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A For the 2017 calendar year, or tax year beginning 09-01-2017 , and ending 08-31-2018

OMB No. 1545-1150

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-EZ and its instructions is at www.irs.gov/form990ez.

2017

Open to Public Inspection

A For the 2017 calendar year, or tax year beginning 09-01-2017 , and ending 08-31-2018

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C Name of organization
PARENTAL DEFENSE ALLIANCE OF UTAH

Number and street (or P O box, if mail is not delivered to street address)	Room/suite
528 E 900 N	

City or town, state or province, country, and ZIP or foreign postal code
AMERICAN FORK, UT 840033200

D Employer identification number

20-3373058

E Telephone number

(801) 610-9127

[illegible]

G Accounting Method ☐ Cash ☒ Accrual Other (specify) ▶

H Check ☐ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: ► PARENTALDEFENSE.ORG

J Tax-exempt status(check only one) - ☒ 501(c)(3) ☐ 501(c)() ◀(insert no) ☐ 4947(a)(1) or ☐ 527

K Form of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ. ▶ \$115,779

Part I	Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)
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Check if the organization used Schedule O to respond to any question in this Part I ☒

Revenue		Expenses		Net Assets	
1	Contributions, gifts, grants, and similar amounts received	1	115,378	18	Excess or (deficit) for the year (Subtract line 17 from line 9)
2	Program service revenue including government fees and contracts	2	401	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)
3	Membership dues and assessments	3		20	Other changes in net assets or fund balances (explain in Schedule O)
4	Investment income	4		21	Net assets or fund balances at end of year Combine lines 18 through 20
5a	Gross amount from sale of assets other than inventory	5a			
b	Less cost or other basis and sales expenses	5b			
c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)	5c			
6	Gaming and fundraising events				
a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a			
b	Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b			
c	Less direct expenses from gaming and fundraising events	6c			
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d			
7a	Gross sales of inventory, less returns and allowances	7a			
b	Less cost of goods sold	7b			
c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c			
8	Other revenue (describe in Schedule O)	8			
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶	9	115,779		
10	Grants and similar amounts paid (list in Schedule O)	10			
11	Benefits paid to or for members	11			
12	Salaries, other compensation, and employee benefits	12	50,067		
13	Professional fees and other payments to independent contractors	13	3,474		
14	Occupancy, rent, utilities, and maintenance	14			
15	Printing, publications, postage, and shipping	15	36		
16	Other expenses (describe in Schedule O)	16	61,787		
17	Total expenses. Add lines 10 through 16 ▶	17	115,364		
18	Excess or (deficit) for the year (Subtract line 17 from line 9)	18	415		
19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	33,202		
20	Other changes in net assets or fund balances (explain in Schedule O)	20			
21	Net assets or fund balances at end of year Combine lines 18 through 20	21	33,617		

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 10642I

Form **990-EZ** (2017)

Part II

Balance Sheets (see the instructions for Part II)
Check if the organization used Schedule O to respond to any question in this Part II

	(A) Beginning of year		(B) End of year
22 Cash, savings, and investments	29,564	22	27,027
23 Land and buildings		23	
24 Other assets (describe in Schedule O)	3,638	24	6,590
25 Total assets	33,202	25	33,617
26 Total liabilities (describe in Schedule O).		26	
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	33,202	27	33,617

Part IIIStatement of Program Service Accomplishments (see the instructions for Part III)
Check if the organization used Schedule O to respond to any question in this Part III

What is the organization's primary exempt purpose?
THE PARENTAL DEFENSE ALLIANCE OF UTAH (PDA) IS A NON-PROFIT ORGANIZATION CREATED TO PROVIDE TRAINING AND ASSISTANCE TO ATTORNEYS WHO REPRESENT PARENTS IN UTAH'S CHILD WELFARE PROCEEDINGS SINCE 2005, THE PDA HAS EXCLUSIVELY FULFILLED THE CONTRACT DESCRIBED IN UTAH CODE SECTION 63A-11-104 TO PROVIDE TRAINING, ORGANIZATIONAL AND OTHER RESOURCES TO PARENTAL DEFENDERS ACROSS THE STATE WE RECENTLY RENEWED THAT CONTRACT IN AUGUST OF THIS PAST YEAR, AND WILL HOLD THAT CONTRACT THROUGH 2022 FROM REMOVAL TO REUNIFICATION, OR EVEN AT TERMINATION OF PARENTAL RIGHTS, PARENTAL DEFENSE ATTORNEYS ARE DEDICATED ADVOCATES, WELL-VERSED IN THE LAWS AND PRACTICE OF CHILD WELFARE LAW IN THE JUVENILE COURTS THE PDA IS PROUD TO SUPPORT ITS MEMBERS, AND IS EVER SEEKING TO PROVIDE THEM WITH RESOURCES IN SUBSTANTIVE, NEW, AND CREATIVE WAYS

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title

28
See Additional Data Table

29
(Grants \$) If this amount includes foreign grants, check here

30
(Grants \$) If this amount includes foreign grants, check here

31 Other program services (describe in Schedule O)
(Grants \$) If this amount includes foreign grants, check here

32 Total program service expenses (add lines 28a through 31a)

Expenses
(Required for section 501(c)(3) and 501(c)(4) organizations, optional for others)

28a29a30a31a32111,398

Part IVList of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated — see the instructions for Part IV)
Check if the organization used Schedule O to respond to any question in this Part IV

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) (if not paid, enter -0-)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
KIRSTIN NORMAN	8 00	33,140		
EXECUTIVE DI				
GRANT DICKINSON	1 00	520		
PRESIDENT OF				
CAROL MORTENSEN	1 00	4,800		
PRES ELECT &				
MARK TANNER	1 00	4,800		
BOARD				
MARGARET LINDSAY	1 00	3,019		
BOARD				
J MICHAEL RAWSON	1 00	1,940		
BOARD				
JORDAN PUTMAN	1 00	1,848		
BOARD				
JASON RICHARDS	1 00	0		
BOARD				

Form 990-EZ (2017)

