

Council / Region Beginning Year Reports

Region: _____ Council: _____

Region Director: _____

Address: _____

Phone: _____ Email: _____

Has item been completed? Mark Yes or No or enter other information as requested							
	PTA/PTSA Board List	Budget	DATE When Budget Approved	Minutes of Budget Approved Submitted	Ethics/Conflict of Interest Policy	Basic Fiscal Management Procedures	Insurance Purchased
Council/Region							

Local PTA/PTSA (List)	PTA/PTSA Board List	Budget	DATE When Budget Approved	Minutes of Budget Approved Submitted	Ethics/Conflict of Interest Policy	Basic Fiscal Management Procedures	Insurance Purchased

Council President or Treasurer Signature: _____

Region Director or Treasurer Signature: _____

Date: _____

Instructions

1. Each local unit shall submit its budget, PTA board list, the minutes of the general membership meeting where it was approved, proof of insurance, signed Ethics/Conflict of Interest Policy, and Basic Fiscal Management Procedures to the Council President/Treasurer or Region Director by September 15.
2. Each council will complete this form with the pertinent information regarding each local unit. The council will make a copy of this report for its records and then submit the report form, together with the appropriate local forms, if necessary, to the Region Director or Treasurer by October 1.
3. Each region will maintain a file of local unit and council reports and submit a copy of this form to the Utah PTA Treasurer by October 15.
4. Signatures of Council President or Treasurer and Region Director or Treasurer are required to verify that the information is true to the best of their knowledge.