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Creating a Bright Future  
for Arizona's Gifted Children

# AAGT Affiliate Chapter Handbook 5.0

# Arizona Association for the Gifted and Talented

# **AAGT Affiliate Chapter Handbook**

The original AAGT Affiliate Chapter Handbook was prepared by Shelley Ackerman Hirsch of the 2006-2008 Board of Directors of the Arizona Association for Gifted & Talented (AAGT).

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If you are interested in learning more about the AAGT affiliate chapter handbook, processes, materials, and procedures, or in becoming an affiliate chapter of AAGT, please contact:

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## Chapter 1      **What is an AAGT Affiliate Chapter and its purpose?**

An AAGT Affiliate Chapter is a group of individuals, such as a parent support group, who are concerned about having a positive impact on the gifted education services in their community or school district. There is strength in numbers! The more people you can educate about the characteristics and needs of gifted children, the greater the impact you will have on improving gifted education in your community.

AAGT encourages parents, teachers, coordinators, and anyone concerned about the needs of gifted children to organize and become an AAGT Affiliate Chapter. The stronger our network, the better our ability to improve the quality of programs and services for gifted and talented children throughout the state. AAGT strives to educate legislators about the needs of gifted students, gifted education and appropriate funding. For this purpose AAGT has created its Community Action Network (CAN). When AAGT has a call to action due to an important state or national issue, it will mobilize members of the CAN list. AAGT is part of the larger chain of state gifted associations that affiliate with the National Association for Gifted Children (NAGC). By creating an affiliate chapter of AAGT, you also become part of the national network of advocates for gifted and talented children.

AAGT is proud to assist local groups in forming, operating effectively, and contributing to this important network. Groups can be formal or informal and each has AAGT benefits. For details on organizing either a formal or informal parent support group, please refer to “Specifics for Starting a Parent Support Group” in Chapter 2.

### ***What is a Formal AAGT Affiliate Chapter?***

A Formal AAGT Affiliate Chapter is one that has a Tax ID number, completes the requirements for becoming a non-profit organization, has a formal organizational structure (see Appendix B), and is able to fundraise, benefiting their local community. Formal AAGT Affiliate Chapters pay annual dues (See Appendix O) and receive specific benefits from AAGT, including discounts to AAGT parent events and the opportunity for AAGT to provide an annual guest speaker for their affiliate. Information about setting up a Formal AAGT Affiliate Group is at the end of this chapter.

If your group also chooses to affiliate with your local school district, the school district may have two categories of nonprofits - *incorporated and unincorporated*. Both types of non-profits require a tax ID number, but the unincorporated nonprofit has limitations regarding fundraising, which includes the inability to provide tax-deductible receipts for any donations received. Contact your school district for more information regarding the advantages and disadvantages of such groups. *Unincorporated non-profit groups may affiliate with AAGT as Formal AAGT Affiliates if they are also affiliated with their school district.*

### ***What is an Informal AAGT Affiliate Chapter?***

An Informal AAGT Affiliate Group is one that does not have a Tax ID and is therefore not a non-profit. Its purpose is to educate and disseminate information about giftedness, gifted education, and gifted education advocacy. It has an informal organizational structure (see Appendix B) and is not able to fundraise. Information about setting up an Informal AAGT Affiliate Group is at the end of this chapter.

## **Who may form a Formal or Informal AAGT Affiliate Chapter?**

An AAGT Affiliate Chapter may be formed by any combination of the following:

- Parents
- Teachers
- Retired teachers and administrators
- Gifted Coordinators
- Students
- Community/Business - AAGT affiliates may be chartered to both AAGT and a business or other community organization whose mission aligns with that of AAGT
  - *If you are a non-profit community organization, please visit our website for partnership information.*
  - *If you are a business looking to partner with AAGT, please visit our website for sponsorship opportunities.*
- Professional Service Groups (consultants, psychologists, counselors)
- Anyone interested in helping advance opportunities for the gifted and talented in Arizona

## **How does our group become a Formal Affiliate Chapter of AAGT?**

1. Complete an AAGT Affiliate Chapter Membership Agreement (see Appendix O), which requires three officers' names and contact information, their subscription to the AAGT CAN list, a financial report, and a list of activities.
2. Create Bylaws, including appropriate dissolution clause (see Appendix C for sample bylaws).
3. Submit the membership fee for formal AAGT affiliate chapters (See Appendix O) payable to AAGT.
4. After sending the items below to officemanager@azgifted.com you will be notified upon approval.
  - a. The completed Membership Agreement; check the box for Formal Affiliate
    - i. List of three officers' names, their contact information and their subscription to the CAN list
    - ii. Your group's mission statement
    - iii. Social Media Report
  - b. Your group's bylaws
  - c. Annual Financial Report
  - d. Annual Membership & Activity Report
  - e. The AAGT membership fee

## **How does our group become an Informal Affiliate Chapter of AAGT?**

1. Complete an AAGT Affiliate Chapter Membership Agreement (see Appendix O), which requires three officers' names and contact information, their subscription to the AAGT CAN list, your group's mission statement, social media page, and if applicable, a list of activities.
2. Create Bylaws, including appropriate dissolution clause (see Appendix C for sample bylaws).
3. After sending the items below to officemanager@azgifted.com you will be notified upon approval.
  - a. The completed Membership Agreement; check the box for Informal Affiliate

- i. List of three officers' names, their contact information and their subscription to the AAGT CAN list
  - ii. Your group's mission statement
  - iii. Social Media Report
- b. Your group's bylaws

## ***How do groups benefit from AAGT affiliation?***

### **Formal and Informal AAGT Affiliates will receive:**

1. Receipt of the Affiliate Chapter Handbook, with useful tips on groups and advocacy.
2. Use of AAGT website to create a link to your own group's webpage.
3. Access to the monthly AAGT electronic newsletter for all affiliate members who are also members of AAGT. The newsletter, which is separate from the legislative action alerts, shares events and opportunities that are available to AAGT members, including student scholarship application windows.
4. Reserved place at the Affiliate Roundtable Discussion during the Parent Institute
5. Connectivity in the state-wide network of the gifted community, which includes parents, educators, and other professionals, businesses, and government.
6. Consultation with experts from the AAGT Board of Directors regarding the operation of your group.
7. A place at the table - your voice will impact local and state AAGT policy. Formal and Informal Affiliate chapters may be represented at regularly scheduled board meetings.
8. Advocacy alerts from AAGT & NAGC through subscription to the AAGT Citizen Action Network (CAN).
9. Rights to reprint articles from the AAGT electronic newsletter, as well as most articles from the AAGT website, in affiliate newsletters and publications without specific permission, but with proper citation.

### In addition to the above, Formal AAGT Affiliate Chapters will receive the following:

10. Help to create a federal 501 (c)(3) tax-exempt status pursuant to AAGT's group exemption letter from the IRS.
11. A maximum of buy two/get two free registrations to the annual AAGT Parent Institute. Contact the AAGT Office Manager for details.
12. To the affiliate OR the affiliate's host district, AAGT will provide a 60-90 minute parent seminar once per school year OR a 60-90 minute presentation to teachers on a gifted topic.
13. Discounts from AAGT vendors and publishers when available.

## ***How do gifted and talented children benefit from your affiliation with AAGT?***

- A larger network is created to accomplish gifted education advocacy at local and state levels.
- Local resources are organized to strengthen and expand services and events for gifted children.
- Communities become more informed about giftedness and more involved in gifted education.
- Volunteers and leaders are attracted and developed to help gifted children and to carry out the AAGT mission.
- Local advocates are available to carry out important work in all parts of the state.

- Your organization becomes a ready-made focus group or advisory committee to assist local school districts and educational institutions and confer with them about gifted education issues.

## **What are the Rights and Responsibilities of Formal and Informal AAGT Affiliate Chapters?**

Each year every AAGT Affiliate Chapter completes a new AAGT Affiliate Chapter Membership Agreement, attaching all required items (See Appendix O). Formal affiliates will enclose renewal dues. AAGT affiliate chapters agree to abide by the AAGT Bylaws and agree to meet all other requirements. AAGT does not monitor or suggest group activities or relationships in any way other than as described in this document and on the AAGT website. While affiliate groups are independent of AAGT, the AAGT Board of Directors is always available for help or advice. AAGT may occasionally ask affiliates to help by surveying their members or passing on important information. The membership term runs one (1) year from the date of approval.

### **Community Action Network (CAN List)**

One of AAGT's functions is to educate legislators about the needs of gifted students and the need for gifted education and its funding. For this purpose, AAGT has created its Community Action Network (CAN). When AAGT has a call to action due to an important state or national issue, it will seek to mobilize members of the CAN list, providing members with sample email content and an email recipient list. Leadership members of AAGT Affiliates are to be both current members of AAGT and subscribers to the AAGT CAN list. Your response and your ability to disperse action alerts in your community will have a direct effect on the outcome. Additionally, the advocacy page at the AAGT website will have the current information on AAGT's advocacy efforts.

### **Formal AAGT Affiliates: Record Keeping**

Following are a few items about record-keeping:

- AAGT requires that each formal affiliate chapter annually submits to [officemanager@azgifted.com](mailto:officemanager@azgifted.com) the following documents in order to maintain affiliate status:
  - o Affiliate Bylaws
  - o Affiliate Chapter Membership Agreement with the Mission Statement and Social Media report (see Appendix O)
  - o Annual Financial Report (see Appendix J)
  - o Membership & Activities Report (see Appendix I)
- At least two members of the formal AAGT affiliate's executive committee are to be current members of AAGT.
- All members of the formal AAGT affiliate's executive committee are to be subscribed to the AAGT Citizen Action Network (CAN) list and are to encourage their members/followers to subscribe to the CAN as well.
- AAGT staff will send out letters requesting these updates annually. Sample bylaws, purposes and goals/objectives, treasury reports, contribution receipts, membership reports, and annual financial reports are contained in the Appendix to this Handbook. Although AAGT does not offer any training specific to record keeping, you may request advice from the AAGT Affiliate Coordinator or

the Office Manager. These issues will also be reviewed during the Affiliates Roundtable Discussion at the annual AAGT Parent Institute.

- Each affiliate chapter should have a treasurer who documents all cash and material donations. All donations and expenses need to be recorded and summarized on a treasury report.
- Receipts for cash donations are not required, but many donors will desire and request a receipt for their IRS reporting purposes. A simple receipt book purchased from a local office supply store will suffice for these purposes.
- To open a bank account, your organization will need to show the bank your EIN letter from the IRS and “organizing documents” such as articles of incorporation.
- If you organize as a 501(c)3 nonprofit organization, you will need to determine where to store the documents that your organizational leadership signs on an annual basis. (See section *Other Affiliate Chapter FAQs* and Appendices K-N)

### **Informal AAGT Affiliates: Record Keeping**

- All members of the executive committee of the Informal AAGT Affiliate are to be current members of AAGT.
- All members of the executive committee of the informal AAGT affiliate’s are to be subscribed to the AAGT Citizen Action Network (CAN) list and encourage their members/followers to subscribe to the CAN as well.
- AAGT requires that each informal affiliate chapter annually submits to [officemanager@azgifted.com](mailto:officemanager@azgifted.com) the following documents in order to maintain affiliate status. The AAGT Office Manager will send out letters requesting these updates annually.
  - Affiliate by-laws (see Appendix C)
  - Affiliate Chapter Membership Agreement with the Mission Statement and Social Media Report (see Appendix O)
  - Membership & Activities Report, if appropriate to your group (see Appendix I)
- Sample bylaws, purposes, and goals/objectives and social media reports are contained in the Appendix to this Handbook. Although AAGT does not offer any training specific to record keeping, you may request advice from the AAGT Affiliate Coordinator or the Office Manager. These issues will also be reviewed during the Affiliates Roundtable Discussion at the annual AAGT Parent Institute.

### **Other Affiliate Chapter FAQs**

Q - How do we find out if our group’s affiliate status is current?

A - Please email the AAGT Executive Director at [officemanager@azgifted.com](mailto:officemanager@azgifted.com) for this information.

Q – How do we find out more about the AAGT mission and bylaws?

A – Visit the AAGT website at <http://arizonagifted.org> to read about AAGT, our vision, mission, strategic plan, bylaws, board members, and events.

Q - What if we want to also affiliate with our school district?

A - Contact your school district or local PTO for the steps and resources needed to affiliate with your district. Learn what affiliate options they have available for parent organizations.

Q - What if our district is hesitant about having a parent group that focuses on supporting the families of gifted children?

A - Complete the AAGT Affiliate Membership Packet and provide a copy of your completed packet to your district administrator, along with a copy of both the AAGT Affiliate Handbook and the AAGT Parent Handbook. Explain your rationale for forming a group in your community. Demonstrate your commitment to positive and respectful relationships AND to supporting education and teachers in your district.

Q - May affiliates reprint articles from AAGT publications and its website in affiliate newsletters and publications?

A – Yes, Most articles from the AAGT website may be reprinted in the newsletters and publications of formal or informal AAGT affiliates, without specific permission, if credit is given. However, to avoid violating copyright laws, please check with each author of specific articles for permission and credit requirements.

Q - Do we need to file any forms with the Federal Government?

A – Only formal affiliates need to file forms with the Federal Government. These forms are listed below:

1. First, you need to obtain your own tax ID number from the IRS, even though your chapter receives federal 501(c)(3) tax-exempt status by virtue of being an affiliate chapter in good standing with AAGT. To do this, visit [www.irs.gov](http://www.irs.gov) and complete Form SS-4. Your tax-exempt status entitles your organization to receive tax-deductible donations and make tax-exempt purchases. See IRS Publication 557 and the Appendix of this Handbook for more information.
2. Second, your organization will be required to complete an IRS Form 990-N annually. This is a very short, simple, on-line form, called an “e-Postcard.” All tax-exempt organizations that normally have gross receipts under \$50,000 and do not have to file Form 990 or Form 990-EZ, must file the e-Postcard by the 15<sup>th</sup> day of the fifth month after the close of your tax year (which will be the same as AAGT’s---September 30<sup>th</sup> , unless your group affiliates with your school district and your district has a policy that a parent group’s fiscal year is to align with the district’s fiscal year. If this is the case, then district policy supersedes AAGT policy.) If you do not file, you risk losing your tax-exempt status. See [www.irs.gov/eo](http://www.irs.gov/eo) for more information.

Q - What policies do 501(c)3 affiliates need to have in place per IRS requirements?

A - Per IRS requirements, 501(c)3 non profit affiliates need to have the following three policies in place: Conflict of Interest, Document Retention & Destruction, and WhistleBlower policies. Examples of these policies can be found in Appendices K-N. (See section *Formal Affiliates: Record Keeping*)

Q – Do we need to file any forms with the State Government?

A – No, but it is suggested that if you are a formal AAGT affiliate that your organization considers becoming a non-profit corporation with the State of Arizona. This is important to provide your officers’ protection from personal liability for the organization and to facilitate opening a bank account. See the Arizona Corporation Commission’s FAQ page <https://ecorp.azcc.gov/AzFAQ/Index#faq-cat-4-sub-2> under “Corporations” for instructions and forms.

Q - How does our affiliate group document donations?

A - Only formal affiliate groups are able to receive donations. Each formal affiliate group should have a treasurer that documents all cash and material donations on a treasury report. This report should also be

used to record expenses. See Appendix G for a sample Treasury Report. There is also a sample receipt you can give to donors.

Q - How may affiliate groups solicit contributions/donations?

A - Only formal AAGT affiliates are able to receive contributions/donations. Contributions, and donations of cash and materials may be solicited via direct mail, door-to-door inquiry, etc. However, AAGT does not recommend door-to-door solicitation, especially if children are involved. Solicitations may also be made electronically through your affiliate's website and social media platforms. Unless "stock photos" are used, only use photographs of children's faces if you have written permission from their parents.

Q - May affiliate groups solicit advertising for and to be included in affiliate newsletters?

A - Only formal affiliate groups may solicit and charge for advertising in affiliate newsletters taking care that the mission of the advertiser is not in conflict with the mission of the affiliate and AAGT.

Q – What do we need to know before opening a bank account?

A - Only formal AAGT affiliates need to open bank accounts. In order to open a bank account for your organization, you will need to provide the bank with:

- Name and contact information for three officers,
- EIN (Tax ID Number)
- Copy of AAGT's group exemption letter from the IRS and the AAGT letter granting your organization affiliate status.

"Organizing documents" – Bylaws are usually not sufficient; you might need to register a trade name with the state of Arizona (file an "Application for Registration of Trade Name" with the Arizona Secretary of State at their web site <https://apps.azsos.gov/apps/tntp/na.html> for a small filing fee and receive stamped verification from the Secretary of State that you can present to the bank). If your organization has already filed with the AZ Corporation Commission as a non-profit corporation, you can use those documents. You can access the required forms listed below by signing in to the "Forms" page of the AZCC website:

(<https://ecorp.azcc.gov/AzAccount?redirectUrl=%2FOnlineMenu%2FStartBusinessWizards%3FcategoryID%3D%26parentID%3D6%26filingTypeId%3D>)

- Articles of Incorporation for Tax-Exempt Nonprofit Corporations (includes instructions) and
- Certificate of Disclosure for Non-profit Corporations.

## Chapter 2      Specifics for Starting a Parent Support Group

### Why Should Parents Organize?

Why start a support group for gifted education? What are your goals? Here are some that parent groups have had (and see Appendix A for more ideas):

- To expand your knowledge about gifted/talented children and their needs.
- To gain mutual support and help.
- To advocate and/or effect change.
- To educate legislators and the community on the need for an appropriate education for gifted students.
- To advocate with school administrators and teachers to get appropriate education implemented in the schools.
- To become a link in the larger chain of state and national organizations.
- To provide social and enrichment opportunities for children. (Example: Field trips, Saturday enrichment programs, participation in newsletters, family group, or playgroup concept with monthly adventures or activities.)
- To support or provide resources for the district gifted education program(s).

Parent groups are often a direct outgrowth of a program for gifted and talented students in their school system. These groups may choose to partner with their individual district or school to plan and co-host their activities, in effect serving as their district's "gifted PTO." Some school districts will provide financial and leadership training for parent groups. Some districts provide support for the formation of *unincorporated* nonprofit parent groups which have a tax ID number. Contact your school district for more information regarding the advantages and disadvantages of such groups. Unincorporated non-profit groups with tax ID numbers may affiliate with AAGT as Formal AAGT Affiliates *if they are also affiliated with their school district*.

Other affiliate chapters may maintain their group's autonomy, choosing to serve a geographical area covering the local public school district, charter schools, and homeschooled students. In any case, AAGT encourages parent groups to establish a good working relationship with your local school administrators, although it is not required to officially partner with them or get their permission to exist.

### What is the Best Way to Organize a Parent Support Group?

#### Investigate:

- Learn about giftedness and the purpose of gifted education through the *AAGT Parent Handbook* and its list of resources.
- Learn how your school or district identifies gifted learners.
- Identify how your school and district support gifted learners and the funding resources they have to work with.

- Become familiar with state law on gifted education and the history of state funding (see Chapter 4 of this handbook.)

### **Build Relationships:**

- Connect with other interested parents in your school and district. Craft an email inviting parents of gifted children to gather and meet. Ask your child's teacher or the district Gifted Coordinator to send the email to parents of gifted children. At the meeting, listen to each other and determine priorities. Collect contact information of those who attend in order to facilitate the future plans of your group. Suggestion: Host a "Pastries with Parents" event.
- Consider involving all parents who support able learners (i.e., parents who want higher academic standards for their kids).
- Contact your school administration and/or your Gifted/Talented (GT) Coordinator if you have one. Test the waters to determine receptivity. Listen.
- Contact other parent groups in your area. There is usually a willingness to share the experience.
- Contact AAGT to see what other guidance and assistance is available.
- Be a diplomat; find out how you and your organization can help the administrator and the school district.

### **Organize:**

After you have done some investigation, take these steps to make your idea become reality.

- Gather a group of like-minded people and determine your purpose and goals; put them in writing. (See Appendix A for sample ideas.) Determine if you will be a Formal or Informal AAGT Affiliate by identifying your goals and exploring the structure and benefits of each type of affiliate as described in Appendix B.
- Name your organization. It's good to have a short name that can be easily referred to or an acronym that can be pronounced. Develop a logo.
- Establish a social media presence. Arrange for a first meeting. (Try getting a free calendar listing in a local newspaper or parenting magazine to advertise this first meeting. Advertise through the various social media platforms and school/district newsletters. Connect with other parent groups and ask that they advertise your meeting on their social media pages. See Appendix E.)
- Resource: NAGC provides a free pdf booklet on their website, "Starting and Sustaining a Parent Group" - <https://www.nagc.org/sites/default/files/Parent%20CK/Starting%20and%20Sustaining%20a%20Parent%20Group.pdf>
- If you wish to also affiliate with your school district, contact the district about steps and resources. If your district is hesitant about having a parent group that focuses on supporting the families of gifted children, provide for them a copy of your completed AAGT Affiliate Membership Packet along with copies of the AAGT Affiliate Handbook and the AAGT Parent Handbook. Explain your rationale for forming a group in your community. Demonstrate your commitment to positive and respectful relationships AND to supporting education and teachers in your district.

## **Strengthen your Organization**

### ***Formal AAGT Affiliates***

- Write and formally adopt a constitution and by-laws. (See Appendix C for sample bylaws.)
- Select an Executive Board or Steering Committee
  - Select parent representatives/liaisons for each school within your district or area.
- Establish a mission statement and 2-3 goals
- Determine membership dues (if any) and prepare a membership form and process.
- Establish regular meetings – decide on frequency, type, and location.
- Prepare a budget: dues, expenses, fund-raisers, etc.
- Select officers – president, treasurer, secretary, program chair, newsletter editor, and others your group needs.
- Establish communication pathways with stakeholders (web page, social media platforms, blog, electronic newsletter, etc. with members, school & district leaders, community, etc.)

### ***Informal AAGT Affiliates***

- Write and formally adopt a constitution and by-laws. (See Appendix C for sample bylaws.)
- Select an Executive Board or Steering Committee
- Establish a mission statement and 2-3 goals
  - Plan activities that support your mission and goals
- Select officers and divide up leadership tasks – chair, vice-chair, communications, and others according to your group’s needs.
- Establish communication pathways with stakeholders (web page, social media platforms, blog, electronic newsletter, etc. with members, school & district leaders, community, etc.)

### **Plan Useful and Effective Meetings:**

- Have people at the door to greet arrivals. Have index cards or a sign-in sheet for all attendees to fill out with name, email, address, phone number, and school. Keep an updated database of this information.
- Distribute membership forms and questionnaires, these can be paper or electronic. Be prepared to collect membership dues, if applicable. (To increase membership, consider having new members participate in a lottery for a door prize.)
- Start promptly.
- Prepare an agenda, post it or hand it out, and follow it!
- Allow time for input from those attending.
- Introduce officers and school representatives or liaisons. Ask for volunteers where needed, including standing committees.
- Announce the next meeting. Determine a “good” time for most people. Set aside the same time and day of the same week of each month.
- Invite a speaker. Someone who is knowledgeable about your district’s services is a good beginning. Allocate the major portion of the meeting to the speaker and the questions that follow.
- Don’t let your meetings become a “gripe” session—keep the discussion focused, positive, and productive.

### **Consider These Points to Improve the Chances of Success:**

- Public Relations – how you are perceived.
- Establish a social media presence on platforms that are trending with both young and more experienced parents. (See Appendix E)
- Interaction with other organizations.

- Widest possible appeal – no restrictions on membership and useful, informative events.
- Connection with the school district – coordinator and/or advisory council. Ask if the gifted program will give your group’s contact information to students and parents.
- Seek to advertise your group and its activities in school and district newsletters and their social media platforms.
- Fundraising and donations.
- Affiliation with AAGT (see above for benefits of affiliation).

### **Look to the Future:**

- Keep in contact with your coordinator, principals, superintendent, and teachers with regard to gifted programs and services.
- Establish a webpage and send out regular communications to keep members informed (electronic newsletter, blog, social media pages, etc. (See Appendix E)
- Periodically evaluate your goals and your progress in meeting them.
- Share articles of interest with local newspapers and your parent liaisons for each school. (AAGT affiliate chapters often share the information received from AAGT.)
- Unite the voices of parents so that ways can be found to address the educational needs of able students. For most School Boards, twenty names signing a letter or three people showing up to a Board meeting is a groundswell of support.
- When advocating for services, you will need to compromise between assertiveness and diplomacy. Keep in mind that changing the curriculum takes years. If the administrator is sympathetic, find out where the barriers are and try to push there. Always choose diplomacy first. Remember: “Nice counts” and you are modeling behavior for your children. Always be respectful and treat each and every district personnel as you expect to be treated.

### **Avoid These Pitfalls:**

- Expecting overnight success. Never underestimate the lack of knowledge and interest among some administrators.
- Trying to do it all at once. Plan your growth in steps.
- Not using volunteers. Share the work. Keep eliciting support so that your group will grow, not have the same few people doing all of the work
- Not clarifying volunteer jobs. People get discouraged when they volunteer for a job that does not need doing.
- Allowing personality conflicts to interfere. Everyone has a unique view so emphasize common goals, even if paths differ. Respect each other’s opinions and be willing to compromise. Discuss differences openly and in friendship.
- Letting one person take over a meeting with concerns about his own child. Express sympathy for the situation and suggest continuing the discussion after the meeting, or state at the beginning of the meeting that questions about individual children should be asked after the meeting.
- Letting one person take over the meeting with negative comments and ideas. Keep discussion positive!

### **Cultivate:**

- Diplomacy, not just with school personnel, but in all relationships. Parents of children who are not gifted have a difficult time understanding parents of students who hear a different drummer. Develop empathy for everyone’s situations.

- Political awareness. Keep abreast of local, state, and federal legislation and keep members informed (AAGT affiliate chapters receive advocacy alerts).
- Staying on track. Ensure that all decisions and actions of the organization are in keeping with your original goals. Many worthy ideas will arise but implementation will take time and energy away from meeting those original goals. Keep a list of new ideas for possible inclusion in future goals.
- Encouragement. If your group helps one family to understand their child better, it is a success. If your group makes one principal aware of the needs of gifted children, it is a success. Keep track of your successes and congratulate yourself on them.
- Communication. Look for ways to inform as many parents as possible about your group. For example, ask if your school district will provide information about your group to parents who bring their child to the district for testing. Archive your past e-newsletters. Invite local business leaders to be on your board.

Remember to promote the needs of the gifted, but never at the expense of other children. We expect educational opportunities for our children appropriate to their ability to learn. This is a realistic expectation - do not be deterred from it!

**Be Aware, Be Patient, Be Persistent**

## **Chapter 3      Helping Parents Become Advocates for their Gifted Child**

### **Parenting Resources**

A separate AAGT Parent Handbook has been created to support the parents of gifted children. This can be found on the parent page of the AAGT website: <https://arizonagifted.org/parents-and-students/>

Parents are encouraged to join AAGT and local AAGT affiliates in order to receive support during their parenting journey. Parent emotions are deep and concerns are often high as they struggle to understand and meet the needs of their gifted child(ren). Parents are able to find camaraderie, understanding and support in a parent group.

Parent groups are also able to teach parents how to effectively and respectfully advocate for their gifted child, and, as the child grows, provide tips and resources to parents on how they can teach their child self-advocating skills.

### **Tips to Helping Parents: Advocacy 101**

When faced with the need to speak on behalf of their gifted student, parents will quickly learn that what is happening with their child is linked to the larger context of education – what is happening in the classroom, the school, the district, etc. When their child needs challenge, help, or support at school, the kind of response they will get is affected as much by the quality of leadership as by the quality of teaching and parent support, not to mention available resources. Most parents of gifted students eventually discover their own child is one of many who need help.

- Provide opportunities for parents to become educated and informed about the characteristics of giftedness. Direct parents to the AAGT Parent Handbook and parent page of the AAGT website: <https://arizonagifted.org/parents-and-students/>
- Encourage parents to become familiar with their child's school setting and the people in charge. Provide resources to parents to learn how the schools and the school district are organized and general information with what is supposed to be happening in the classroom, in the school, and in the district. Check the Arizona Department of Education's Gifted Education webpage (<https://www.azed.gov/gifted-education/> for information about gifted programs and services Arizona.
- Encourage and model to parents that it is most effective to establish yourself as an ally to education, through your words and deeds. They can begin by making an effort to meet the teachers, counselors, librarians, nurses, secretaries, custodians, and principals at your child's school.
- Encourage and model to parents that demonstrating support for their school will help win allies as they build relationships by volunteering in some capacity that will help many children. The parent will gain more allies if they project a positive image and respect the efforts of all those involved in education
- Encourage parents that when they meet with teachers and administrators it is better to ask questions rather than complain. Let parents know that often the deep emotions of frustration come from a lack of feeling understood and that being an active member in your parent group will do a lot to help mitigate these feelings. Remember the old adage: You can catch more flies with honey.
- Provide resources in which parents are able to learn a little about the terms used in education in order to help them communicate with teachers. Resources include the AAGT Parent Handbook and <http://www.hoagiesgifted.org/parents.htm>.

## **Tips for Helping Parents: Advocacy in Their Child's Classroom**

The first step to ensuring that their child's needs are addressed in the classroom is to talk with their child's teacher. Encourage them to make an appointment with the teacher to discuss the matter. Encourage them to prepare so they can be specific about what they want to talk about. If they don't hear back after three documented tries, encourage them to contact the principal for a meeting.

Remind parents that everyone on their child's team wants what is best for the child. Encourage them to be persistent and diplomatic. And always, always be respectful and polite. Remind them that they are modeling good behavior for their children; to treat others as they would like to be treated.

Encourage parents to access the *AAGT Parent Handbook* on the parent page of the AAGT website. It contains references and links for many online resources: <https://arizonagifted.org/parents-and-students/>

## **The Positive Impact of Parent Groups: Advocacy at the Local Level**

Advocacy for your own child often leads you to consider what is needed in your district. If you have the time and commitment, join your local parent group, PTO, or other groups that can foster change. Attend School Board meetings and become knowledgeable about such things as the district Acceleration Policy. Check for district websites about gifted and talented services. Meet your Gifted Coordinator and find out what he or she needs to improve services to gifted students.

Get to know the decision-makers on a personal basis and communicate with them frequently. This will allow you to build a relationship of trust and make you the "go-to" person on a particular issue. It also allows you to get a feel for the person and the district's hot-button issues.

Get to know your local School Board. They need to know your group exists and that you are current on your information. If your district has a policy committee, a task force on something, a forum, or any other policy-making body, make sure someone represents the gifted view. Decisions are often made only from the perspective of the people sitting at the table. So make sure you get a seat at the table! Never let a slur to your issue go unanswered.

Parent groups can be very effective, even in small numbers. By developing a reputation for a reasoned approach as well as a fierce commitment to appropriate education for gifted children, many gifted parent groups have facilitated change in the district, regional, and state policy. A tremendous satisfaction comes from knowing you have made a difference in the lives of many children.

This *AAGT Affiliate Handbook* was created to help parents build relationships and be positive influences in their community. The AAGT Affiliate Coordinator is available to help and answer your questions. More information about AAGT affiliates is found on the Affiliate page of the AAGT website (See <https://arizonagifted.org/about-us/affiliates/#!/directory>). Please contact AAGT at [officemanager@azgifted.com](mailto:officemanager@azgifted.com) to reach the Affiliate Coordinator with any questions.

## **Advocacy at the Regional Level**

As you become more knowledgeable about district services, you realize that they are affected by regional issues, especially in rural areas. AAGT provides support to regions throughout Arizona. Contact AAGT to connect with other groups in your region and to find out what is happening in your part of the state. You will be able to meet with parents who share your concerns, and you can share knowledge and gain from one another's experience. Here are some other ideas to be more informed:

- Attend any AAGT meeting or event in a regional area, such as a nearby Affiliate Chapter meeting.
- Visit the AAGT website to find nearby parent groups.
- Join the AAGT Facebook discussion groups, where you can ask questions of other parents and teachers.
- Develop business partnerships to benefit your district and regional area.
- Build relationships between districts' gifted coordinators and parents by inviting coordinators to Affiliate Chapter meetings.
- Maximize regional resources to build capacity for parent groups. Connect with other groups to share strategies, bring in speakers, and co-host larger functions.
- Join with PTO's for meetings and to bring in speakers.
- Network with non-public schools - parochial, charter, independent, home school networks.

- Communicate among parent, coordinator, and teacher groups to share information.

## Advocacy at the State Level

As you become more aware of issues at the regional level, you realize that the big picture solutions come at the state level. AAGT is involved in educating legislators, sharing information and resources with the Arizona Department of Education, and sponsoring annual conferences where vendors, presenters, and gifted educators of all sorts, including parents, can learn and grow.

The first, most important step to becoming aware of state issues is to join AAGT. AAGT is a statewide organization. It is also an affiliate of NAGC, the National Association for Gifted Children. Organize and encourage your group to become an affiliate chapter of AAGT, as there is strength in numbers.

Whenever an important legislative matter comes up that will affect gifted education, keep in mind the following tips so that you can have an impact and make a difference:

- Know who your representatives and senators are at both the state and federal levels. Know where they stand on various issues. Visit [www.azleg.gov](http://www.azleg.gov) to identify your elected officials and learn about them.
- Designate someone in your organization (i.e. your AAGT Liaison) to keep abreast of legislative issues relating to education in general and gifted education in particular.
- Encourage your members to sign up with AAGT's Community Action Network (CAN)
- Inform your members when an email, letter, or phone campaign is necessary. Form a telephone committee to facilitate this action. At least once a year include in your e-newsletter a sample letter to a legislator or include this information on your webpage.

If you are interested in advocating at the state level or finding out more about AAGT's legislative activities, visit the Advocacy page of the AAGT website: <https://arizonagifted.org/about-us/advocacy/>

## Chapter 4 What is the Law?

Arizona is fortunate to have a legal mandate for gifted education. The law, ARS 15-779 et seq, provides specifics for mandatory gifted education for kindergarten through 12<sup>th</sup> grades. Districts are required to involve parents and the community in the development and evaluation of gifted programs and services.

Spearheaded by parents, the gifted education community succeeded in having new legislation drafted, sponsored by the chair of the House K-12 Education Committee, and passed (HB 2552) in 2006 that strengthened the existing mandate and doubled funding. AAGT has continued to monitor state funding efforts and has advocated for funding when dollars for gifted education have not been included in the state budget. Though funding levels at times have been zero, the mandate is still in place and AAGT and members of its CAN network continue to advocate at the state level for funding and support. See the AAGT website for a history of our advocacy efforts. Key points in the legislation include the following:

- (1) changing the definitions of gifted and gifted education to recognize that students are gifted 24/7 and service must be appropriate, an integral part of the regular school day, an integrated and differentiated experience, and commensurate with ability;
- (2) requiring that administrators, teachers, counselors, and school psychologists have professional development to understand giftedness and gifted education modifications;

- (3) declaring it to be in the public interest to assist high achieving and underachieving pupils identified as gifted ( i.e. a top-down declaration of its importance to our state);
- (4) requiring governing boards to modify the course of study and adapt teaching methods, materials, and techniques for gifted students, including those who may have a disability or difficulty with the English language;
- (5) making it easier for gifted transfer students to receive services without unreasonable delay in their new school;
- (6) requiring that the state board of education develop written guidelines to assist governing boards in identifying gifted pupils and providing appropriate programs and services from kindergarten through 12<sup>th</sup> grade;
- (7) requiring that Scope & Sequences be developed that include specific criteria based on the National Gifted Standards and be updated annually if changes have been made or every 5 years if no changes have been made;
- (8) requiring districts to conduct annual evaluations, and include parents in the development and evaluation of, programs and services; and
- (9) requiring the active involvement of the State Superintendent in the development and implementation of gifted professional development, programs, and services.

In addition, the supporting Administrative Code provides additional guidelines for the ADE, school district governing boards, teachers, and parents in meeting the mandate.

To read the statute and administrative code, visit “Mandatory K-12 Gifted Education” at <https://www.azed.gov/gifted-education/>. This law is important for all parents and educators of gifted children to know about and understand. Please take the time to read the law and understand how it impacts your child(ren), your school, and your school district. If you have any questions, please feel free to contact AAGT. We will refer you to a knowledgeable board member who will try to answer your questions or even arrange to have a speaker come to your area to discuss the law.

## **Chapter 5            Appendices**

### ***Appendix A. Sample Purpose, Goals/Objectives, and Duties for AAGT Affiliates***

When forming your purposes and goals ensure that you are not duplicating efforts in your community.

To determine your group's purpose, decide what you want to accomplish by forming this group. Here are a few examples:

- To solicit support for gifted and talented children from local and state policymakers (School Board members, administrators, legislators) and interested community organizations, businesses, and industries.
- To share information in the educating and parenting of gifted children.
- To seek new experiences for the advancement of gifted and talented children by providing exposure to cultural and other educational opportunities.

To determine your group's goals and objectives, be sure they fulfill your purpose. Plan long-term goals for long-range planning and plan short-term, more immediate objectives, for implementation during the current school year. Ideally, objectives will be small steps to achieving the longer-term goals. The following are a few examples:

- To work with local school administrators to implement, expand, or refine a program of instruction for gifted students in your school district.
- To publish a monthly newsletter to be sent to all members of the organization, school, school personnel, local legislators, and interested community organizations and businesses.
- To provide for the education of elected officers in the needs of the gifted.
- To establish a library containing material to educate parents and teachers in understanding gifted children.
- To establish a legislative committee to promote legislative education and support on behalf of gifted children.
- To establish a mentorship program.
- To provide sharing opportunities for parents to learn how to deal with the challenges of raising gifted children.
- To hold monthly meetings with informative programs.
- To offer field trips of interest to local gifted students.
- To create parent liaisons for each school in the district.

## ***Appendix B. Organization Structure and Duties***

### **Formal Affiliate**

Suggested duties of your group's Executive Board could include having the President call periodic Board meetings, which could be held one hour before general meetings. For continuity, it is suggested that the office of Vice President advances to the office of President and that the Past President serves on the Executive Board as an advisor. A Past President is a good choice for the Procedures Chair. Other duties could include:

President:

- ✓ Conducts meetings
- ✓ Represents the organization to the community
- ✓ Attends meetings that are important to gifted policy

Vice President:

- ✓ Coordinates monthly speakers
- ✓ Fills in for President

Secretary:

- ✓ Records minutes
- ✓ Correspondence

- ✓ Keeps database of members
- Treasurer:
- ✓ Collects dues, pay bills
  - ✓ Provides monthly updates
- Procedures Chair:
- ✓ Roberts Rules, By-Laws, precedent
- Communications Chair:
- ✓ Prepares publicity materials and newsletter
  - ✓ Updates website regularly

Duties of Local School Liaisons are also important. Choose a parent from each school in the district. That parent should have a gifted child in the school and should be willing to learn about gifted children and their needs. The representative's goal is to establish a strong rapport between the school and the organization's Executive Board. Responsibilities of the school representatives include:

- ✓ Educating themselves about the educational needs of gifted students and passing on this information to educators and parents.
- ✓ Establishing a good rapport with the principal and the teacher(s) of the school's program.
- ✓ Keeping a current list of the names and addresses of parents whose children are enrolled in the school's program.
- ✓ Serving on the telephone/email committee.

## Informal Affiliate

Establish a three-person steering committee. Choose a chair and identify and assign duties. Suggested duties to assign might include:

- Chair/Local Networking:
  - Conducts meetings
  - The liaison to the school district
  - Connecting with district administration
  - Attending your local school board meetings
  - Serve on district committees
- Communication:
  - Create and oversee the social media platforms for disseminating advocacy and education information to your group. Together the committee decides on their group's message based on their group's mission and goals. (See Appendix E)
  - Submitting information about your group to school/district newsletters
  - Keep a record of meetings and minutes
- State Level Networking:
  - Liaison to AAGT
  - Represents your group at the annual Affiliate Roundtable during AAGT Parent Institute
  - Your affiliate's representative for state-level gifted education advocacy
  - Facilitates the distribution of AAGT advocacy alerts
- As Informal AAGT Affiliates grow in scope and structure, they can file as a Formal AAGT Affiliate.

## **Appendix C. Sample Bylaws**

AAGT is not setting forth any demands or requirements as to specifics, except that for IRS purposes your organization **needs to establish a business year (also known as a fiscal year) and bylaws must include the paragraph about dissolution.** This business year is to be the same as AAGT's: start October 1<sup>st</sup> and end September 30<sup>th</sup>. However, if your group affiliates with your school district, your district may have a policy that states that a parent group's fiscal year is to align with the district's fiscal year. If this is the case, then district policy takes precedence. As long as an affiliate group's bylaws are not inconsistent with those of AAGT, they are acceptable. The requirement for written bylaws is sound practice in accordance with IRS regulations that govern tax-exempt charitable organizations.

To ensure that your affiliate group has a strong foundation for operation and decision-making, and as part of the process to affiliate with AAGT, your group needs to prepare written bylaws. This is a useful way to come to a consensus on how to handle planning, commitments, duties, goals, and any unforeseen circumstances that might arise. Having written bylaws is especially important for groups who are Formal AAGT Affiliates and who plan to raise money and disperse it. Group officers need the legal protection of written bylaws that address financial issues for the voting of funds.

The sample bylaws are written for groups that organize within a particular school district by way of example only; of course, any group of students, teachers, parents, administrators, counselors, psychologists, or others may organize in any way for the benefit of gifted and talented children.

Below are sample By-laws. Write your by-laws to reflect the organizational structure (see Appendix B) of your affiliate (formal or informal) and its purpose.

**ARTICLE I – Name.** The name of this organization shall be the \_\_\_\_\_, (*your organization's acronym*), an affiliate chapter of the Arizona Association for Gifted and Talented (AAGT).

### **ARTICLE II – Purpose.**

Section 1. The organization will support and strive to improve learning opportunities for gifted and talented students in the district(s).

Section 2. The organization will inform district parents, teachers, administrators, and counselors about the needs of and opportunities for gifted and talented students, and related resources and information.

Section 3. The organization will facilitate continuous and productive communication between parents, students, teachers, administrators, counselors, and the community concerning gifted education in the district(s).

Section 4. The organization will affiliate those interested in gifted education in their local community within the state-wide organization known as Arizona Association for the Gifted and Talented (AAGT), which disseminates information about gifted and talented and pursues legislation that truly benefits children who are gifted and talented and the professionals who assist them.

### **ARTICLE III – Membership, Dues, and Assessments**

Section 1. Membership shall be open to all parents, members of the community, and school personnel who are interested in the education of students who are gifted and talented.

Section 2. **For Formal AAGT Affiliates:** The initial and annual membership fee for the organization to affiliate with AAGT shall be in accordance with the current dues structure of AAGT. This organization may decide to assess individual membership fees of its own members by a majority vote of its executive board.

Section 3. All members of this organization shall be eligible to vote in elections (one vote per membership) and to hold office and serve as chairs in this organization.

#### **ARTICLE IV – Officers and Duties**

Section 1. **For Formal Affiliates:** The officers of this organization shall be president/chair, vice-president/vice-chair, secretary, treasurer, and \_\_\_\_\_. There shall be at least three (3) officers, including a president and treasurer (who shall not be the same individual).

**For Informal Affiliates:** A Steering Committee of at least three, organized as chair, vice-chair and secretary.

Section 2. The terms of the officers shall be \_\_\_\_\_ year(s). Election of the officers, by the general membership, shall occur during \_\_\_\_\_ of each year and the elected officers shall assume office at the meeting.

Section 3. Nominations for officers shall be made by the general membership before or at the \_\_\_\_\_ meeting.

Section 4. The duties of the officers shall be as follows.

The president/chairperson shall preside at the organization's business meetings, serve as president/chair of the Executive Board, and serve in all other manners directed or authorized by these by-laws and their amendments.

The vice-president/vice-chair shall serve in the capacity of the president/chair in the absence of the president/chair. In the case of vacancy of the president/chair, the secretary shall serve out the remainder of the term as vice-president/vice-chair, and the Executive Board shall appoint a secretary from the general membership.

The secretary shall keep an accurate record of the proceedings of all meetings of the organization and of the Executive Board; shall be prepared to refer to minutes of previous meetings; shall conduct all necessary correspondence of the organization at the direction of the Executive Board; and shall notify all Executive Board members of Executive Board meetings.

**For Formal AAGT Affiliates:** The treasurer shall receive all money for the organization and shall deposit it in the name of the organization in a bank approved by the Executive Board; shall keep an accurate record of all receipts and disbursements; shall present a statement of account at every business meeting of the organization and at other times when requested by the Executive Board; and shall make a full annual report to the organization. The treasurer and the president/chair shall be authorized to sign checks issued by the organization. Disbursement of funds in excess of \$\_\_\_ must be authorized by the Executive Board.

#### **ARTICLE V. The Executive Board of a Formal Affiliate or Steering Committee of Informal Affiliate**

Section 1. The Executive Board (or Steering Committee) shall consist of all officers of the organization and the chairpersons of the standing committees.

Section 2. *(As an Informal AAGT Affiliate the Steering Committee will need to address the business of the organization but not financial matters. Modify this section in your by-laws as appropriate.)* The Executive Board or Steering Committee shall conduct all necessary business between regular organization business meetings referred to it by the organization. The Executive Board will also transact other business as needed. It must authorize the payment of any bill exceeding \$\_\_\_ not previously authorized or included in the budget. It shall create such standing committees as are deemed necessary to carry on the work of the organization.

Section 3. The Executive Board or Steering Committee shall meet as deemed necessary to conduct business but at least \_\_\_\_\_ times a year. Special meetings of the Executive Board or Steering Committee may be called by the president/chair, or a special meeting requested in writing by members of the Executive Board shall be honored.

Section 4. A majority vote of the Executive Board or Steering Committee members present shall be deemed adequate and acceptable for conducting and transacting business.

Section 5. When a board member fails to attend \_\_\_ or more consecutive meetings without notifying the secretary or president/chair of the Executive Board or Steering Committee, that office shall be declared vacant by the Executive Board or Steering Committee.

Section 6. Each member of the Executive Board or Steering Committee, upon expiration of his or her term of office or in the event of his or her resignation, shall turn over to his or her successor without delay all pertinent record books, notebooks of the office, funds, and other materials pertaining to the office.

Section 7. All decisions made by the Executive Board or Steering Committee shall be presented to the general membership and voted on when appropriate.

#### **ARTICLE VI – Standing Committees**

Section 1. Chairpersons of standing committees shall be elected from the general membership.

Section 2. The terms of office for chairpersons of standing committees shall be one year or until their successors are elected.

Section 3. Each standing committee chairperson or special committee chairperson may select as committee members any member of the organization in good standing.

#### **ARTICLE VII – Meetings**

Section 1. Meetings of this organization shall be called by the Executive Board or Steering Committee at least \_\_\_ times per year.

Section 2. A majority vote of members present shall be deemed adequate to transact business. At least \_\_\_% of the members must be present at the meeting to constitute a quorum to transact business.

Section 3. The privilege of holding office or voting in an election shall be limited to members of this organization.

*(NOTE: Your organization’s by-laws may want to specify the different sorts of meetings that the organization can hold. Aside from initial organizational meetings, your organization may want to hold several Executive Board or Steering Committee meetings, some small committee meetings with chairpersons appointed by the president/chair for specific tasks, and at least three informational meetings for all members during each year. “Nuts and bolts” business is best conducted at the Executive Board or Steering Committee meetings with brief, general information such as a president’s and treasurer’s report (see Appendix G for Treasury Report) and the like at the general membership meetings. See below for other meeting and event tips.)*

**ARTICLE VIII – Business Year.** The organization’s business year shall begin on October 1<sup>st</sup> of each calendar year and end on the following September 30<sup>th</sup>. (If your group affiliates with your school district, the district may have a policy that a parent group’s fiscal year aligns with the district’s fiscal year. If this is the case, then district policy supersedes AAGT policy.)

**ARTICLE IX – Amendment to By-laws.** The by-laws may be amended at any regular or special meeting by a vote of the members present, provided that notice, including the subject of the proposed amendment, has been given to the general membership in writing at least two weeks prior to the vote.

**ARTICLE X – Dissolution.** In the event of dissolution, all assets of this organization, including social media accounts, shall be transferred to an organization organized and operated exclusively as a tax-exempt organization as defined by the Internal Revenue Service under Section 501 (c)(3) of the Internal Revenue Code.

## ***Appendix D. Additional Tips for Successful Meetings and Events.***

Here are some additional tips for successful meetings and events, networking and communications, and fundraising. If you would like to consult with an AAGT Board member about your organization's specific needs, please feel free to contact the AAGT Office Manager at [officemanager@azgifted.com](mailto:officemanager@azgifted.com). The following information was excerpted from parent materials prepared by the Florida Gifted Network, an NAGC affiliate.

To attract the most people to your meetings and events, consider doing the following:

- Publicize meetings and events on social media, in local newspapers, flyers, group emails, and newsletters, and/or notices sent home with students. (See Appendix E)
- Have a speaker on a topic connected with giftedness or how to support giftedness. You can also arrange for a panel of speakers to address a specific topic, such as local teachers or administrators, psychologists, or other professionals who work with gifted and talented. For Formal AAGT Affiliates, the AAGT Board of Directors is also available to assist your organization with locating and arranging guest speakers, which may include a member of the AAGT Board of Directors.

Successful meetings incorporate these ideas:

- Choose the best time of day, the best day of the week, and the best location to obtain the biggest audience.
- Provide an agenda.
- Use name tags and include the school name.
- Use sign-in sheets with names, addresses, phone numbers, schools, and an opportunity to sign-up to help the parent group in some capacity.
- Make newcomers feel welcome. Assign members to new members and guests.
- The group leader MUST act as a good facilitator or consider bringing in someone to facilitate the meeting. Keep to the agenda. Provide a BIN sheet in which to add questions, comments, further action to take or discuss, but that is not on the agenda.
- Offer refreshments or do a pot-luck lunch, supper, or offer dessert.
- Acknowledge VIPs in the audience.
- Include teachers of the gifted, school board members, and school and district personnel in your invitation list.
- Send a press release announcing your meeting.
- Seek permission to "advertise" the meeting through the school system: their website, administrative bulletins, and newsletters, flyers sent out to parents of the gifted via the district's inter-office system. Some districts actually will do this.
- Consider doing the work of the board/steering committee separate from the public meeting.
- At Steering Committee/Board Meetings, share short reports from different schools about their gifted programs, activities, and ideas.

- Send meeting announcements early and consider developing a calendar of meeting dates early in the year.
- Provide handouts for parents at all meetings (and so note in any publicity for the meeting). Parents love to receive resource information and many will come to a meeting just for that reason. Make sure that this is done even at your Steering Committee/Board Meetings. These parents also need something in return for attending the meeting. Bribery helps.
- Do not get bogged down in personal horror-story telling. Nothing can paralyze the group quicker than to turn each meeting into a gripe session. Do allow an organized way of letting parents let off steam: break into small group discussions with a facilitator and recorder, stay after the meeting to share stories, pass around written surveys, etc. Find ways to hear gripes in an arena that creates ideas for positive action.
- Offer meeting topics of general interest to a large group of parents.
- Be on the lookout for positive parents and tap them for your steering committee or board positions.
- Take simple minutes which explain what was discussed, action taken, or to be taken, who is responsible, next meeting dates underlined.
- Mail the unapproved minutes to key people who were not in attendance at the meeting to keep them up to date.
- Write "thank you" notes to speakers, presenters, and to anyone helping to host the event.
- Don't have a meeting just to have a meeting; make it meaningful, or don't have one.
- If you find parents are not coming to your meetings, try to figure out why: late notices, not getting a notice, bad time, poor topic, distant location, just too busy..... Then determine if the meetings are worth the effort or if sharing the information via a newsletter would be an easier way to accomplish your goals.

Hold workshops to educate your members. Speakers can be teachers of the gifted, a school district gifted coordinator, private psychologist university professor/trainer for teachers of the gifted. Consider topics such as:

- Underachieving Gifted Learners
- Gifted and LD (or ADHD)
- Gifted Girls
- Middle School/Adolescent Gifted
- Perfectionism
- Social and Emotional Needs of Gifted Learners
- Nurturing Creativity in Your Child
- So My Child is Gifted, What Now?
- Options for Gifted Learners – an overview of appropriate services for gifted learners
- Resources and Summer Programs that are appropriate for gifted learners
- The Internet and Gifted Learners
- High School options for gifted learners
- College Comes Sooner than you think
- Successful Advocacy at school, district, and state levels

Networking and Communications:

Nearly all AAGT affiliates have newsletters, usually via email, for their members. Newsletters allow affiliates to provide members with important information about meetings and events and other local programming for gifted and talented, and to relay information provided by AAGT that is useful for the organization and its members to stay connected to Arizona's gifted community.

Here are some recommendations to consider for successful newsletters:

- Include special features such as special recognition of local individuals, book reviews, and recommendations on the subject of giftedness, spotlights on local programs and services for the gifted and talented, upcoming conferences, events, competitions, etc.
- For communities in which printed newsletters rather than email are preferred, consider seeking assistance from school districts, local printers, and businesses to help fund printing and mailing costs. When you have non-profit status (i.e., a tax ID number for non-profit organizations) you may apply for a bulk rate mailing permit through your local branch of the U.S. Postal Service.
- Keep newsletters short, one or two pages at the most, and be sure to include contact information for your officers.
- Try to include as many important "players" in your community on your newsletter mailing list, such as school district governing board members, administrators, gifted teachers, counselors, and psychologists. The goal is to educate and inform your local community about the needs and opportunities for the gifted and talented.

It is also useful and prudent to communicate regularly with local school district officials, such as the governing board, the superintendent and other administrators, and teachers. Attend meetings, get involved, and demonstrate that your organization is interested in being a "team player".

### **Fundraising for Formal AAGT Affiliates:**

As organizations mature, they inevitably consider fundraising. Funds are essential for gifted classroom supplies, training of teachers and counselors, scholarships for gifted students to attend gifted-related events or summer camps, etc.

Some affiliates have been successful with the following fundraising tactics: holding silent auctions, used book sales, game booths at school carnivals, selling food at events, hosting workshops for parents or students, sponsoring theatre trips, hosting speaking events with state experts or nationally-recognized experts in the field of gifted and talented. You may also consider seeking corporate donations from local businesses. Businesses should be asked to donate precise amounts for specific purposes. Requests for internships, field trips, classroom materials that are not funded by the local school district are appropriate appeals to make. A business needs to know that it is providing funding for specific items that the regular school taxes cannot cover. Remember that personal access to key business decision-makers is what will be successful. Also, remember to describe to businesses the return on their investment; business leaders want to see some future benefit for their interests, besides a tax break, resulting from their donation. They will be glad to know that they are investing in the children who will be the future leaders, idea-people, and creative problem-solvers of business.

AAGT does not advise selling door-to-door, especially if the sellers are children. AAGT recommends checking with your local school district at an early stage to see if the desired fundraiser is permissible.

## **Appendix E. Getting the Message Out**

### **Tips for Social Media**

Establish your own social media guidelines that your group's leadership will agree to. Consider the following adaptations from the AAGT Social Media Policy.

#### **Social Media Principles**

Education- We will distribute information for teachers, students, parents and community supporters regarding resources and educational opportunities to further the understanding of gifted students and their unique learning differences.

Advocate- We will continually advocate for gifted education programs and services for our gifted students that are commensurate with their abilities and accommodating to their social and emotional needs.

Diversity- We will respond to the needs of the diverse population of our community.

#### **Social Media Roles**

Designate a manager of all official social media for your group. Ensure that at least two people from your leadership are assigned access to all of your social media platforms, keeping all usernames and passwords accessible to these individuals.

#### **Social Media Guidelines**

1. Do create posts and share posts that align with your mission statement.
2. Do create posts that are concise and strategic.
3. Do show interest in the needs of our gifted community.
4. Do create a balance between advocacy, education and marketing.
5. Do be responsive to messages and feeds within 24 hours.
6. Do strive for timely and current information that is new and relevant posting at regular intervals for the platform being used.
7. Do reflect the core values of your group in all posts.
8. Do not submit or post anything that would be considered unethical.

#### **Social Media Monitoring**

Social media must be monitored. The manager of your social media accounts should monitor these on a regular, if not daily, basis.

## Responding to Comments

If a reader leaves a negative comment, it is at the discretion of the your social media manager to determine if the negative comment is to be deleted. However, if the comment contains disrespectful or derogatory language, it should be deleted. If a comment threatens the integrity of your group or AAGT it should also be deleted.

Keep a friendly and professional tone when posting and having conversations with stakeholders. Avoid communicating in a “corporate” tone.

When posting or replying to a message, take the time to review the content to ensure it cannot be interpreted in any negative light. Direct media inquiries to your group’s president/chair who can then direct the inquiry to the appropriate person.

## Social Media Privacy and Permissions

- Photos and videos of people that are unidentifiable may be posted.
- Photos and videos of people that are identifiable may be posted with permission only.
- Do not post full names of people who are not part of your leadership team. If you discuss a situation involving individuals on a social media site, be sure that they cannot be identified.

## Tips for News Releases

- Be timely and newsworthy
- Get to know your ‘media contacts’
- Get students involved
- Contact in advance of the event
- Don’t assume anything
- Keep the News Release to one page
- Send thank-you notes after the event

You will have more success if you keep some simple principles in mind:

- For smaller, community-oriented newspapers: the easier it is for the newspaper, the more likely they will publish.
- For bigger newspapers: conflict gets published, human interest less so. A “story” in the journalism lexicon is just like you learned in English class: it has a protagonist and antagonist, a conflict. The difference is a newspaper is willing to publish a story that simply reports the details of the conflict.
- Timing is important: the news release has to be timely. This means you have to have already written and sent the press release at the time of the event. Find out what the deadlines are for all media and calendar formats. Weekly newspapers typically have a deadline three days before the newspaper appears on your doorstep.

## When to Alert the Media

- o Unique Events
- o Service Projects in Community
- o Recruiting Events
- o Human Interest Possibilities
- o FundRaising Events
- o Award Ceremonies

## Sample News Release

NEWS RELEASE NEWS RELEASE NEWS RELEASE

Add a personal note to the Editor requesting news coverage.

Date: Today's Date

To: News Editor  
Name of Publication

From: Name / Title / Address / Phone / Email

ACTION HEADLINE GOES HERE

WHO:

WHAT:

WHEN:

(PLUS THE BEST TIME TO ATTEND THE EVENT FOR NEWS COVERAGE PURPOSES)

WHERE:

WHY:

HOW:

Add a "Quote" or Education Fact, such as:

"Did you know that there are more than X,XXX gifted students served in the x Schools?"

For more information: President xxxx xxxxxx @ 599-xxxx, xxx@xxx.xxx  
ORGANIZATION NAME & ADDRESS

(Special thanks to the Ohio Association for Gifted Children for use of this information.)

## What if No Coverage Appears

- o Demands are high, space is tight
- o Resources are limited.
- o Don't give up. Don't burn any bridges. Try again.
- o Many times news coverage is a matter of luck!!

## Appendix F. Additional IRS-EIN and Form 990-N Suggestions (For Formal Affiliates)

To become an affiliate group that collects dues, the contact person for the group must obtain an EIN from the IRS by completing an SS-4 form. Your group will also be required to complete a brief, on-line "e-Postcard" known as IRS Form 990-N each year. This Appendix section answers questions about both.

Q - What is an EIN?

A - An EIN is a nine-digit number (for example, 12-3456789) assigned to sole proprietors, corporations, partnerships, estates, trusts, and other entities for tax filing and reporting purposes. The information you provide on this form will establish your business tax account. An EIN is for use in connection with group business activities only. Do not use your EIN in place of your personal social security number (SSN).

Q – How do we apply?

A - You can apply for an EIN on-line, over the telephone, via fax or through the mail. See the Form SS-4 instructions at [www.irs.gov/pub/pub/irs-pdf/iss4.pdf](http://www.irs.gov/pub/pub/irs-pdf/iss4.pdf) for further details. Click on EIN at the top of the page. Then follow the instructions (also discussed below).

- To apply online, use the [online EIN application](http://www.irs.gov) available at [www.irs.gov](http://www.irs.gov) website.
- To get an EIN over the IRS's toll-free telephone number, call (800) 829-4933. The hours of operation are 7:00 a.m. to 10:00 p.m. local time, Monday through Friday. See the EIN [Toll-Free Telephone Service](#) link at [www.irs.gov](http://www.irs.gov) for more information.
- To request an EIN via fax, 24 hours a day / 7 days a week, dial the fax number at the location accepting applications from your state. The instructions on Form SS-4 indicate which location will accept your faxed request.
- To receive an EIN through the mail, complete [Form SS-4](#). The instructions on the form provide the correct address.

Third parties can receive an EIN on a client's behalf by completing the new "Third Party Designee" section and obtaining the client's signature on Form SS-4. This avoids having to file a [Form 2848](#) (*Power of Attorney*) or [Form 8821](#) (*Tax Information Authorization*) to get an EIN for their client.

Q - Do we need to file any additional forms with the IRS?

A – Once you have completed the EIN form and shared it with AAGT, all additional IRS filing is taken care of by AAGT. However, you will still need to complete Form 990-N each year (see below).

Q – What about the SS-4 Form?

A – The SS-4 form can be completed online or a paper form can be completed. To be completed online, do an internet search for "apply for EIN." To complete a paper form, go to this site: <https://www.irs.gov/pub/irs-pdf/fss4.pdf>. Here are some details based on the IRS version of the form revised July 2007. You will be filling in lines 1, 3, 4a-6, 7a and 7b, 8a, 9a, and 9b, 10-18

1. Affiliate group name
3. Contact person's name
- 4a-6. Contact person's address, etc.
- 7a. President's name

7b. President's SSN

8a. Check "No"

9a. Checkbox that reads "Other" (specify)>write in nonprofit organization-educational

9b. If your organization is also a non-profit corporation through the AZ Corporation Commission, write "Arizona"

10. Checkbox that reads-Other (specify)> write in educational Group Exemption Number (GEN)> 3049

11. Date business started (put the date of affiliation)

12. Write in September

13. Under "Other" write "0"

14. Check the box "No"

15. Write in N/A

16. Check the box that reads "Other"(specify)> write in educational

17. Write in "educational non-profit services"

18. Checkbox "No"

Write the name, Sign, and Date, provide telephone and fax information if applicable.

Q – What information is asked on IRS Form 990-N (the "e-Postcard")?

A - Here is what you will be required to file for the IRS Form 990-N e-Postcard:

- Organization's legal name and any other names your organization uses,
- Organization's mailing address,
- Organization's website address (if applicable),
- Organization's employer identification number (EIN),
- Name and address of a principal officer of your organization,
- Organization's annual tax period,
- A statement that your organization's annual gross receipts are still normally \$25,000 or less, and
- If applicable, a statement that your organization is terminating (going out of business)

## Appendix G. Sample Treasury Report (For Formal Affiliates)

Affiliate Name

Date of Treasury Report

Name of Treasurer

Beginning Balance: \$ 950.61

Deposits: + \$67.00

2020/21 Membership Dues for 3 Members @\$15.00 each \$ 45.00

Super Saturday Art Contributions \$ 16.00

Chess Contributions \$ 6.00

Expenditures: - \$25.00

(Reimbursement to David Jones for  
Art Super Saturday Materials) \$25.00

Ending Balance: \$ 992.61

## Appendix H. Sample Receipt for Monetary or Material Donation (For Formal Affiliates)

(Name of Your Organization)

Date \_\_\_\_\_

Affiliate Name \_\_\_\_\_

Received of \_\_\_\_\_

Amount/Detail \_\_\_\_\_

---

Affiliate Officer's Signature and Title

(Organization name) is an affiliate chapter of the Arizona Association for Gifted & Talented (AAGT), which are both tax-exempt under Section 501(c)(3) of the Internal Revenue Code. (Organization name) tax ID # xxxxxxxxxx. Donations are tax-deductible to the extent permissible by law.

## Appendix I. Sample Membership & Activity Report (For Formal Affiliates)

Affiliate Name  
 June 7, 2020 Membership & Activity Report  
 Name of Secretary

2020/2021 Paid Members as of April 5, 2021	29
2020/2021 Local Members Added –	Jane Smith John Doe Nancy Jones
2020/2021 AAGT Members Added -	Lea Pines Jeff Atkins Nancy Jones
2020/2021 Local Members as of June 7, 2021	32
2020/2021 State and Local Members as of June 7, 2021	35

### Activity Information

Date held	Activity Name	Activity Purpose/Topic	Attendance

## Appendix J. Sample Annual Financial Report (For Formal Affiliates)

Affiliate Chapter Organization Name

2020/2021 Annual Financial Report

Name of Treasurer

Beginning Balance as of October 1, 2020	\$ 830.84
Total Deposits to Date + \$230.00	
Membership dues	\$ 200.00
Donations	30.00
Total Expenditures to Date	- \$411.38
Local Club Assistance	
Honorarium(s)	\$ 27.00
Postage for newsletter and	
Super Saturday notice cards	249.00
Picnic Reimbursement	23.61
Newsletter Printing	22.52
Postage/Mailing Supplies Reimbursement	75.25
Bank checks	14.00
Ending Balance as of August 5, 2021	\$ 649.46
Projected Deposits through September 30, 2021	+ \$30.00
Membership/donations	\$ 30.00
Projected Expenditures through September 30, 2021	- \$210.02
Super Saturday reminder cards	\$ 187.50
Newsletter printing	\$22.52
Projected Ending Balance as of September 30, 2021	\$ 439.44

## **Appendix K - Sample Conflict of Interest Policy (For Formal 501(c)3 Affiliates)**

### **AAGT Conflict of Interest Policy**

#### **Article I: Purpose**

The purpose of the Conflict of Interest Policy is to protect the interest of the *Arizona Association for Gifted and Talented* (the “Association”) when it is contemplating entering into a transaction or arrangement that might benefit the private interest or might result in a possible excess benefit transaction for an officer or director of the Association or a member of one of its committees or task force groups. This policy is intended to supplement, but not replace, any applicable state and federal laws governing conflict of interest applicable to nonprofit organizations.

#### **Article II: Definitions**

1. **Interested Person** - If a person is a director, officer, staff, or member at large (the “Member”) of a committee or task force group that has the power to bind the Association, and if that individual has a direct or indirect financial interest (as defined below), he or she is defined as an Interested Person.
2. **Arms Length Bargaining** - Of or relating to transactions between two parties who are independent and do not have a close relationship with each other. Presumably, these parties have equal bargaining power and are not subject to undue pressure or influence from the other party.
3. **Financial Interest** - A person has a financial interest if the person has, directly or indirectly, through business, investment, or family relationship:
  - a. An ownership investment interest in any entity with which the Association has a transaction or arrangement;
  - b. A compensation arrangement with the Association or with any entity or individual with which the Association has a transaction or arrangement; or
  - c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Association is negotiating a transaction or arrangement.
4. **Inurement** - Occurs when an “insider” of an exempt organization receives any of an organization's net income or inappropriately uses any of its assets for personal gain. An insider is a person who has a personal and private interest in the activities of an organization.

As used herein, “compensation” includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. As used herein, “transactions and arrangements” with the Association do not include customary charges paid by members such as dues, seminar fees, and normal purchases of member products and services.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate board or committee decides that a conflict of interest exists.

### **Article III: Procedures**

- 1. Duty to Disclose** - In connection with any actual or possible conflict of interest, an Interested Person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the other members of the board or the committee considering the proposed transaction or arrangement.
  - a. Members will sign annually the AAGT Conflict of Interest Disclosure Form and provide updates in the interim as needed. The original signed forms and a copy will be kept in two different secure places, specifically \_\_\_\_\_. Digital copies of the signed forms will be stored electronically where all organizational leadership has access..
  
- 2. Determining Whether a Conflict of Interest Exists** - After disclosure of the financial interest and all material facts and after any discussion with the Interested Person, he or she shall leave the board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.
  
- 3. Procedures for Addressing the Conflict of Interest**
  - a. An Interested Person may make a presentation at the board or committee meeting, but after the presentation, he or she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
  - b. The president of the board or chairperson of the committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
  - c. After exercising due diligence, the board or committee shall determine whether the Association can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
  - d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the board or committee shall determine by a majority vote of the disinterested board members whether the transaction or arrangement is in the Association's best interest, for its own benefit, and whether it is fair and reasonable. In the conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.
  
- 4. Violations of the Conflicts of Interest Policy**
  - a. If a board member has reasonable cause to believe another board member has failed to disclose actual or possible conflicts of interest, they shall inform the Executive Committee in writing as to the basis for such belief. The Executive Committee shall then afford the member an opportunity to explain the alleged failure to disclose in writing.
  - b. After hearing the member's response and after making further investigation as warranted by the circumstances, if the Executive Committee determines the member has failed to

disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

#### **Article IV: Exhibitor Policy**

1. Members who have a business, work for an employer or offer services in the area of gifted education will be found to be compliant with the Conflict of Interest policy when the following procedures are followed:
  - a. When applying to be an *Association* Sponsor, *Association* Exhibitor, etc. -
    - i. The Members pay the standard fee without special privileges.
    - ii. Members do not use their position on the board in any of their business marketing at *Association* events or on *Association* platforms, such as in *Association* email, etc.
    - iii. Members do not staff their own exhibitor table (or its equivalent) at *Association* events.
2. Apart from exhibiting at *Association* events or on *Association* platforms, the Members may use their position on the board in their business marketing material during their time of service on the board.

#### **Article V: Records of Proceedings**

The minutes of the board or committee meeting shall contain:

1. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the name of the financial interest, any action taken to determine whether a conflict of interest was present, and the board's or committee's decision as to whether a conflict of interest in fact existed.
2. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

#### **Article VI: Compensation**

The Association shall not pay compensation to any director or member of a committee. Reimbursement of expenses is permissible.

#### **Article VII: Periodic Reviews**

To ensure the Association operates in a manner consistent with tax-exempt purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

1. Whether compensation arrangements and benefits are reasonable, based on competent survey information (i.e.: RFPs, etc.), and the result of arm's length bargaining.

2. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Association's policies, are properly recorded, reflect reasonable investment or payments for goods and services, further tax-exempt purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Print a copy of the Disclosure Form for signing and give the completed form to the Executive Director or Secretary. A digital copy of the completed form is appropriate.

# Appendix L - Sample Conflict of Interest Disclosure Form (For Formal 501(c)3 Affiliates)

## AAGT Conflict of Interest Disclosure Form

All applicants for AAGT Board of Director, member at large and staff positions are required to fully complete this Form and return to the AAGT Executive Director or Secretary in accordance with the current policy entitled “AAGT Conflict of Interest Policy” Print a copy for signing and give the completed form to the Executive Director or Secretary. A digital copy of the completed form is appropriate.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

1. Position with the *Arizona Association for Gifted and Talented* (the “Association”):  
 Association Board Member       Association Member at Large       Association Staff
2. Reason for Disclosure:     Annual Disclosure       Update
3. Please describe below any relationships, transactions, positions you or your Relative holds (volunteer or otherwise), or circumstances that could contribute to a conflict of interest between AAGT and your personal interests, financial or otherwise, as follows:
  - a. Do you or your Relative have a personal or financial interest in a contract, sale, purchase, or service involving the Association?       Yes     No
  - b. If yes, is the interest described in 3(a) that of a(an): (Check all that apply)
    - i.     Non-Salaried officer of a nonprofit corporation involved in such contract, sale, purchase, or service.
    - ii.    Landlord or tenant of the contracting party involved in such contract, sale, purchase, or service.
    - iii.    Attorney of a contracting party involved in such contract, sale, purchase, or service.
    - iv.     Member of a nonprofit cooperative marketing association involved in such contract, sale, purchase, or service.
    - v.      Owner of less than three percent of the shares of a corporation for profit involved in such contract, sale, purchase or service, and the total annual income from dividends, including the value of stock dividends, from the corporation does not exceed five percent of my or my Relative’s total annual income and any other payments made to me or my Relative by the corporation do not exceed five percent of total annual income.
    - vi.     Public officer or employee being reimbursed for actual and necessary expenses incurred in the performance of official duty.
    - vii.    Recipient of public services generally provided by this incorporated city or town, political subdivision or state department, commission, agency, body or board of which I or my Relative is a public officer or employee, on the same terms and conditions as if I or my Relative were not an officer or employee.

- viii.  Public school board member when the relative involved is not a dependent, as defined in A.R.S. section 43-1001, or a spouse.
  - ix.  Public officer or employee, or that of a relative of a public officer or employee, unless the contract or decision involved would confer a direct economic benefit or detriment upon the officer, employee or his relative, of any of the following:
    - 1. Another political subdivision.
    - 2. A public agency of another political subdivision.
    - 3. A public agency except if it is the same governmental entity.
  - x.  Member of a trade, business, occupation, profession or class of persons consisting of at least ten members which is no greater than the interest of the other members of that trade, business, occupation, profession or class of persons.
- c. If you answered "Yes" to 3(a) but checked no boxes in part 3(b), please describe the interest as follows:
- i. Name of entity involved in such contract, sale, purchase, or service: \_\_\_\_\_.
  - ii. Principal purpose of entity: \_\_\_\_\_.
  - iii. Approximate annual value of contract, sale, purchase, or service: \$\_\_\_\_\_. Your (or your Relative's) role with or for this entity: (attach a separate sheet if necessary).  
\_\_\_\_\_
- d. Do you or your Relative have a personal or financial interest in the Association's decision-making?     Yes     No
- e. If yes, is the interest described in 3(d) that of a(an): (Check all that apply)
- i.  Non Salaried officer of a nonprofit corporation involved in such contract, sale, purchase, or service.
  - ii.  Landlord or tenant of the contracting party involved in such contract, sale, purchase, or service.
  - iii.  Attorney of a contracting party involved in such contract, sale, purchase, or service.
  - iv.  Member of a nonprofit cooperative marketing association involved in such contract, sale, purchase, or service.
  - v.  Owner of less than three per cent of the shares of a corporation for profit involved in such contract, sale, purchase or service, and the total annual income from dividends, including the value of stock dividends, from the corporation does not exceed five per cent of my or my Relative's total annual income and any other payments made to me or my Relative by the corporation do not exceed five per cent of total annual income.
  - vi.  Public officer or employee being reimbursed for actual and necessary expenses incurred in the performance of official duty.

- vii.  Recipient of public services generally provided by the incorporated city or town, political subdivision or state department, commission, agency, body or board of which I or my Relative is a public officer or employee, on the same terms and conditions as if I or my Relative were not an officer or employee.
  - viii.  Public school board member when the relative involved is not a dependent, as defined in section A.R.S. 43-1001, or a spouse.
  - ix.  Public officer or employee, or that of a relative of a public officer or employee, unless the contract or decision involved would confer a direct economic benefit or detriment upon the officer, employee or his relative, of any of the following:
    - 1. Another political subdivision.
    - 2. A public agency of another political subdivision.
    - 3. A public agency except if it is the same governmental entity.
  - x.  Member of a trade, business, occupation, profession or class of persons consisting of at least ten members which is no greater than the interest of the other members of that trade, business, occupation, profession or class of persons.
- f. If you answered "Yes: to 3(d) but checked no boxes in part 3(e), please answer the following:
- i. I or my Relative has a financial interest in the Association's decisions.  Yes/ No
  - ii. If Yes, please describe: (attach a separate sheet if necessary)
- 
- 
- iii. I or my Relative has a personal interest in the Association's decisions.  Yes/ No
  - iv. If Yes, please describe: (attach a separate sheet if necessary).
- 
- 

I hereby certify that the information set forth above is true and complete to the best of my knowledge. I have reviewed and do agree to abide by the AAGT Conflict of Interest Policy.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

*An electronic signature and digital copy of the signed and completed form are appropriate options to give to the Executive Director or Secretary.*

## **Appendix M - Sample Document Retention & Destruction Policy (For Formal 501(c)3 Affiliates)**

### **AAGT Document Retention and Destruction Policy**

*Purpose: To identify the record retention and destruction responsibilities of staff, volunteers, members of the Board of Directors, and third parties for maintaining and documenting the storage and destruction of documents and records for the Arizona Association for Gifted and Talented (the "Association").*

1. Rules. The Association's staff, volunteers, members of the Board of Directors and third parties (i.e., independent contractors under contract with the Association) are required to comply with these rules:
  - a. Paper or electronic documents listed under the terms for retention in Section 2 below will be transferred and maintained by the Executive Director or Secretary, or in the case of legal documents, by the Association's attorneys;
  - b. All other paper documents may be destroyed after three years;
  - c. All other electronic documents may be deleted from all individual computers, databases, networks, and back-up storage after one year; and
  - d. No paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.
2. Terms for Retention.
  - a. Retain permanently:
    - i. Governance records – Articles of Incorporation and amendments, Constitution and Bylaws, other organizational documents, governing board and board committee minutes.
    - ii. Tax records – Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax audits.
    - iii. Intellectual property records – Copyright and trademark registrations and samples of protected (logo, etc.)
    - iv. Works. Financial records – Yearly audited financial statements, attorney contingent liability letters, including Association sponsored events records (attendance, cost, revenue, location, etc.)
  - b. Retain for twenty-one years:

- i. Records for anything relating to services for children, including photo release forms, teacher contracts for those who teach children’s classes at Association events, etc.
  - c. Retain for ten years:
    - i. Government relations records – Advocacy Task Force Annual Summary
  - d. Retain for three years:
    - i. Employee/employment records – Employee names, addresses, social security numbers, dates of birth, INS Form I-9, resume/application materials, job descriptions, dates of hire and termination/separation, evaluations, compensation information, promotions, transfers, disciplinary matters, time/payroll records, leave/comp time/FMLA, engagement and discharge correspondence, documentation of basis for independent contractor status (retain for all current employees and independent contractors and for three years after the departure of each individual).
    - ii. Lease, insurance, and contract/license records – Software license agreements, vendor, hotel, and service agreements, independent contractor agreements, employment agreements, consultant agreements, and all other agreements (retain during the term of the agreement and for three years after the termination, expiration, non-renewal of each agreement).
    - iii. All other electronic records, documents and files – Correspondence files, including Association emails of current and past board members, receipts, past budgets, bank statements, publications, employee manuals/policies and procedures, survey information. These items may be archived but not deleted. They are to be retained for all Directors, current employees and independent contractors for three years after the departure of each individual.