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V ☐

	Yes	No
33 Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O	33	No
34 Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O (see instructions)	34	No
35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a	No
b If "Yes," to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O	35b	
c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III	35c	No
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36	No
37a Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a _____		
b Did the organization file Form 1120-POL for this year?	37b	No
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a	No
b If "Yes," complete Schedule L, Part II and enter the total amount involved	38b	
39 Section 501(c)(7) organizations Enter		
a Initiation fees and capital contributions included on line 9	39a	
b Gross receipts, included on line 9, for public use of club facilities	39b	
40a Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ _____, section 4912 ▶ _____, section 4955 ▶ _____		
b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b	No
c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ _____		
d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax on line 40c reimbursed by the organization ▶ _____		
e All organizations At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e	No
41 List the states with which a copy of this return is filed ▶ _____		
42a The organization's books are in care of ▶ <u>KIRSTIN NORMAN</u> Telephone no ▶ <u>(801) 610-9127</u> Located at ▶ <u>528 E 900 N AMERICAN FORK, UT</u> ZIP + 4 ▶ <u>84003</u>		
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b	No
If "Yes," enter the name of the foreign country ▶ _____		
See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)		
c At any time during the calendar year, did the organization maintain an office outside the U S ?	42c	No
If "Yes," enter the name of the foreign country ▶ _____		
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 43 _____		
44a Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a	No
b Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44b	No
c Did the organization receive any payments for indoor tanning services during the year?	44c	No
d If "Yes," to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	44d	
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a	No
45b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)	45b	No

		Yes	No
46	Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46	No

Part VI Section 501(c)(3) organizations only
All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51.
Check if the organization used Schedule O to respond to any question in this Part VI ☐

		Yes	No
47	Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47	No
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48	No
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a	No
49b	If "Yes," was the related organization a section 527 organization?	49b	

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
NONE				

f Total number of other employees paid over \$100,000 ► _____

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation
NONE		

d Total number of other independent contractors each receiving over \$100,000. ► _____

52 Did the organization complete Schedule A? **NOTE.** All Section 501(c)(3) organizations must attach a completed Schedule A ► ☒ **Yes** ☐ **No**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	***** Signature of officer		2019-03-06 Date		
	KIRSTIN NORMAN EXECUTIVE DIRECTOR Type or print name and title				
Paid Preparer Use Only	Print/Type preparer's name TARINA CHASE CPA	Preparer's signature	Date 2019-03-09	Check <input type="checkbox"/> if self-employed	PTIN P00340608
	Firm's name ► CHASE ACCOUNTING SERVICES PC			Firm's EIN ► 26-0205260	
	Firm's address ► 920 CHAMBERS ST STE 16 OGDEN, UT 844035155			Phone no. (801) 393-1111	

May the IRS discuss this return with the preparer shown above? See instructions ► ☒ **Yes** ☐ **No**

Additional Data

Software ID:
Software Version:
EIN: 20-3373058
Name: PARENTAL DEFENSE ALLIANCE OF UTAH

Form 990EZ, Part III - Statement of Program Service Accomplishments

Describe the organization’s program service accomplishments for each of its three largest program services, as measured by expenses. In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title.		Expenses (Required for section 501(c)(3) and 501(c)(4) organizations; optional for others.)	
<p>28</p> <p>YEAR IN REVIEW FY 2018 WAS A YEAR OF SIGNIFICANT CHANGES AND OPPORTUNITIES FOR THE PDA THE COMPOSITION OF OUR BOARD OF DIRECTORS CHANGED DRASTICALLY AS OUR TWO LONGEST-SERVING MEMBERS MOVED ON TO OTHER OPPORTUNITIES, AND ADJUSTING THE ROLES WITHIN THE BOARD AND SEEKING OUT TALENTED REPLACEMENTS PROVED TO BE A SIGNIFICANT TASK OUR ANNUAL CONFERENCE CONTINUED TO HOST A HIGHER NUMBER OF ATTORNEYS THAN IN PAST YEARS, AND THE MOVE TO A NEW VENUE WHERE ALL PARTICIPANTS COULD BE HOUSED ON A SINGLE PROPERTY WAS VERY WELL-RECEIVED, THOUGH IT BROUGHT NEW CHALLENGES ALONG WITH IT INDEED, WITH THESE VARIOUS SUBSTANTIAL CHANGES OCCURRING IN THE PAST YEAR, THE GREATEST CHALLENGE THE PDA FACED WAS DETERMINING EXACTLY HOW TO ALLOCATE ITS RESOURCES IN ORDER TO MAINTAIN THE SAME LEVEL OF EXCELLENCE IN OUR TRAINING OPPORTUNITIES AND MEMBERS SERVICES, BUT ADJUST FOR ANTICIPATED INCREASED EXPENSES, BOTH EXPERIENCED DURING FY2018 AND THOSE ANTICIPATED BEYOND IN ADDITION TO CONTINUING TO FULFILL OUR MISSION TO PROVIDE THE BEST POSSIBLE TRAINING AND ASSISTANCE TO UTAH'S PARENTAL DEFENSE ATTORNEYS, WE ALSO PURSUED NEW METHODS AND OPPORTUNITIES FOR PROVIDING OUTREACH AND SUPPORT TO OUR MEMBERS, WHICH INCLUDED THE FOLLOWING "PARTNERING WITH THE YOUNG LAWYER DIVISION OF THE UTAH STATE BAR FOR OUR FALL MULTI-HOUR TRAINING EVENT, JUVENILE COURT BOOT CAMP, "WORKING EXTENSIVELY WITH THE INDIGENT DEFENSE COMMISSION TO PROVIDE INPUT TO THE IDC'S CORE PRINCIPLES FOR APPOINTED ATTORNEYS REPRESENTING INDIGENT PARENTS OR LEGAL GUARDIANS IN CHILD WELFARE PROCEEDINGS AND ALIGNING OUR TRAINING PRIORITIES WITH THOSE STANDARDS, AS WELL AS PROVIDING SUPPORT AND INSIGHT FOR ITS NEW PILOT PROGRAMS IMPACTING PARENTAL DEFENSE, "PROVIDING A NUMBER OF IN-PERSON TRAININGS, INCLUDING A SUCCESSFUL ANNUAL CONFERENCE AND RENEWAL OF SEVERAL ONLINE TRAINING OPPORTUNITIES, "UPDATING OUR WEBSITE AND USING OUR BLOG AND EMAILS TO PROVIDE RELEVANT INFORMATION RELATED TO CHILD WELFARE TO OUR MEMBERS AND CONTACTS, "PARTICIPATING IN TRAININGS BOTH LOCALLY AND NATIONALLY, ALONG WITH OTHER STATEWIDE COMMITTEES RELATED TO CHILD WELFARE, "CONTINUING TO REIMBURSE FUNDS TO ATTORNEYS WHO REPRESENT INDIGENT PARENTS FOR THE PURPOSES OF APPEAL AND EXPERT TESTIMONY, AND "REACHING OUT AS AN ORGANIZATION TO BE INCLUDED IN A ROBUST AND ONGOING NATIONAL DIALOGUE ABOUT THE STATUS OF THE PRACTICE OF PARENTAL DEFENSE, IN OUR JURISDICTION AND OTHERS TRAININGS, SEMINARS AND CONFERENCES ONE OF THE MAIN CHARGES OF THE PDA IS TO PROVIDE TRAINING OPPORTUNITIES FOR CONTINUING LEGAL EDUCATION CREDIT (CLE) TO PARENTAL DEFENSE ATTORNEYS IN THE STATE OF UTAH THIS PAST YEAR WE PROVIDED FOUR DIFFERENT IN-PERSON TRAINING OPPORTUNITIES OCTOBER 13, 2017 EVENT MULTI-HOUR CLE EVENT LOCATION FEDERAL COURT BUILDING, SLC TOPIC JUVENILE COURT BOOT CAMP PRESENTERS GRANT DICKINSON, PDA PRESIDENT, MARK TANNER, PDA TREASURE, KIRSTIN NORMAN, PDA EXECUTIVE DIRECTOR NUMBER OF REGISTRATIONS APPROXIMATELY 38 OUR FALL, MULTI-HOUR CLE EVENT WAS THE JUVENILE COURT BOOT CAMP THE PDA HAD OFFERED A SIMILAR TRAINING OPPORTUNITY IN THE PAST IN CONJUNCTION WITH OUR ANNUAL CONFERENCE THAT WAS VERY WELL RECEIVED, BUT IT HAD BEEN SEVERAL YEARS SINCE A SIMILAR TRAINING HAD BEEN HELD ADDITIONALLY, SEVERAL MEMBERS OF OUR BOARD OF DIRECTORS HAD NOTICED THEY HAD BEEN APPROACHED BY YOUNGER ATTORNEYS IN THE PAST YEAR WITH QUESTIONS ABOUT HOW TO PROCEED IN JUVENILE COURT IN SEEKING TO SERVE THAT TRAINING NEED, BOARD MEMBER JORDAN PUTNAM HAD THE IDEA TO CONTACT THE YOUNG LAWYER DIVISION OF THE UTAH STATE BAR WITH THE PROPOSED IDEA OF DOING A JOINT TRAINING EVENT IN THIS WAY, THE BOARD REASONED WE WOULD BE ABLE TO UTILIZE THE YOUNG LAWYER DIVISION'S IMPRESSIVE OUTREACH CAPABILITIES TO CONNECT WITH ATTORNEYS NEW TO THIS AREA OF LAW, OR THOSE WHO HADN'T EVENT CONSIDERED IT YET THE GOAL WAS TO HOPEFULLY GARNER SOME INTEREST FROM THESE NEWER ATTORNEYS TO DEDICATE A PORTION OF THEIR PRACTICE TO THIS IMPORTANT AND OFTEN UNDER-SERVED AREA OF THE LAW THE EVENT WAS ADVERTISED BOTH THROUGH THE PDA'S TRADITIONAL CHANNELS (OUR EMAIL BLASTS, WEBSITE, AND BLOG) AND THROUGH THE YOUNG LAWYER DIVISION OF THE BAR'S EMAIL ANNOUNCEMENTS WE HAD APPROXIMATELY 30 PEOPLE ATTEND THIS IN-PERSON TRAINING EVENT, WITH ROUGHLY HALF COMING FROM OUR PDA MEMBERSHIP AND HALF FROM THE YOUNG LAWYER DIVISION OF THE BAR IN-PERSON FEEDBACK WAS VERY POSITIVE IT WAS CHALLENGING TO HAVE ANY KIND OF FORMAL SURVEY FOR THIS EVENT AS WE DID NOT HAVE A WAY TO POLL THE PEOPLE WHO ATTENDED THE EVENT FROM THE YOUNG LAWYER DIVISION HOWEVER, AS A DIRECT RESULT OF THE TRAINING EVENT, NEW PARENTAL DEFENDERS WERE ABLE TO SET UP ADDITIONAL MEETINGS WITH MEMBERS OF THE BOARD OF DIRECTORS TO ANSWER PRACTICE QUESTION AND FURTHER PROVIDE GUIDANCE IN THIS NEW AREA OF THEIR PRACTICE THE PDA RECEIVED APPROVAL FOR 2 HOURS OF CLE CREDIT FOR THE EVENT FROM THE UTAH BAR THE SUCCESS OF THE EVENT ENCOURAGED THE BOARD TO CONSIDER ADDITIONAL PARTNERSHIPS FOR FUTURE PDA TRAINING EVENTS APRIL 19-20, 2018 EVENT ANNUAL PARENTAL DEFENSE CONFERENCE LOCATION THE GRAND SUMMIT HOTEL, PARK CITY, UT NUMBER OF REGISTRATIONS 165 PRESENTERS "KEYNOTE SPARKING A REVOLUTION OF VALUES HOW FAMILY DEFENSE LAWYERS CAN USE DATA, STORIES, AND ADVOCACY TO CHANGE THE CHILD WELFARE SYSTEM'S APPROACH TO FAMILIES BY VIVEK S SANKARAN, JD, AND CHRISTOPHER CHURCH, JD, MS "APPEALS SKILLS TRAINING AND CASE LAW UPDATE BY J FREDERIC VOROS, MARY WESTBY, MARGARET LINDSAY, AND JANELL BRYAN "MOVING THE NEEDLE FORWARD SUPPORTING PARENTAL DEFENSE PROVIDERS THROUGH STATE GRANTS, PRACTICE GUIDELINES, AND INNOVATIVE PILOT PROJECTS BY JOJO LIU, ASSISTANT DIRECTOR OF THE INDIGENT DEFENSE COMMISSION, AND SHERYL ST CLAIR, DEFENSE SIDE SOCIAL WORKER "CHILD WELFARE MEDIATION ACROSS THE STATE-WHAT WORKS, WHAT DOESN'T PARENTAL DEFENDERS AND MEDIATORS SHARE EFFECTIVE STRATEGIES BY BEV KLUNGERVIK AND NINI RICH "BREAKOUT PRESENTATION BODY LANGUAGE BY JEFF BAIRD "BREAKOUT PRESENTATION TECH ETHICS- A RISING STANDARD OF CARE BY LINCOLN MEAD BY GRANT DICKINSON, PDA BOARD OF DIRECTORS "ASSESSING NEEDS AND RISKS OF CLIENTS BY LISA LOKKEN OF LOKKEN & ASSOCIATES, P C "WHAT THE HECK IS A SHELTER HEARING? A CLIENT'S PERSPECTIVE BY FORMER PARENT CLIENT CRYSTAL RANDALL AND MICHAEL RAWSON OF THE PDA BOARD OF DIRECTORS BY MARY WESTBY, STAFF ATTORNEY FOR THE UTAH COURT OF APPEALS "INNOVATIVE MOTION PRACTICE BY JASON RICHARDS "PROFESSIONALISM AND CIVILITY CHALLENGE BY GRANT DICKINSON, PDA BOARD OF DIRECTORS "LEGISLATIVE UPDATE BY SENATOR TODD WEILER THIS YEAR, WE CONTINUED TO HAVE LARGER CONFERENCE REGISTRATION AND ATTENDANCE THAN IN PREVIOUS YEARS WE HAD 165 PERSONS REGISTER (SLIGHTLY LESS THAN LAST YEAR'S HIGH-WATER MARK OF 171) ADDITIONALLY, OF THOSE 165 REGISTRANTS, 160 ACTUALLY ATTENDED, WHICH REPRESENTS THE HIGHEST PERCENTAGE EVER OF REGISTRATIONS WHO ACTUALLY ATTENDED THE CONFERENCE ONE OF THE MOST CRITICAL DECISIONS WE MADE THIS YEAR TO ADDRESS THE GROWING SIZE OF THE CONFERENCE WAS TO CHANGE VENUES MANY OF THE SURVEYS FROM LAST YEAR INDICATED THAT IT WOULD BE GREATLY PREFERRED IF ALL ATTENDEES COULD BE HOUSED ON A SINGLE PROPERTY, RATHER THAN HAVING A SECOND OVERFLOW PROPERTY BE UTILIZED BY THOSE LATE TO SIGN UP FOR THE CONFERENCE THIS MAKES SENSE, AS ONE OF THE MOST USEFUL VALUES THAT THE CONFERENCE PROVIDES IS THE OPPORTUNITY FOR PRACTITIONERS TO NETWORK WITH ATTORNEYS FROM ACROSS THE STATE WITHOUT INTERRUPTION THOSE WHO WERE HOUSED AT AN OVERFLOW PROPERTY IN THE PAST DIDN'T HAVE AS GREAT AN OPPORTUNITY TO COMMUNICATE WITH THEIR PEERS DURING THE CONFERENCE DUE TO THE NEED TO BE SHUTTLED BACK AND FORTH ACCORDINGLY, WE MADE THE MOVE TO A LARGER, NICER VENUE AT THE GRAND SUMMIT IN PARK CITY, UTAH SURVEYS INDICATE THE CHANGE WAS VERY FAVORABLY RECEIVED BY OUR MEMBERS 93 4% OF THOSE SURVEYED APPROVED OF THE CHANGE IN VENUE (WITH 63% RATING THE VENUE "EXCELLENT- AND 30 4% RATING IT "GOOD") AND 89 1% OF THOSE SURVEYED INDICATING THEY APPROVED OF THE MOVE TO PARK CITY FROM MIDWAY FOR THE CONFERENCE LOCATION OF THOSE SURVEYED, 6 5% REPORTED THAT THIS WAS THE FIRST YEAR THEY HAD ATTENDED THE CONFERENCE, WHICH IS MUCH LESS THAN PREVIOUS YEARS, WHICH TENDED TO HOVER BETWEEN 15-18% THIS IS ENCOURAGING, BECAUSE IT MEANS AS AN ORGANIZATION, THOSE WHO REALLY NEED THIS TRAINING ARE FINDING IT USEFUL, AND ATTEND THE CONFERENCE YEAR AFTER YEAR IT ALSO MEANS THAT THE CONTINUED HIGHER ATTENDANCE REPRESENTS ATTORNEYS WHO FIND THIS TRAINING USEFUL TO THEIR PRACTICE, AND ATTEND ROUTINELY, RATHER THAN THOSE WHO HAPPEN TO STUMBLE ON OUR VERY AFFORDABLE CLE OPPORTUNITIES ALL OF THESE FACTORS ENCOURAGE THE BOARD THAT THE FOCUS AND QUALITY OF THE CONFERENCE IS RESONATING WELL WITH OUR MEMBERS OUR FEEDBACK FOR THIS YEAR'S CONFERENCE WAS OVERWHELMINGLY POSITIVE 95 6% OF THOSE SURVEYED RATED THE CONFERENCE AS EITHER "EXCELLENT- OR "GOOD," WHICH IS A 5 6% INCREASE FROM LAST YEAR AGAIN, PARTICIPANTS FAVORED THE FRONT-LOADED FORMAT OF HAVING THE FIRST DAY BE LONGER AND THE SE</p> <p>(Grants \$) If this amount includes foreign grants, check here . . . ► <input type="checkbox"/></p>		28a	111,398

SCHEDULE A
(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2017

Open to Public Inspection

Name of the organization
PARENTAL DEFENSE ALLIANCE OF UTAH

Employer identification number
20-3373058

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 12, check only one box)

- 1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2

☐

A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ))
- 3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state _____
- 5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II)
- 6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II)
- 8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)
- 9

☐

An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture See instructions Enter the name, city, and state of the college or university _____
- 10

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2)**. (Complete Part III)
- 11

☐

An organization organized and operated exclusively to test for public safety See **section 509(a)(4)**.
- 12

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g
- a

☐

Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**
- b

☐

Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**
- c

☐

Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**
- d

☐

Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**
- e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization
- f

Enter the number of supported organizations _____
- g

Provide the following information about the supported organization(s)

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv), 170(b)(1)(A)(vi), and 170(b)(1)(A)(ix)

(Complete only if you checked the box on line 5, 7, 8, or 9 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support							
	Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1	Gifts, grants, contributions, and membership fees received (Do not include any "unusual grant ")	109,844	138,173	131,178	121,114	115,378	615,687
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3	The value of services or facilities furnished by a governmental unit to the organization without charge						
4	Total. Add lines 1 through 3	109,844	138,173	131,178	121,114	115,378	615,687
5	The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6	Public support. Subtract line 5 from line 4						615,687

Section B. Total Support							
Calendar year (or fiscal year beginning in) ►		(a)2013	(b)2014	(c)2015	(d)2016	(e)2017	(f)Total
7	Amounts from line 4	109,844	138,173	131,178	121,114	115,378	615,687
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9	Net income from unrelated business activities, whether or not the business is regularly carried on						
10	Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI)						
11	Total support. Add lines 7 through 10						615,687
12	Gross receipts from related activities, etc (see instructions)					12	
13	First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ► <input type="checkbox"/>						

Section C. Computation of Public Support Percentage		
14	Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f))	14 100.000 %
15	Public support percentage for 2016 Schedule A, Part II, line 14	15 100.000 %
16a	33 1/3% support test—2017. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input checked="" type="checkbox"/>	
b	33 1/3% support test—2016. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>	
17a	10%-facts-and-circumstances test—2017. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>	
b	10%-facts-and-circumstances test—2016. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>	
18	Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>	

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ► ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f))	15	
16 Public support percentage from 2016 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f))	17	
18 Investment income percentage from 2016 Schedule A, Part III, line 17	18	

19a 33 1/3% support tests—2017. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☐

b 33 1/3% support tests—2016. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► ☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>	1	
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>	2	
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>	3a	
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>	3b	
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>	3c	
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>	4a	
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>	4b	
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>	4c	
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>	5a	
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b	
c Substitutions only. Was the substitution the result of an event beyond the organization's control?	5c	
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>	6	
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>	7	
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>	8	
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>	9a	
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>	9b	
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>	9c	
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>	10a	
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>	10b	

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
b A family member of a person described in (a) above?		
c A 35% controlled entity of a person described in (a) or (b) above? <i>If "Yes" to a, b, or c, provide detail in Part VI</i>		
	11a	
	11b	
	11c	

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
	1	
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.</i>		
	2	

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		
	1	

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
	1	
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization (s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
	2	
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		
	3	

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)		
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test. Answer (a) and (b) below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	Yes	No
	2a	
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
	2b	
3 Parent of Supported Organizations. Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>Provide details in Part VI.</i>		
	3a	
b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		
	3b	

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1** ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI) **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3	4		
5 Depreciation and depletion	5		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
8 Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8		
Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)	1		
a Average monthly value of securities	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
e Discount claimed for blockage or other factors (explain in detail in Part VI)			
2 Acquisition indebtedness applicable to non-exempt use assets	2		
3 Subtract line 2 from line 1d	3		
4 Cash deemed held for exempt use Enter 1-1/2% of line 3 (for greater amount, see instructions)	4		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6 Multiply line 5 by .035	6		
7 Recoveries of prior-year distributions	7		
8 Minimum Asset Amount (add line 7 to line 6)	8		
Section C - Distributable Amount			Current Year
1 Adjusted net income for prior year (from Section A, line 8, Column A)	1		
2 Enter 85% of line 1	2		
3 Minimum asset amount for prior year (from Section B, line 8, Column A)	3		
4 Enter greater of line 2 or line 3	4		
5 Income tax imposed in prior year	5		
6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6		
7 <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)			

Part V

Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions			Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes			
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity			
3 Administrative expenses paid to accomplish exempt purposes of supported organizations			
4 Amounts paid to acquire exempt-use assets			
5 Qualified set-aside amounts (prior IRS approval required)			
6 Other distributions (describe in Part VI) See instructions			
7 Total annual distributions. Add lines 1 through 6			
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions			
9 Distributable amount for 2017 from Section C, line 6			
10 Line 8 amount divided by Line 9 amount			

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2017	(iii) Distributable Amount for 2017
1 Distributable amount for 2017 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2017 (reasonable cause required-- explain in Part VI) See instructions			
3 Excess distributions carryover, if any, to 2017			
a			
b From 2013.			
c From 2014.			
d From 2015.			
e From 2016.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2017 distributable amount			
i Carryover from 2012 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2017 from Section D, line 7 \$			
a Applied to underdistributions of prior years			
b Applied to 2017 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2017, if any Subtract lines 3g and 4a from line 2 If the amount is greater than zero, explain in Part VI See instructions			
6 Remaining underdistributions for 2017 Subtract lines 3h and 4b from line 1 If the amount is greater than zero, explain in Part VI See instructions			
7 Excess distributions carryover to 2018. Add lines 3j and 4c			
8 Breakdown of line 7			
a Excess from 2013.			
b Excess from 2014.			
c Excess from 2015.			
d Excess from 2016.			
e Excess from 2017.			

Additional Data

Software ID:

Software Version:

EIN: 20-3373058

Name: PARENTAL DEFENSE ALLIANCE OF UTAH

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10, Part II, line 17a or 17b, Part III, line 12, Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c, Part IV, Section B, lines 1 and 2, Part IV, Section C, line 1, Part IV, Section D, lines 2 and 3, Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b, Part V, line 1, Part V, Section B, line 1e, Part V Section D, lines 5, 6, and 8, and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions)

Facts And Circumstances Test

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Name of the organization
PARENTAL DEFENSE ALLIANCE OF UTAH

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at
www.irs.gov/form990.

OMB No 1545-0047

2017

**Open to Public
Inspection**

Employer identification number

20-3373058

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990-EZ, PART I, LINE 16	EXPENSES SUPPLIES & COPIES 108 STATE REGISTRATION 13 TRAINING 83 BANK CHARGES 23 OFFICE SUPPLIES 126 ADMINISTRATIVE HELP 373 WEBSITE MAINTENANCE 1,303 TRAVEL & MEETINGS 4,770 ANNUAL CONFERENCE 54,564 WORKERS COMP 424 TOTAL 61,787

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART II, LINE 24	ACCOUNTS RECEIVABLE 3,638 6,590 TOTAL 3,638 6,590

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990-EZ, PART III	WE HAVE AN OVERSIGHT COMMITTEE THAT OVERSEES OUR CONTRACT WITH THE STATE THE COMMITTEE IS COMPILED OF PUBLIC AND PRIVATE CITIZENS WHO HAVE AN INTEREST IN THE CHILD WELFARE SYSTEM THE COMMITTEE INCLUDES ONE STATE SENATOR, AND THE DEPUTY DIRECTOR OF THE DEPT OF ADMINISTRATIVE SERVICES, AS WELL AS THE EXECUTIVE DIRECTOR OF THE GUARDIAN AD LITEM'S OFFICE & THE DEPARTMENT HEAD FOR THE DIVISION OF CHILD WELFARE IN THE ATTORNEY GENERAL'S OFFICE

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990-EZ, PART III	<p>THE PARENTAL DEFENSE ALLIANCE OF UTAH (PDA) IS A NON-PROFIT ORGANIZATION CREATED TO PROVIDE TRAINING AND ASSISTANCE TO ATTORNEYS WHO REPRESENT PARENTS IN UTAH'S CHILD WELFARE PROCEEDINGS SINCE 2005, THE PDA HAS EXCLUSIVELY FULFILLED THE CONTRACT DESCRIBED IN UTAH CODE SECTION 63A-11- 104 TO PROVIDE TRAINING, ORGANIZATIONAL AND OTHER RESOURCES TO PARENTAL DEFENDERS ACROSS THE STATE WE RECENTLY RENEWED THAT CONTRACT IN AUGUST OF THIS PAST YEAR, AND WILL HOLD THAT CONTRACT THROUGH 2022 FROM REMOVAL TO REUNIFICATION, OR EVEN AT TERMINATION OF PARENTAL RIGHTS, PARENTAL DEFENSE ATTORNEYS ARE DEDICATED ADVOCATES, WELL-VERSED IN THE LAWS AND PRACTICE OF CHILD WELFARE LAW IN THE JUVENILE COURTS THE PDA IS PROUD TO SUPPORT ITS MEMBERS, AND IS EVER SEEKING TO PROVIDE THEM WITH RESOURCES IN SUBSTANTIVE, NEW, AND CREATIVE WAYS</p>

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990- EZ, PART III, LINE 28	<p>YEAR IN REVIEW FY 2018 WAS A YEAR OF SIGNIFICANT CHANGES AND OPPORTUNITIES FOR THE PDA. THE COMPOSITION OF OUR BOARD OF DIRECTORS CHANGED DRASTICALLY AS OUR TWO LONGEST-SERVING MEMBERS MOVED ON TO OTHER OPPORTUNITIES, AND ADJUSTING THE ROLES WITHIN THE BOARD AND SEEKING OUT TALENTED REPLACEMENTS PROVED TO BE A SIGNIFICANT TASK. OUR ANNUAL CONFERENCE CONTINUED TO HOST A HIGHER NUMBER OF ATTORNEYS THAN IN PAST YEARS, AND THE MOVE TO A NEW VENUE WHERE ALL PARTICIPANTS COULD BE HOUSED ON A SINGLE PROPERTY WAS VERY WELL-RECEIVED, THOUGH IT BROUGHT NEW CHALLENGES ALONG WITH IT. INDEED, WITH THESE VARIOUS SUBSTANTIAL CHANGES OCCURRING IN THE PAST YEAR, THE GREATEST CHALLENGE THE PDA FACED WAS DETERMINING EXACTLY HOW TO ALLOCATE ITS RESOURCES IN ORDER TO MAINTAIN THE SAME LEVEL OF EXCELLENCE IN OUR TRAINING OPPORTUNITIES AND MEMBERS SERVICES, BUT ADJUST FOR ANTICIPATED INCREASED EXPENSES, BOTH EXPERIENCED DURING FY2018 AND THOSE ANTICIPATED BEYOND. IN ADDITION TO CONTINUING TO FULFILL OUR MISSION TO PROVIDE THE BEST POSSIBLE TRAINING AND ASSISTANCE TO UTAH'S PARENTAL DEFENSE ATTORNEYS, WE ALSO PURSUED NEW METHODS AND OPPORTUNITIES FOR PROVIDING OUTREACH AND SUPPORT TO OUR MEMBERS, WHICH INCLUDED THE FOLLOWING: "PARTNERING WITH THE YOUNG LAWYER DIVISION OF THE UTAH STATE BAR FOR OUR FALL MULTI-HOUR TRAINING EVENT, JUVENILE COURT BOOT CAMP, "WORKING EXTENSIVELY WITH THE INDIGENT DEFENSE COMMISSION TO PROVIDE INPUT TO THE IDC'S CORE PRINCIPLES FOR APPOINTED ATTORNEYS REPRESENTING INDIGENT PARENTS OR LEGAL GUARDIANS IN CHILD WELFARE PROCEEDINGS AND ALIGNING OUR TRAINING PRIORITIES WITH THOSE STANDARDS, AS WELL AS PROVIDING SUPPORT AND INSIGHT FOR ITS NEW PILOT PROGRAMS IMPACTING PARENTAL DEFENSE, "PROVIDING A NUMBER OF IN-PERSON TRAININGS, INCLUDING A SUCCESSFUL ANNUAL CONFERENCE AND RENEWAL OF SEVERAL ONLINE TRAINING OPPORTUNITIES, "UPDATING OUR WEBSITE AND USING OUR BLOG AND EMAILS TO PROVIDE RELEVANT INFORMATION RELATED TO CHILD WELFARE TO OUR MEMBERS AND CONTACTS, "PARTICIPATING IN TRAININGS BOTH LOCALLY AND NATIONALLY, ALONG WITH OTHER STATE-WIDE COMMITTEES RELATED TO CHILD WELFARE, "CONTINUING TO REIMBURSE FUNDS TO ATTORNEYS WHO REPRESENT INDIGENT PARENTS FOR THE PURPOSES OF APPEAL AND EXPERT TESTIMONY, AND "REACHING OUT AS AN ORGANIZATION TO BE INCLUDED IN A ROBUST AND ONGOING NATIONAL DIALOGUE ABOUT THE STATUS OF THE PRACTICE OF PARENTAL DEFENSE, IN OUR JURISDICTION AND OTHERS. TRAININGS, SEMINARS AND CONFERENCES. ONE OF THE MAIN CHARGES OF THE PDA IS TO PROVIDE TRAINING OPPORTUNITIES FOR CONTINUING LEGAL EDUCATION CREDIT (CLE) TO PARENTAL DEFENSE ATTORNEYS IN THE STATE OF UTAH. THIS PAST YEAR WE PROVIDED FOUR DIFFERENT IN-PERSON TRAINING OPPORTUNITIES: OCTOBER 13, 2017 EVENT MULTI-HOUR CLE EVENT LOCATION FEDERAL COURT BUILDING, SLC TOPIC JUVENILE COURT BOOT CAMP PRESENTERS GRANT DICKINSON, PDA PRESIDENT, MARK TANNER, PDA TREASURE, KRISTIN NORMAN, PDA EXECUTIVE DIRECTOR. NUMBER OF REGISTRATIONS APPROXIMATELY 38. OUR FALL, MULTI-HOUR CLE EVENT WAS THE JU</p>

