

**Montgomery County Council  
of  
Parent Teacher Associations**

**LOCAL PTA PRESIDENT'S  
GUIDEBOOK**

**2009-2010**

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***MCCPTA OFFICE***

**Hours of Operation – 10 am – 2 pm Monday – Friday (School Year)  
10 am – 2 pm Tuesday and Thursday (Summer)**

**[www.mccpta.com](http://www.mccpta.com)**

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**Every member of a PTA Executive Board  
Should have either a copy of or access to the following:**

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- \* PTA Bylaws
- \* National PTA Annual Resources for PTAs
- \* National Standards for Parent / Family Involvement
- \* Maryland PTA Leaders' Guide
- \* Robert's Rules of Order, Newly Revised
- \* MCCPTA Blue Book
- \* MCCPTA Guidebooks
- \* A procedure book including the PTA's goals, plan of work, and reports from predecessor
- \* Website addresses :           MCCPTA - [www.mccpta.com](http://www.mccpta.com)  
  Maryland PTA - [www.mdpta.org](http://www.mdpta.org)  
  National PTA - [www.pta.org](http://www.pta.org)

**Please note that comprehensive information for PTA leaders is provided by National PTA in Annual Resources for PTAs and by Maryland PTA in its Leaders' Guide. If your predecessor did not pass them on to you ask your predecessor about them; updated versions are sent to each local PTA in the spring/summer. The websites also provide additional information on a variety of leadership topics.**

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## **Welcome to PTA**

The most challenging and gratifying volunteer position a person can choose is that of PTA President. Occasionally, it may be exasperating. However, it is not a job you will do by yourself; your fellow officers, board of directors members, members, principal, school staff, and, even MCCPTA will help you. Being PTA president is a unique experience, one that you will remember all your life.

MCCPTA will provide you with as much support and information as possible to make your job easier. Our organization provides leadership and training opportunities in the spring and in the fall for you and the members of your board of directors, as does the Maryland PTA in the summer. Additionally, your MCCPTA cluster coordinator and area vice presidents are able to help you find your way through MCPS and PTA.

You will be provided with the MCCPTA Blue Book (Directory), which lists the officers of MCCPTA as well as all the schools and MCPS offices. Don't hesitate to call on the area vice presidents, the cluster coordinators, committee chairmen, and any of the MCCPTA elected officers when you need help. Remember, these are experienced PTA leaders, and there is almost nothing that they haven't already heard! Blue books will be sent to each PTA in late October or early November.

We encourage you to build and maintain a good cooperative working relationship with the parents in your school community and with the principal and staff in your school. Please take the time to read the Guidebooks and the MCCPTA President's Letters you will receive each month. Join the MCCPTA Bulletin and/or Delegate Listserve in order to stay on top of current information and to discuss issues. We look forward to seeing you and your PTA's delegates at the MCCPTA delegate assemblies, held the fourth Tuesday of each month, usually at Carver Educational Services Center in Rockville (the Board of Education building).

The PTA president is the "presiding officer." You don't have to do "everything"; let others do their assigned tasks. You can delegate responsibilities as needed so that you can focus on priorities. You will be working with other volunteers whose time is just as valuable as yours. Building the team of PTA leaders and helping them focus on important issues, rather than trivia, is one of the most significant aspects of being a PTA president. Details do need proper attention, but keep them in perspective.

We appreciate your willingness to take the position of PTA president at your school and hope your involvement in PTA lasts a lifetime. Our best wishes for a successful Year!

## PTA Meeting Scheduling

Tuesday is PTA night in Montgomery County. Local PTAs should hold their monthly general membership meetings as follows to mesh with county and other local activities.

* Elementary	1st Tuesday
* Middle School	2nd Tuesday
* High School	3rd Tuesday
* MCCPTA Delegate Assembly	4th Tuesday

Specific calendar dates of MCCPTA meetings, BOE hearings, and Maryland PTA meetings will be published in the MCCPTA President's Letter, the MCCPTA website, and the on-line MCCPTA Bulletin, as well as the Maryland PTA Bulletin.

School holidays: Download the 2009-10 MCPS school calendar from the web site at <http://www.montgomeryschoolsmd.org/info/calendars/future/> or call MCCPTA office to avoid conflicting scheduling.

** NOTE:	MCCPTA	Montgomery County Council of PTAs
	Bluebook	MCCPTA Directory
	MCPS	Montgomery County Public Schools
	MCCPTA - EPI	MCCPTA -- Educational Programs Incorporated
	BOE	Board of Education
	CESSC	Carver Educational Services Center (MCPS Headquarters)
	CIP	Capital Improvement Program
	Officers	Elected officers: Pres. Vice Pres, Sec. and Treas.
	Board of Directors	Defined by your bylaws, usually officers, delegates, Principal, and committee chairs

Many acronyms are used in the school system. These alphabet designations may be confusing. Do not hesitate to ask what they mean.

- [MCCPTA Acronyms List](#)
- [MCPS Dept. of Communications Acronyms List](#)

[http://www.mccpta.com/acronyms\\_page.html](http://www.mccpta.com/acronyms_page.html)

NOTE: Be certain you are in compliance with your bylaws as to the number of general membership meetings you schedule each year. Duties and times of Board of Directors meetings should be published in your newsletter and parents should be invited to attend.

The following "Timeline for PTA Leaders" is intended to be a helpful reminder of the various PTA activities that you and other PTA leaders will want to keep in mind during the coming year.

