



Washington State PTA – Group Awards
STANDARDS OF EXCELLENCE - PTA
Application Instructions and Judging Form 2014-15

Award Outline

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

Application Instructions

Use this application only. Do not alter.

- Please include only this Standards of Excellence - PTA application page with your submission. Subsequent judging form pages are to be used as a guide in creating your submission and do not need to be included.
Award time frame is from March 1, 2014 – February 28, 2015 unless otherwise noted.
Include items in ORDER requested and ONLY the number of items requested.
Submit application and requested pages in a two-pocket portfolio with fasteners or 3-ring binder (no larger than 1").
Highlight the requested information on each page. Add narratives to pages if clarification is needed.
If a flyer, minutes, or a newsletter is requested, include all pages (may be double sided or stapled and put in one page protector. Make sure minutes of more than one page have a header or footer listing the date and type of minutes (i.e. September 2014 General Membership Meeting Minutes).
Mark top of ALL pages with specifics (i.e. March 2014 Board of Directors Minutes).
Partial credit may be awarded if deemed appropriate by the judging committee.
Decisions of Standards of Excellence Committee and Program Director are final.
Awards will be presented at the 2015 WSPTA Convention to be held April 17-19, 2014 at the Bellevue Hyatt Regency.
PTAs must be in good standing with WSPTA in order to participate in the WSPTA group award program.

Form with fields for PTA/PTSA Name, PTA#, President Name, Daytime Phone, President E-mail, Full Mailing Address, and Signature.

Mailing Information

Send Application To: Attention: Standards of Excellence Chair
1304 South Fawcett Ave., #300, Tacoma, WA 98402
253-214-7410 SoE@wastatepta.org

Postmark Deadline: March 1, 2015

Please keep a copy for your records.

PTA/PTSA Name: PTA#:

Standards of Excellence - PTA Judging Form 2014-2015

Section 1: Our PTA is child-focused and responsive to its membership. (Total Points Available = 48)

A. Clearly defined and measurable goals have been established by our PTA and approved by our board of directors and/or general membership. (Total Points Available = 4)

1. Attach: Copy of goals – 2 pts.	
2. Attach: Minutes from general membership or board of director meeting showing approval of goals – 2 pts.	

Total Points Awarded:

B. Programs and activities were designed to address our goals. (Total Points Available = 8)

1. Attach: Program/Activity example #1 and list which goal it addresses – 2 pts.	
2. Attach: Program/Activity example #2 and list which goal it addresses – 2 pts.	
3. Attach: Program/Activity example #3 and list which goal it addresses – 2 pts.	
4. Attach: Program/Activity evaluation example (describe how program/activity is/is not meeting the goal) – 2 pts.	

Total Points Awarded:

C. Regular communication was provided to members concerning **PTA** issues and activities (local, council, region, state and national). (How did the PTA communicate?) (Total Points Available = 2)

1. Attach: Method of communication example – 2 pts.	
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Total Points Awarded:

D. Our PTA determined our members' needs. (Total Points Available = 6)

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

Total Points Awarded:

E. Our membership campaign is ongoing and welcomes all who wish to join and participate. (Total Points Available = 6)

1. Attach: Dated example of Fall 2014-15 membership campaign example – 2 pts.	
2. Attach: Dated example of Winter 2014-15 membership campaign example – 2 pts.	
3. Attach: Dated example of Spring 2014-15 membership campaign example – 2 pts.	

Total Points Awarded:

F. Our PTA is child focused and advocates for children. Examples can include ways your PTA addresses the needs of children in your local community, district, region, state, or nation. (Total Points Available = 6)

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

Total Points Awarded:

G. Meetings are held to address the needs of the membership and to conduct the business of the association. (Total Points Available = 4)

1. Attach: General membership notification of general membership meeting dates – 2 pts.	
2. Attach: General membership notification of board of director meeting dates – 2 pts.	

Total Points Awarded:

H. Our volunteers are recognized. (Total Points Available = 4)

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

Total Points Awarded:

I. Our PTA regularly offers the following awards awards (Golden Acorn, Lifetime Membership, Outstanding Advocate, Outstanding Educator, and Outstanding Student Advocate awards may receive credit). (2 points per award offered with a maximum of 6 points for awards offered) (Total Points Available = 8) **Attach documentation showing awards offered in fiscal year 2014-2015.**

1. 0 awards offered = 0 points / 1 award offered = 2 points / 2 awards offered = 4 points / 3 or more awards offered = 6 points (Points will only be awarded for the highest attained-max 6 pts.)	
2. Attach: Newsletter/other media/flyer/minutes showing award recognition from current or previous year – 2 pts.	

Total Points Awarded:

TOTAL SECTION 1 POINTS:	Total Points Available = 48	Total Points Awarded <input style="width: 50px;" type="text"/>
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Section 2: Our PTA practices fiscal & fiduciary responsibility. (Total Points Available = 38)

A. Our PTA’s budget was approved by the general membership. (Total Points Available = 4)

1. Attach: Copy of 2014-2015 budget – 2 pts.	
2. Attach: Copy of general membership meeting minutes showing approval of budget by membership – 2 pts.	

Total Points Awarded:

B. A year-end financial review was conducted of last year’s books and records. (Total Points Available = 6)

1. Attach: Copy of last year’s (fiscal 2013-2014) year-end financial review checklist (completed financial review form) – 2 pts.	
2. Attach: Copy of last year’s (fiscal 2013-2014) year-end financial review report (additional comments/suggestions from the committee) – 2 pts.	
3. Attach: Copy of general membership meeting minutes showing year-end financial review results were discussed with general membership – 2 pts.	

Total Points Awarded:

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

1. Attach: Current fiscal year monthly financial reports (July – January) – 1 pt. each up to max of 7 pts.	
2. Attach: 2013-14 year-end financial report – 1pt.	

Total Points Awarded:

D. Our PTA’s standing rules were updated and approved by the general membership. (Total Points Available = 4)

1. Attach: Copy of 2014-2015 Standing Rules – 2 pts.	
2. Attach: Copy of general membership meeting minutes showing approval of standing rules – 2 pts.	

Total Points Awarded:

E. The nominating committee was elected by the membership in accordance with WSPTA Bylaws, Article 5, Section 5. (Total Points Available = 4)

1. Attach: Copy of general membership meeting minutes showing election of Nominating Committee – 2 pts.	
2. Attach: Copy of general membership meeting minutes showing election of Nominating Committee alternates – 2 pts.	

Total Points Awarded:

F. Our PTA's officers are elected by the general membership in accordance with WSPTA Bylaws, Article 5, Section 6. (Total Points Available = 4)

1. Attach: Copy of signed nominating committee report – 2 pts.	
2. Attach: Copy of general membership meeting minutes showing election of officers - 2 pts.	

Total Points Awarded:

G. Our PTA purchases insurance. (Total Points Available = 2)

1. Attach: Copy of current fiscal year insurance certificate – 2 pts.	
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Total Points Awarded:

H. Our PTA meets the following requirements from the IRS and State of Washington (Total Points Available = 6)

1. Attach: Copy of fiscal year 2013-2014 tax filing (or acceptance letter) (990, 990EZ, or 990N form) – 2 pts.	
2. Attach: Copy of fiscal year 2013-2014 charitable solicitations renewal (or acceptance letter) or year-end financials showing last year's total income from all sources was less than \$50,000 (with total income highlighted) if no charitable solicitations was required – 2 pts.	
3. Attach: Copy of annual corporate renewal. Include current fiscal year if your incorporation date is between July 1 – February 28. Include previous fiscal year if your incorporation date is between March 1 – June 30. – 2 pts.	

Total Points Awarded:

TOTAL SECTION 2 POINTS:	Total Points Available = 38	Total Points Awarded <input style="width: 50px;" type="text"/>
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Section 3: Our PTA leaders are knowledgeable, involved and well trained. (Total Points Available = 36)

A. Leader training: Region Conference/Leadership Conference/"Other WSPTA approved training" (Total Points Available = 6)

1. Attach: Copy of registrations or <u>certification from Region Director (letter or email)</u> listing attendees <u>or</u> date, time and name of presenter if "other training" was received – 1 pt. each up to 6 pts. maximum	
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Total Points Awarded:

B. PTA and the Law. (Total Points Available = 4)

1. Attach: Copy of registrations or <u>certification from Region Director (letter or email)</u> listing attendees – 1 pt. each up to 4 pts. maximum	
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Total Points Awarded:

C. State PTA Convention. (Total Points Available = 6)

1. Attach: Copy of registration for each attendee – 1 pt. each up to 4 pts. maximum	
2. Our PTA plans to send members to the 2015 WSPTA Convention (attach budget with line item highlighted) – 2 pts.	

Total Points Awarded:

D. Legislative Assembly / Focus Day. (Total Points Available = 6)

1. Attach: Copy of Legislative Assembly registration for each attendee – 1 pt. each up to 3 pts. maximum	
2. Attach: Copy of Focus Day registration for each attendee – 1 pt. each up to 3 pts. maximum	

Total Points Awarded:

E. Training bylaw requirement. (Total Points Available = 2)

1. Attach: Certification (letter or email) from Region Director/WSPTA office/Council president or secretary showing that the training bylaw has been satisfied – 2 pts.	
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Total Points Awarded:	
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F. Officer transition. (Total Points Available = 2)

1. Attach: Description of officer and committee chair transition plan – 2 pts.	
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Total Points Awarded:	
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G. Our PTA shares the information from Council/Region/WSPTA/National PTA with our general membership. **At least one example from each of the following must be provided: your Region, WSPTA, and National PTA.** (Total Points Available = 8)

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

Total Points Awarded:	
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H. Our PTA networks with others. (Total Points Available = 2)

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

1. Attach: Example of working with other PTAs or similar organizations (one example required) – 2 pts.	
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Total Points Awarded:	
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TOTAL SECTION 3 POINTS:	Total Points Available = 36	Total Points Awarded	
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Total Points Earned

Section 1: (Max points allowed = 48) _____

Section 2: (Max points allowed = 38) _____

Section 3: (Max points allowed = 36) _____

Total Points: (Max points allowed = 122) _____

Gold Level (90%) = 110+ Silver Level (80%) 98-109 Bronze Level (70%) 85-97