3. Exceptions. Exceptions to these rules and terms for retention may be granted only by the Association’s Executive Director or the President.

This policy should be annually reviewed and individually signed by members of the AAGT Board of Directors and its employees.

Print Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

## **Appendix N - Sample Whistleblower Policy (For Formal 501(c)3 Affiliates)**

### **AAGT Whistleblower Policy**

*Purpose: To ensure Arizona Association for Gifted and Talented is operating in a highly principled, ethical and legal manner.*

This Policy is intended to provide protections for members of the Board of Directors, members at large of AAGT, contractors, or employees if one raises the following concerns (referred to as “Suspected Violations”) regarding the Association:

- incorrect financial reporting, accounting or audit procedures;
- unlawful activity or illegal policies;
- activities of management or volunteer leadership, which otherwise amount to serious improper conduct.

**NO RETALIATION:** No Director, contractor, employee or member who in good faith reports a Suspected Violation shall suffer harassment, retaliation, or adverse employment consequence. A Director, contractor, employee or member who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment, membership or role on the AAGT Board. This Whistleblower Policy is intended to encourage and enable members and others to raise serious concerns within the Association prior to seeking resolution outside the Association.

**REPORTING VIOLATIONS:** The Director, contractor, employee or member is required to share their questions, concerns, suggestions or complaints first in a private meeting with the Executive Director and President. For suspected fraud, or when you are not satisfied with the results of the private meeting, individuals should contact the Association’s attorney. This attorney may be a member of the board or the Association may retain an outside attorney.

**ACTING IN GOOD FAITH:** Anyone filing a complaint concerning a Suspected Violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

**CONFIDENTIALITY:** Reports of Suspected Violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

**HANDLING OF REPORTED VIOLATIONS:** All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation.

This policy should be annually reviewed and individually signed by members of the AAGT Board of Directors and its employees.

Print Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

## Appendix O. AAGT Affiliate Chapter Agreement Form

<p>Formal AAGT Affiliate Chapter Membership Packet Check-list:</p> <ol style="list-style-type: none"> <li>1. Completed Membership Agreement</li> <li>2. Copy of Bylaws</li> <li>3. Annual Financial Report</li> <li>4. Membership &amp; Activity Report</li> <li>5. The AAGT membership fee</li> </ol>	<p>Informal AAGT Affiliate Chapter Membership Packet Check-list:</p> <ol style="list-style-type: none"> <li>1. Completed Membership Agreement</li> <li>2. Copy of Bylaws</li> <li>3. Membership &amp; Activity Report, if appropriate for your group</li> </ol>
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### Arizona Association for the Gifted and Talented Formal & Informal Affiliate Chapter Membership Agreement



Submit this completed form annually to AAGT along with required attachments to: AAGT, 2473 S. Higley Rd, Suite 104, PMB 420, Gilbert, AZ 85295.  
Questions? Contact: [officemanager@azgifted.com](mailto:officemanager@azgifted.com).

Name of Organization: \_\_\_\_\_ Date: \_\_\_\_\_

Group Name Acronym: \_\_\_\_\_ Type of Group (e.g. parent, coordinator): \_\_\_\_\_

Check one: (  ) Formal AAGT Affiliate (  ) Informal AAGT Affiliate

Contact Person: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Total number of members as of date of agreement: \_\_\_\_\_

School district(s) in which your members reside: \_\_\_\_\_

County in which your members reside: \_\_\_\_\_

Legislative district(s) in which your members reside: \_\_\_\_\_

AAGT Liaison/Legislation Contact person of your group (name, phone, & email for legislative action):  
\_\_\_\_\_

Annual dues enclosed, made payable to AAGT:

Formal AAGT Affiliate:  New (\$50)  Renewal (\$50) Informal AAGT Affiliate:  none

Your group's mission statement:

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*Your organization should review its mission/goals and bylaws annually to revitalize your activities and focus your efforts effectively. Check to see that your bylaws and your current procedures are in line with one another, and it is suggested that you keep a notebook of your business meeting minutes, bylaws, activities, etc.*

Affiliate Bylaws: please check one

- No changes have been made to our bylaws since we last submitted a copy to AAGT.
- We have already forwarded a revised copy of our bylaws. Date forwarded: \_\_\_\_\_
- We are attaching a current copy of our bylaws as revised/amended.

For Formal AAGT Affiliates

Our group is an **incorporated** 501(c)3 OR  Our group is an **unincorporated** non-profit and we have also affiliated with our school district.

Federal Employer Identification Number (EIN) Information: please check and complete one:

- Our organization's EIN # is \_\_\_\_\_.
- Our organization's EIN # was applied for on \_\_\_\_\_ and will be sent to AAGT as soon as we receive it from the Internal Revenue Service.
- Our organization has previous 501(c)3 non-profit status. Our Tax ID number is \_\_\_\_\_ and a copy of our previous Federal Tax Exempt Letter is attached or on file with AAGT.
- Our organization will not be collecting dues.

Ways your group communicates with:

Members: \_\_\_\_\_

School District: \_\_\_\_\_

Community: \_\_\_\_\_

Electronic-newsletter? \_\_\_Yes \_\_\_No      Number of times per year \_\_\_\_\_

**\*\*Please add AAGT addresses to your distribution list (see item 6 for details).**

Your group's website url: \_\_\_\_\_

Your group's **Social Media Report:**

Social Media Platform URL	Total Number of Current Subscribers	Percentage of Increase from Last Year's Report

What are the three most important ways AAGT can assist you in the coming year?

What issues are you most concerned about?

**OFFICERS (minimum of three required)**

Name:	Position:	Is a current AAGT Member <input type="checkbox"/>
Phone:	Email:	
Address:		
School District:	County:	Legislative District:
Signature:	Check to subscribe to the AAGT CAN List: <input type="checkbox"/>	
Name:	Position:	Is a current AAGT Member <input type="checkbox"/>
Phone:	Email:	
Address:		
School District:	County:	Legislative District:
Signature:	Check to subscribe to the AAGT CAN List: <input type="checkbox"/>	
Name:	Position:	Is a current AAGT Member <input type="checkbox"/>
Phone:	Email:	
Address:		
School District:	County:	Legislative District:
Signature:	Check to subscribe to the AAGT CAN List: <input type="checkbox"/>	

Name:	Position:	Is a current AAGT Member <input type="checkbox"/>
Phone:	Email:	
Address:		
School District:	County:	Legislative District:
Signature:	Check to subscribe to the AAGT CAN List: <input type="checkbox"/>	

By signing below as a duly authorized representative of our organization, we, the \_\_\_\_\_, (referred to below as “our organization”) agree to the following:

1. If a Formal AAGT Affiliate, to abide by the bylaws of Arizona Association for Gifted and Talented (AAGT) and the bylaws of our organization in order to meet group exemption requirements under Section 501(c)3 of the Internal Revenue Code for tax exemption purposes; If an Informal AAGT Affiliate, to abide by the bylaws of Arizona Association for Gifted and Talented (AAGT) and the bylaws of our organization.
2. Have our own bylaws in accordance with the purpose of AAGT bylaws (copy available at <http://arizonagifted.org>), elect our own officers, and organize our own programs;
3. Maintain the integrity of the purposes and goals of AAGT and support policy and programs adopted by the AAGT Board of Directors;
4. Authorize our organization’s name to be used by AAGT as an Affiliate Chapter of the state organization (for example, on the AAGT website or in a newsletter);
5. Send a representative to all AAGT Affiliates meetings that are required;
6. Send copies of our organization’s newsletters to the AAGT ([officemanager@azgifted.com](mailto:officemanager@azgifted.com)).
7. Submit in a timely manner the AAGT Affiliate Chapter Agreement upon first time application and each year thereafter to renew affiliation. If a Formal AAGT Affiliate, will also submit all forms required by the IRS, including annual completion of IRS Form 990-N;
8. Be in full compliance with the requirements of the AAGT Bylaws and this agreement, and in the event that AAGT notifies our officers in writing of noncompliance, come into full compliance within thirty (30) days of the date of the written notice or understand that the AAGT Board of Directors may revoke our charter as an affiliate chapter;
9. Distribute, in the event of dissolution of our organization, all monies and other assets, real and personal, of the organization to the AAGT Board of Directors to be held in trust until such time as the affiliate chapter is reorganized, up to five years, at which time monies will be absorbed by AAGT.
10. Indemnify AAGT, its directors and officers, and hold them harmless from any payments, losses, damages, penalties, claims, judgments, suits, settlements, expenses, and disbursements (including reasonable costs of investigation and attorneys fees) of whatever kind or nature that may be imposed on AAGT, its directors or officers, as a consequence of or in connection with any

activities of our organization or anyone whose acts such organization may be liable or responsible.

AAGT Affiliate Chapter known as \_\_\_\_\_

By its Duly Authorized Representative:

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Please make a copy of this form for your files, attach the documents in the checklist and submit to AAGT.

For OFFICE USE ONLY:

Approved by AAGT Affiliate Coordinator or Executive Director:

\_\_\_\_\_ Date: \_\_\_\_\_

## **Appendix P. Quotes to Share**

Whenever you have the opportunity, share some “quotable quotes” with other parents, educators, and community members. Whether including quotes on the bottom of your emails, on your web page, in your e-newsletter, or at your meetings, this can be a very effective way to subtly and indirectly continue your efforts to educate your community. Here are some of our favorites:

"Students who achieve A's based on what they have already learned are gaining daily practice in underachievement." --Linda Silverman

"Every child deserves an equal opportunity to struggle." (Mary Landrum);

"Expecting all children the same age to learn from the same materials is like expecting all children the same age to wear the same size clothing." (Madeline Hunter);

"You can never hold a person down without staying down with him." (Booker T. Washington);

"Give me rigor or give me mortis!" (Michael Clay Thompson);

"Poor is the pupil who does not surpass his master." (Leonardo da Vinci);

"There is nothing so unequal as the equal treatment of unequals." (Justice Felix Frankfurter);

"The pupil who is never required to do what he cannot do, never does what he can do." (John Stuart Mill).

"Start where the learner is." (John Dewey)

"I have no special talents. I am only passionately curious." (Albert Einstein)

"Education is not the filling of a pail but the lighting of a fire." (John Butler Yeats)

"All of us do not have equal talent, but all of us should have an equal opportunity to develop our talent." (John F. Kennedy [Civil Rights Address](#))

"Until every gifted child can attend a school where the brightest are appropriately challenged in an environment with their intellectual peers, America can't claim that it's leaving no child behind." (Jan & Bob Davidson with Laura Vanderkam, *Genius Denied*)

"One can never consent to creep when one feels an impulse to soar!" (Helen Keller)

"Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." (Margaret Mead)

"Genius without education is like silver in the mine." (Benjamin Franklin)