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**Formation of New/Alternative Parent and School Support Organizations**  
**Policy Series: 7000 Community**

**Policy No. 7120**  
**Procedure 1**

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**Overview:**

The Board of Education, District, and local school are neutral in the selection of a parent school support association/organization. No endorsement is given or should be implied. Use of District or school logos is not allowed without permission of the District.

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**Procedure for Establishing a New or Alternative Association/Organization**

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A new/alternative parent school support association/organization may seek recognition by the Board of Education according to the procedures outlined below.

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**I. Step One: Notice of Intent/Application**

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A. An applicant association/organization submits a notice of intent to the Office of the Superintendent, including proposed bylaws and policies of the association/organization, and 25 individual signatures (electronic signatures are not allowed) of a parent/legal guardian with a student enrolled at the local school, as listed in the official registration files, indicating support of the notice of intent and application.

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**B. Proposed bylaws and policies must include, but are not limited to:**

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1. A sustainable governance structure, including officers and school representatives;
2. Membership provisions:
  - a) Annual opt-in;
  - b) Employee participation; and
  - c) Secondary student component (if applicable)
3. Nondiscrimination policies;
4. Fiscal accountability practices and procedures requiring an annual review and independent audit. Verification of an independent audit report must be submitted to the Board of Education and Business Administrator; and

- 41                   5. A process for membership approval of an annual budget, including dues,  
42                   if any.
- 43           C. The District will only accept a notice of intent and application if received between  
44           May 1 and October 1 for the upcoming school year.
- 45           D. The notice of intent and application are reviewed and verified by the  
46           Superintendent or designee. This review may take up to 30 calendar days.
- 47           E. The District will notify the applicant association/organization, the current parent  
48           school support association/organization, and the Board of Education whether the  
49           notice of intent and application is approved and verified.
- 50           F. Once approved and verified, the District will provide the applicant and current  
51           associations/organizations a list<sup>[1]</sup> of parents/legal guardians with a student  
52           enrolled at the local school (i.e. local directory information as allowed under  
53           FERPA).
- 54           G. The District will provide a list of employees interested in receiving  
55           communications and information from the associations/organizations. Employees  
56           must express this interest in writing to the Superintendent or designee<sup>[2]</sup>.
- 57           H. The issuance of the above lists commences the time period for the five-year  
58           cycle.

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60   II.   Step 2: Petition for Election:

- 61           A. Once the applicant association/organization receives notice of approval and  
62           verification, the applicant association/organization is provided 30 calendar days  
63           to file a petition for election. Both organizations may campaign during the petition  
64           time period.
- 65                1. The petition for election requires signatures (electronic signatures are not  
66                allowed) of at least 25% of the parents/legal guardians at the local school,  
67                as listed in the official registration files, in support of an election to  
68                determine the recognized parent school support association/organization.
- 69                2. During the petition period of 30 calendar days, the applicant  
70                association/organization and current association/organization may not  
71                collect petition signatures or campaign on school/District property during  
72                school hours (including 60 minutes before or after school hours), or at  
73                school/District related activities or functions, or use District equipment,  
74                supplies, or any other District resource to collect petition signatures or  
75                campaign.
- 76                    a) The local school will facilitate distribution of one (1) electronic flyer  
77                    from the applicant organization and the current organization  
78                    during the petition period.
- 79                    b) The District will facilitate and set an agenda for one (1) community  
80                    meeting where each association/organization will have an  
81                    opportunity to present information to the parents/legal guardians in  
82                    the school.

- 83 3. Once a petition for election is submitted to the Office of the  
84 Superintendent, the Superintendent or designee is allowed up to 30  
85 calendar days for verification of the petition for election.  
86 a) If the petition for election is verified by the Superintendent, the  
87 Superintendent or designee will set an election date and provide  
88 notice of the election period.  
89 b) If the petition for election is not verified, a subsequent notice of  
90 intent and application may not be submitted for that school for at  
91 least five (5) years.  
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93 III. Step 3: Election

- 94 A. Upon verification and notice of an approved petition for election, the  
95 Superintendent or designee will designate an election period for 15 calendar  
96 days.  
97 1. The applicant organization and current organization may not actively  
98 campaign on District property during school hours (including 60 minutes  
99 before or after school hours), or at school/District related activities or  
100 functions, or use District equipment, supplies, or any other District  
101 resource to collect petition signatures or campaign.  
102 2. Election Rules and Procedures:  
103 a) The Superintendent or designee will schedule an election date.  
104 Voting will be conducted by secret ballot.  
105 b) The District Administration will mail out an official ballot with  
106 instructions on how to cast a vote to eligible voters at the address  
107 of district record. Parents are responsible to update their address  
108 of record prior to ballots being mailed.  
109 (1) An eligible voter is a parent/legal guardian as listed in the  
110 official registration files at the local school or an adult  
111 employee of the school. If a parent/legal guardian is also  
112 an employee at the local school, they are entitled to one  
113 vote.  
114 c) Only ballots received or postmarked by the election deadline that  
115 adhere to the ballot instructions will be verified and counted.  
116 d) The parent school support association/organization with a majority  
117 of the votes cast will become the recognized parent school  
118 support association/organization for the next school year,  
119 commencing on July 1st.  
120 e) The Board of Education will ratify the election at a Board meeting.  
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122 IV. Step 4: Final Approval:

- 123 A. The prevailing association/organization has sixty (60) calendar days to provide  
124 verification of the following information:  
125 1. Proof of application for tax-exempt status, EIN number, and a charitable  
126 solicitation agreement or an agreement with the District for financial

- 127 oversight to comply with the exemptions under the Charitable Solicitation  
128 Act.
- 129 2. Documentation that leaders and members will be appropriately trained in  
130 financial management, fundraising protocols, meeting procedures, etc.  
131 Typically, this is provided by the PTA, but PTOs will have to submit  
132 documentation that they have been trained in all the same areas that PTA  
133 leaders are.
- 134 B. Upon verification of the above information, the Board of Education will recognize  
135 the parent school support association/organization beginning July 1.
- 136 C. If the applicant parent school support association/organization cannot meet the  
137 above requirements, the Board of Education will not provide recognition.  
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- 139 V. Miscellaneous:
- 140 A. If a parent school support association/organization dissolves prior to July 1 in a  
141 current school year, a former parent school support association/organization may  
142 be recognized at the discretion of the Board.
- 143 B. Any situations or disputes that arise regarding the validity of a document,  
144 parent/legal guardian signature, election procedures, or any other circumstances  
145 that arise from these procedures, the Superintendent or designee will make the  
146 final decision following Board policies and procedures.
- 147 C. A request for the review of a decision made by the Superintendent or designee  
148 must be made within five (5) calendar days.  
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## 151 Requirements for School Support Organizations 152

153 ~~A PTA group may begin to be organized at any school upon completion of the following~~  
154 ~~procedures. If a school chooses a PTO rather than a PTA, most of the following guidelines~~  
155 ~~should also be employed, excepting the formal association with the PTA organization.~~

- 156 ~~1. Any PTA at a school must first receive the approval and support of the school's~~  
157 ~~principal.~~
- 158 ~~2. Upon receiving the support of the Principal, a school would then need to contact the~~  
159 ~~Region Director. Provo is in Region 10 along with Nebo District. The email address~~  
160 ~~for the Region Director for Provo City School District is [region10@utahpta.org](mailto:region10@utahpta.org). The~~  
161 ~~Region Director changes every two years but the email address stays the same.~~

162 ~~Upon completion of these two steps, a PTA can be organized by:~~

- 163 ~~1. Council or region representatives of Utah (state) PTA or~~

- 164 2. ~~An organizing committee comprised of those at the school, elected at the initial~~  
165 ~~meeting and working under the direction of the council or region.~~

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167 **Once the school support organization has been chosen, the actual** organizing begins with an  
168 initial meeting in which two committees are formed, a bylaws committee and a nominating  
169 committee. Each committee must consist of at least three people. The location, date and time of  
170 the two meetings should be announced well in advance. The purpose of the committees is as  
171 follows:

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173 1. Bylaws Committee:

- 174 a. Create the bylaws and post for 30 days at the school office.  
175 b. The bylaws committee will need to set the amount of the dues. ~~\$1.75 of each~~  
176 ~~membership supports the Utah PTA and \$2.25 of each goes to support National~~  
177 ~~PTA. Councils do not receive operating funds and depend on council dues, which~~  
178 ~~are usually 25 cents per membership. Dues should never be considered the~~  
179 ~~fundraiser for the school.~~  
180 c. **If the school support organization is a PTA, Utah PTA and Region 10 PTA will**  
181 **provide support to this organization** in the form of training, information, support,  
182 materials, leadership, etc. ~~Most schools charge around \$6-7 per year for dues~~  
183 ~~per member.~~  
184 d. **If the school support organization is a PTO, the organization must provide**  
185 **documentation as to how they will train their leadership in the appropriate use of**  
186 **funds, appropriate fundraising procedures, etc.**

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188 2. Nominating Committee: Find one nominee for each office.

- 189 a. President  
190 b. President-Elect  
191 c. Vice President (at least 2– number determined by bylaws)  
192 d. Treasurer  
193 e. Secretary

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195 After posting the bylaws for 30 days, an organizing meeting will be held to:

- 196 1. Vote to approve the bylaws  
197 2. Collect membership forms, distribute membership information, and collect dues.  
198 3. **At least 10 members are required to form a new PTA or PTO.**  
199 4. Nominate and vote on officers.  
200 5. Sign paperwork and return it to the Utah PTA Region Director or Council, if the school  
201 support organization is a PTA or **to the principal, if forming a PTO.** The President of the  
202 school support organization will provide any paperwork needed and assist with this step.

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207 **Fundraising as a School Support Organization**

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It is important to note that any school ~~parent~~-support organization must follow [Provo City School District's](#) fundraising procedures. The organization needs to have an EIN number from the IRS and a Charitable Solicitation Permit. [For PTAs](#), both of these come under the Utah PTA umbrella and local PTAs are not charged for them. Utah PTA provides training for treasurers and will assist with the completion of the IRS Form 990 and will file it with the IRS. [For PTOs, their officers will be responsible for completing and submitting all appropriate paperwork.](#)

**Legal References:**

- [Policy 6110 Donation and Fundraising Policy](#)
- [Policy 7260 Use of School Facilities and Grounds](#)

**Board Approved:** January 13, 2015

Revised:

