organizations to connect you to the best resources and advocacy tools available to prevent childhood obesity. - See more at: <http://www.pta.org/healthylifestyles>

Fire Up Your Feet. Power Up Your Day! National PTA is partnering with Safe Routes to School National Partnership and Kaiser Permanente on Fire Up Your Feet, a program that encourages families to walk more to and from school—and in daily life—while keeping track of their steps. PTAs may also access the tools available to turn this program into a healthy fundraising option. Fire Up Your Feet helps PTA members live healthier, connect with their families, and raise money to improve their schools. - See more at: https://www.google.com/url?qhttp://www.ptakit.org/Uploadeddocuments/2014BTSDVD/PTA-Savings/Savings-Safe-Routes.pdf&sa=U&ved=0ahUKEwiTrcf1sMjVAhWBz4MKHXptArQQFggEMAA&client=internal-uds-cse&usg=AFQjCNF3KgIWE8V-iN_YUfl3yFdkO3kdMA

Mary Lou Anderson Reflections Arts Enhancement Grants. At the end of each academic year, National PTA issues a request for proposals to PTA/PTSAs that want to take arts education to the next level. A limited number of matching grants of up to \$1,000 are awarded in the fall to PTA/PTSAs providing in-school and afterschool programs to enhance arts education. PTAs serving at-risk student populations are particularly encouraged to apply.—See more at: <http://www.pta.org/programs/content.cfm?ItemNumber=3101>

PTA Family Reading Experience, Powered by Kindle is a program that helps children become better readers and helps foster the love of reading through a set of free literacy activities that are fun for the whole family. Includes a set of free activities and tools in English and Spanish your PTA can use to organize events that engage the entire family in improving reading skills for students between kindergarten and fifth grade. See more at: <http://www.pta.org/programs/content.cfm?ItemNumber=4329>

For more information on National PTA programs, visit www.ptakit.org

Additional Resources and Information

National PTA	Website: www.pta.org Facebook: https://www.facebook.com/ParentTeacherAssociation Twitter: @NationalPTA
Colorado PTA	Website: www.copta.org Facebook: https://www.facebook.com/ColoradoPTA Twitter: @ColoradoPTA
Denver Council PTSA	Website: www.dcptsa.org Facebook: https://www.facebook.com/pages/Denver-Council-PTSA/243628949008037?fref=ts
El Paso Council PTA	Website: www.epcpta.org Facebook: https://www.facebook.com/EPCPTA Twitter: @EPCPTA
Jefferson County Council PTA	Website: www.jcpta.org Facebook: https://www.facebook.com/JeffcoPTA Twitter: @JeffcoPTA
Thompson Council PTA	Facebook: https://www.facebook.com/thompsoncouncilpta.org/ Twitter: https://twitter.com/PTA_Thompson Instagram and Pinterest: ThompsonCouncilPTA

PTA e-learning series: <http://www.pta.org> -> PTA Leaders -> [e-learning](#)

- | | |
|--|--|
| -PTA Basics* | -Parliamentary Procedure |
| -Effective Advocacy for Your Child | -Planning Your PTA Year |
| -National Standards for Family School Partnerships | -Preventing Theft in Your PTA |
| -Board Basics* | -Reflections Leader Training |
| -Local Unit President* | -Running a Successful Program |
| -Local Unit Secretary* | -Writing and Proposing PTA Resolutions |

-Local Unit Treasurer

-Membership Basics

-Creating and Delivering a Speech

-Cultural Competency

-Ethical Leadership

*Available in Spanish

PTA Back-to-School Kit: www.PTakit.org *****Exclusively Online!*****

AIM insurance PTA Guide: www.aim-companies.com -> Resources -> [PTA Insurance Guide](#)

National PTA Diversity Toolkit: <http://www.pta.org/diversity>

Healthy Lifestyles Leadership Guide:

<http://www.actionforhealthykids.org/what-we-do/parents-for-healthy-kids>

GENYOUth Foundation Wellness Impact Report: <http://www.genyouthfoundation.org>

Generational Decoding

Did you know that there are currently *FIVE* generations in our work and volunteer force? Each generation has unique values and experiences that shape their work style. Learning about our differences can help us to more effectively work together!