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FORM 990-EZ, PART III, LINE 28	<p>VENILE COURT BOOT CAMP THE PDA HAD OFFERED A SIMILAR TRAINING OPPORTUNITY IN THE PAST IN CONJUNCTION WITH OUR ANNUAL CONFERENCE THAT WAS VERY WELL RECEIVED, BUT IT HAD BEEN SEVERAL YEARS SINCE A SIMILAR TRAINING HAD BEEN HELD ADDITIONALLY, SEVERAL MEMBERS OF OUR BOARD OF DIRECTORS HAD NOTICED THEY HAD BEEN APPROACHED BY YOUNGER ATTORNEYS IN THE PAST YEAR WITH QUESTIONS ABOUT HOW TO PROCEED IN JUVENILE COURT IN SEEKING TO SERVE THAT TRAINING NEED, BOARD MEMBER JORDAN PUTNAM HAD THE IDEA TO CONTACT THE YOUNG LAWYER DIVISION OF THE UTAH STATE BAR WITH THE PROPOSED IDEA OF DOING A JOINT TRAINING EVENT IN THIS WAY, THE BOARD REASONED WE WOULD BE ABLE TO UTILIZE THE YOUNG LAWYER DIVISION'S IMPRESSIVE OUTREACH CAP ABILITIES TO CONNECT WITH ATTORNEYS NEW TO THIS AREA OF LAW, OR THOSE WHO HADN'T EVEN CONSIDERED IT YET THE GOAL WAS TO HOPEFULLY GARNER SOME INTEREST FROM THESE NEWER ATTORNEYS TO DEDICATE A PORTION OF THEIR PRACTICE TO THIS IMPORTANT AND OFTEN UNDER-SERVED AREA OF THE LAW THE EVENT WAS ADVERTISED BOTH THROUGH THE PDA'S TRADITIONAL CHANNELS (OUR EMAIL BLISTS, WEBSITE, AND BLOG) AND THROUGH THE YOUNG LAWYER DIVISION OF THE BAR'S EMAIL ANNOUNCEMENTS WE HAD APPROXIMATELY 30 PEOPLE ATTEND THIS IN-PERSON TRAINING EVENT, WITH ROUGHLY HALF COMING FROM OUR PDA MEMBERSHIP AND HALF FROM THE YOUNG LAWYER DIVISION OF THE BAR IN-PERSON FEEDBACK WAS VERY POSITIVE IT WAS CHALLENGING TO HAVE ANY KIND OF FORMAL SURVEY FOR THIS EVENT AS WE DID NOT HAVE A WAY TO POLL THE PEOPLE WHO ATTENDED THE EVENT FROM THE YOUNG LAWYER DIVISION HOWEVER, AS A DIRECT RESULT OF THE TRAINING EVENT, NEW PARENTAL DEFENDERS WERE ABLE TO SET UP ADDITIONAL MEETINGS WITH MEMBERS OF THE BOARD OF DIRECTORS TO ANSWER PRACTICE QUESTION AND FURTHER PROVIDE GUIDANCE IN THIS NEW AREA OF THEIR PRACTICE THE PDA RECEIVED APPROVAL FOR 2 HOURS OF CLE CREDIT FOR THE EVENT FROM THE UTAH BAR THE SUCCESS OF THE EVENT ENCOURAGED THE BOARD TO CONSIDER ADDITIONAL PARTNERSHIPS FOR FUTURE PDA TRAINING EVENTS</p> <p>APRIL 19-20, 2018 EVENT ANNUAL PARENTAL DEFENSE CONFERENCE LOCATION THE GRAND SUMMIT HOTEL, PARK CITY, UT NUMBER OF REGISTRATIONS 165 PRESENTERS "KEYNOTE SPARKING A REVOLUTION OF VALUES HOW FAMILY DEFENSE LAWYERS CAN USE DATA, STORIES, AND ADVOCACY TO CHANGE THE CHILD WELFARE SYSTEM'S APPROACH TO FAMILIES BY VIVEK S SANKARAN, JD, AND CHRISTOPHER CHURCH, JD, MS "APPEALS SKILLS TRAINING AND CASE LAW UPDATE BY J FREDERIC VOROS, MARY WESTBY, MARGARET LINDSAY, AND JANELL BRYAN "MOVING THE NEEDLE FORWARD SUPPORTING PARENTAL DEFENSE PROVIDERS THROUGH STATE GRANTS, PRACTICE GUIDELINES, AND INNOVATIVE PILOT PROJECTS BY JOJO LIU, ASSISTANT DIRECTOR OF THE INDIGENT DEFENSE COMMISSION, AND SHERYL ST CLAIR, DEFENSE SIDE SOCIAL WORKER "CHILD WELFARE MEDIATION ACROSS THE STATE-WHAT WORKS, WHAT DOESN'T PARENTAL DEFENDERS AND MEDIATORS SHARE EFFECTIVE STRATEGIES BY BEV KLUNGVERI K AND NINI RICH "BREAKOUT PRESENTATION BODY LANGUAGE BY JEFF BAIRD "BREAKOUT PRESENTATION TECH ETHICS- A RISING STANDAR</p>