The Traditional Generation

- Born pre-1945
- 8% of the workforce
- Train them one-on-one
- Many are volunteers, give them a job title
- #1 Complaint: No one asks their opinion
- *Remember: Old dogs can still have treats to share

Baby Boomers

- Born 1946-1964
- 30% of the workforce
- Over 70% will stay on past retirement age
- Work well with others, help them make a difference
- #1 Complaint: Age discrimination
- *Remember: They brought you into this world and they can take you out

Generation X

- Born 1965-1980
- 17% of the U.S. population
- Tell me what you want, give me the tools, leave me alone
- There is an "I" in TEAMWORK?
- #1 Complaint: Office politics
- *Remember: Micromanage them and you'll lose their loyalty

Generation Y

- Born 1981-1995
- 25% of the U.S. population
- No news is bad news, feedback is essential
- Technology allows work and personal life to overlap
- #1 Complaint: Hearing you say, "when I was your age"
- *Remember: They can't imagine being as old as you

Linkster/Millennial Generation

- Born after 1995
- 18% of the world population
- Ask them to reverse mentor older team members
- Give structure and opportunities to interact with full-time employees
- #1 Complaint: Being grounded
- *Remember: Most of them are still in school, so work with their schedules, they are our future



LIST OF ACRONYMS

ABE – Arts Business and Education Consortium
AFHK – Action for Healthy Kids
CASB – Colorado Association of School Board
CASE – Colorado Association of School Executives
CCHE – Colorado Commission on Higher Education
CCSEA – Colorado Classified School Employees Association
CCSSI – Common Core State Standards Initiative
CDE – Colorado Department of Education
CDOT – Colorado Department of Transportation
CLASS – Children's Land Alliance Supporting Schools
COPTA – Colorado Parents Teachers Association
CSSRC – Colorado School Safety Resource Center
DAC – District Accountability Committee
ELL – English language learner
ESSA – Every Student Succeeds Act (replaced NCLB)
IDEA – Individual with Disabilities Education Act
IEP – Individualized Education Plan
LGBT – Lesbian, Gay, Bisexual, Transgender
LGBTQIA – Lesbian, Gay, Bisexual, Transgender, Queer, Intersexual, Asexual
MFHA – Multicultural Foodservice & Hospitality Alliance
MOU – Memorandum of Understanding
NCLB – No Child Left Behind Act
NPTA – National PTA
PARCC – Partnership for Assessment of Readiness for College and Careers
PTA – Parents Teachers Association
SAC – School Accountability Committee
SACPIE – State Advisory Council for Parent Involvement in Education
SRTS – Safe Routes to School
TABOR – Taxpayer Bill of Rights

Sample Budget

Local Unit PTA Adopted Budget Fiscal Year 7/1/xxxx-6/30/xxxx

INCOME	
Carry-Forward From Previous Year	2,000.00
Unallocated Reserves	1,500.00
Membership Income (Local Portion Only)	300.00
Interest Income	100.00
Corporate Sponsors	1,000.00
<i>Fundraising Projects (Net Totals)</i>	
Barnes & Noble Book Sales	2,700.00
Carrabba's Night	3,000.00
Entertainment Book Sales	900.00
Fun Run Income	10,000.00
TOTAL INCOME	21,500.00

EXPENSES	
Bank Fees	50.00
Printing Expenses	150.00
Office Supplies	250.00
Postage	100.00
Liability Insurance & Bonding	200.00
Hospitality: Teacher Conferences, PTA Meetings, Secretaries Day, Volunteer Appreciation	300.00
Reflections	300.00
Scholarship	100.00
Science Fair	300.00
Grants: After School Programs	3,250.00
Leadership Training: Fall Training, State & National Convention, Spring Banquet	1,500.00
Enrichment Speakers	500.00
Teacher Wish List	11,000.00
Unallocated Reserves	1,500.00
Carry-Forward 2009-2010	2,000.00
TOTAL EXPENSES	21,500.00

Local Unit PTA Monthly Treasurer's Report

SAMPLE

August 1, 2015

	Month	YTD	Budgeted	Difference
INCOME				
After School Enrichment	0.00	0.00	0.00	0.00
Barnes & Noble	0.00	0.00	0.00	0.00
Carnival	0.00	0.00	0.00	0.00
Contributions & Donations	0.00	0.00	0.00	0.00
Membership Dues - Local	0.00	0.00	0.00	0.00
Membership Dues - State & Nat.	0.00	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00	0.00
TOTAL INCOME	0.00	0.00	0.00	0.00
EXPENSES				
6th Grade Graduation	0.00	0.00	0.00	0.00
Classroom Parties	0.00	0.00	0.00	0.00
Field Day	0.00	0.00	0.00	0.00
After School Enrichment	0.00	0.00	0.00	0.00
Reflections	0.00	0.00	0.00	0.00
Carnival	0.00	0.00	0.00	0.00
Yearbook	0.00	0.00	0.00	0.00
CSAP Snacks	0.00	0.00	0.00	0.00
School Directories	0.00	0.00	0.00	0.00
Banking	0.00	0.00	0.00	0.00
Childcare for PTA Meetings	0.00	0.00	0.00	0.00
Donations	0.00	0.00	0.00	0.00
Hospitality	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	0.00
Membership Dues	0.00	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00	0.00
Printing & Copies	0.00	0.00	0.00	0.00
PTA Supplies	0.00	0.00	0.00	0.00
Training & Development	0.00	0.00	0.00	0.00
TOTAL Overhead	0.00	0.00	0.00	0.00
Total Expenses	0.00	0.00	0.00	0.00
Checking Account				
Beginning Balance	0.00			
Total Income	0.00			
Total Expenses	0.00			
Ending Balance	0.00			
Savings Account				
0.00				
Grand Total	0.00			

CASH/CHECK RECEIPT VERIFICATION *SAMPLE*

SOURCE OF CASH OR CHECKS: _____

PTA ACCOUNT TITLE FOR DEPOSIT: _____

DATE: _____

TOTAL AMOUNT OF CASH: _____

TOTAL AMOUNT OF COIN: _____

TOTAL AMOUNT OF CHECKS: _____ **# OF CKS** _____

TOTAL AMOUNT TO BE DEPOSITED: \$ _____

SIGNATURE OF PERSON TURNING IN MONEY **DATE**

TREASURER VERIFICATION:

TOTAL AMOUNT OF CASH: _____

TOTAL AMOUNT OF COIN: _____

TOTAL AMOUNT OF CHECKS: _____ **# OF CKS** _____

TOTAL AMOUNT TO BE DEPOSITED: \$ _____

TREASURER SIGNATURE **DATE**

TOTAL AMOUNT GIVEN TO TREASURER AND TOTAL AMOUNT DEPOSITED IN THE BANK SHOULD BE THE SAME AMOUNT. IF THERE IS A DIFFERENCE, EXPLAIN BELOW:

EXPENSE VOUCHER *SAMPLE*

☐ **REIMBURSE**

☐ **DONATION (TO PTA)**

☐ **MAIL**

☐ **PICK UP**

DATE REQUESTED: _____

PAYABLE TO: _____

ADDRESS: _____

PHONE NUMBER: _____

PLEASE ATTACH RECEIPTS

DATE	REIMBURSEMENT ACCOUNT	DESCRIPTION	AMOUNT

TOTAL: \$ _____

REQUESTED BY: _____

PRESIDENT APPROVAL: _____ **DATE:** _____

TREASURER APPROVAL: _____ **DATE:** _____

DATE PAID: _____ **CHECK #:** _____ **AMOUNT: \$** _____

Colorado PTA Contact Information

Region 1 Director -- Region1@copta.org

Region 2 Director -- Region2@copta.org

Region 3 Director -- Region3@copta.org

Region 5 Director -- Region5@copta.org

Region 6 Director -- Region6@copta.org

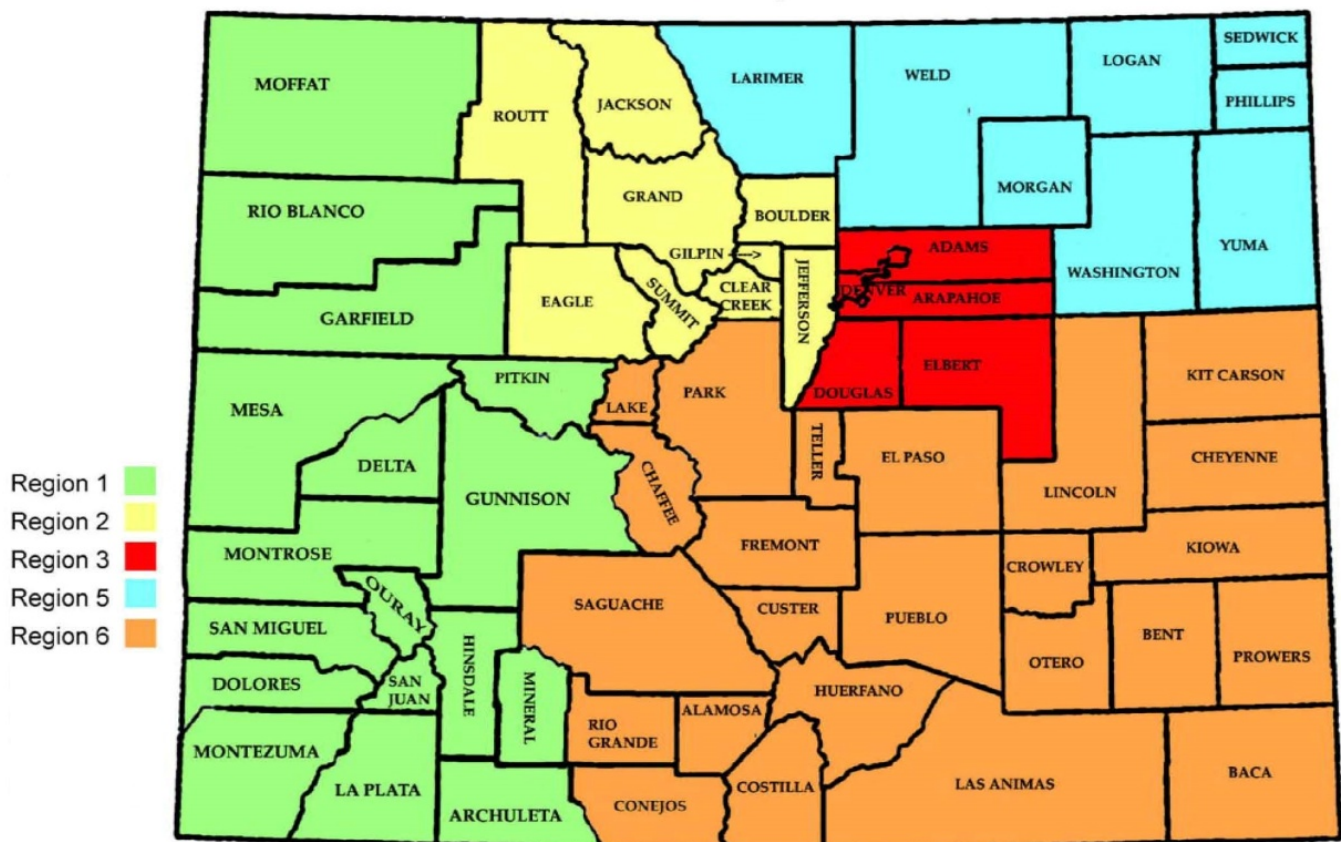
Boulder Valley Council PTA - bvcouncilpta@copta.org

Denver Council PTSA - denvercouncilptsa@copta.org

El Paso Council PTA - elpasocouncilpta@copta.org

Jefferson County Council PTA - jeffcocouncilpta@copta.org

Thompson Council PTA - thompsoncouncilpta@copta.org



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(303) 420-7820

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office@copta.org