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FORM 990-EZ, PART III, LINE 28	<p>RD OF CARE BY LINCOLN MEAD BY GRANT DICKINSON, PDA BOARD OF DIRECTORS "ASSESSING NEEDS AND RISKS OF CLIENTS BY LISA LOKKEN OF LOKKEN & ASSOCIATES, P C "WHAT THE HECK IS A SHELTER HEARING? A CLIENT'S PERSPECTIVE BY FORMER PARENT CLIENT CRYSTAL RANDALL AND MICHAEL RAWSON OF THE PDA BOARD OF DIRECTORS BY MARY WESTBY, STAFF ATTORNEY FOR THE UTAH COURT OF APPEAL S "INNOVATIVE MOTION PRACTICE BY JASON RICHARDS "PROFESSIONALISM AND CIVILITY CHALLENGE BY GRANT DICKINSON, PDA BOARD OF DIRECTORS "LEGISLATIVE UPDATE BY SENATOR TODD WEILER THIS Y EAR, WE CONTINUED TO HAVE LARGER CONFERENCE REGISTRATION AND ATTENDANCE THAN IN PREVIOUS Y EARS WE HAD 165 PERSONS REGISTER (SLIGHTLY LESS THAN LAST YEAR'S HIGH-WATER MARK OF 171) ADDITIONALLY, OF THOSE 165 REGISTRANTS, 160 ACTUALLY ATTENDED, WHICH REPRESENTS THE HIGHE ST PERCENTAGE EVER OF REGISTRATIONS WHO ACTUALLY ATTENDED THE CONFERENCE ONE OF THE MOST CRITICAL DECISIONS WE MADE THIS YEAR TO ADDRESS THE GROWING SIZE OF THE CONFERENCE WAS TO CHANGE VENUES MANY OF THE SURVEYS FROM LAST YEAR INDICATED THAT IT WOULD BE GREATLY PREFE RRED IF ALL ATTENDEES COULD BE HOUSED ON A SINGLE PROPERTY, RATHER THAN HAVING A SECOND OV ERFLOW PROPERTY BE UTILIZED BY THOSE LATE TO SIGN UP FOR THE CONFERENCE THIS MAKES SENSE, AS ONE OF THE MOST USEFUL VALUES THAT THE CONFERENCE PROVIDES IS THE OPPORTUNITY FOR PRAC TITIONERS TO NETWORK WITH ATTORNEYS FROM ACROSS THE STATE WITHOUT INTERRUPTION THOSE WHO WERE HOUSED AT AN OVERFLOW PROPERTY IN THE PAST DIDN'T HAVE AS GREAT AN OPPORTUNITY TO COM MUNICATE WITH THEIR PEERS DURING THE CONFERENCE DUE TO THE NEED TO BE SHUTTLED BACK AND FO RTH ACCORDINGLY, WE MADE THE MOVE TO A LARGER, NICER VENUE AT THE GRAND SUMMIT IN PARK CI TY, UTAH SURVEYS INDICATE THE CHANGE WAS VERY FAVORABLY RECEIVED BY OUR MEMBERS 93 4% OF THOSE SURVEYED APPROVED OF THE CHANGE IN VENUE (WITH 63% RATING THE VENUE "EXCELLENT- AND 30 4% RATING IT "GOOD") AND 89 1% OF THOSE SURVEYED INDICATING THEY APPROVED OF THE MOVE TO PARK CITY FROM MIDWAY FOR THE CONFERENCE LOCATION OF THOSE SURVEYED, 6 5% REPORTED THA T THIS WAS THE FIRST YEAR THEY HAD ATTENDED THE CONFERENCE, WHICH IS MUCH LESS THAN PREVIO US YEARS, WHICH TENDED TO HOVER BETWEEN 15-18% THIS IS ENCOURAGING, BECAUSE IT MEANS AS A N ORGANIZATION, THOSE WHO REALLY NEED THIS TRAINING ARE FINDING IT USEFUL, AND ATTEND THE CONFERENCE YEAR AFTER YEAR IT ALSO MEANS THAT THE CONTINUED HIGHER ATTENDANCE REPRESENTS ATTORNEYS WHO FIND THIS TRAINING USEFUL TO THEIR PRACTICE, AND ATTEND ROUTINELY, RATHER TH AN THOSE WHO HAPPEN TO STUMBLE ON OUR VERY AFFORDABLE CLE OPPORTUNITIES ALL OF THESE FACT ORS ENCOURAGE THE BOARD THAT THE FOCUS AND QUALITY OF THE CONFERENCE IS RESONATING WELL WI TH OUR MEMBERS OUR FEEDBACK FOR THIS YEAR'S CONFERENCE WAS OVERWHELMINGLY POSITIVE 95 6% OF THOSE SURVEYED RATED THE CONFERENCE AS EITHER "EXCELLENT- OR "GOOD," WHICH IS A 5 6% I NCREASE FROM LAST YEAR AGAIN, PARTICIPANTS FAVORED THE FRONT-LOADED FORMAT OF HAVING THE FIRST DAY BE LONGER AND THE SE</p>