**\*DUES ARE PAID MONTHLY TO MCCPTA AND MARYLAND/NATIONAL PTA**

**A MONTHLY DUES VOUCHER IS PROVIDED BY MCCPTA FOR MCCPTA DUES  
AN INVOICE MAILING FROM MDPTA/NATIONAL PTA ARRIVES MONTHLY FOR  
MDPTA/NATIONAL PTA DUES  
YOUR PTA TREASURER IS RESPONSIBLE FOR KEEPING PAYMENTS CURRENT**

<b>MCCPTA Suggested Timeline for PTA Leaders</b>			
<b>TASK</b>	<b>President</b>	<b>Treasurer</b>	<b>Other</b>
<b>Post-Election</b>			
Identify ways in which your PT(S)A can reach out to potential members	X		Membership, Human Relations
Review your bylaws and distribute copies for Board of Directors	X		Secretary
Begin to identify potential committees and committee chairs, establish procedure books for each office, committee	X		Board of Directors
Poll community to determine possible programs for the coming year			Program Chr.
Attend MCCPTA Presidents/Principals' Dinner (in late May)	X		Outgoing President, Delegates
Attend MCCPTA Spring Leadership Training	X	X	Bd of Dir., Com. Chrs
Find out who your cluster coordinators and AVP are	X		
Fill out Blue Book form and return to MCCPTA office	X	X	Board of Directors
Make copies of this time line to distribute to Board of Directors	X		Secretary
Arrange for audit upon transfer of books from one treasurer to another	X		Board of Directors
<b>Summer</b>			
Attend Maryland State PTA Conference on July 18, 2009	X	X	Board of Directors
Meet with new Board of Dir. and plan goals for the coming year	X	X	Board of Directors
Pay Insurance Premium to BB&T Insurance by October 1, 2009	X	X	
Approve plans of work for officers and committee chairmen			Board of Directors
Meet with principal - ask him/her to explain School Improvement Plan and identify parent involvement component of plan; talk about goals for the coming year; ask to include a welcome note from you to community in his/her back to school packet; establish a regular meeting time	X		
Participate in School Improvement Plan meetings	X or designee		
Plan publicity campaign for the coming year: back to school, PT(S)A meetings & programs, newsletters, membership drive, etc.			Membership, Human Relations, Publicity Newsletter
Plan calendar for the coming year	X		Program Chair
Sign up for room use with Inter-agency Coordinating Board (ICB): PTAs must request space by August 15 <sup>th</sup> to guarantee priority. Include all PTA meetings, programs, book fairs, special events, etc.	X	X	Secretary
Attend an ICB training session	X or designee		
Determine what PTA materials might need to be translated for the coming year			Membership, Human Relations
Review instructions carefully when PT(S)A membership cards arrive	X	X	Membership Chr.
After goals are set, budget committee should develop PTA budget; the budget should be approved by board of directors prior to general meeting where budget is adopted	X	X	Budget
Sign new signature cards for bank	X	X	One other officer
Check bylaws to determine if they are current	X		
If your school has a preview day, see if PT(S)A can be visible that day			Membership, Volunteer
Call your cluster coordinator to find out cluster meeting schedule	X		Cluster Rep
If your school plans a "Welcome Back" for staff, participate	X		Volunteer, Hospitality
Send "Welcome Back" notes to staff, encourage them to join & participate in PT(S)A	X		
Make arrangements for child care/transportation for board of directors meetings, general membership meetings, and programs	X		Volunteer
Check to see if liability insurance is paid		X	
Review criteria for MD PTA Achievement Award; see if you want to apply	X		Board of Directors
Get information from Maryland State PTA about Reflections program			Cultural Arts, Reflections

<b>MCCPTA Suggested Timeline for PTA Leaders</b>			
<b>TASK</b>	<b>President</b>	<b>Treasurer</b>	<b>Other</b>
<b>Summer (cont'd)</b>			
Plan Back to School Night - President's remarks? Approve budget? Volunteer sign-up sheets? Membership desk?	X	X	Bd of Dir., Cmte Chrs
<b>September-June -- Ongoing</b>			
Plan agenda, chair Bd of Dir. and gen. membership meetings Include reports from Delegates, cluster reps, treasurer, liaisons to other parent groups	X	X	Delegates, cluster reps, treasurer
Attend MCCPTA Delegates' Assembly	X		Delegates
Attend cluster coordinator's meeting	X or designee		Cluster rep
Report action taken at Delegates' Assembly			Delegate
Report on cluster meeting	X or designee		Cluster rep
Pay MS quarterly sales tax: October, January, April & July		X	
Pay State and National PTA dues to Maryland PTA monthly Pay MCCPTA Dues monthly to MCCPTA Office		X	
Write president's letter for newsletter	X		
<b>September</b>			
Pay State and National PTA dues to Maryland PTA monthly Pay MCCPTA Dues monthly to MCCPTA Office		X	
Attend Cultural Arts Showcase			Cultural Arts Chair
Attend MCCPTA Fall Leadership Training (or early Oct.)	X	X	Bd of Dir, Cmte Chrs
Recruit and plan orientation for volunteers	X	X	Volunteer
Distribute Reflections information to the school community			Reflections Chair
Possible Program Topics: present PT(S)A goal setting for the year; new initiatives at your school; ways to involve more parents			
<b>October</b>			
Pay State and National PTA dues to Maryland PTA monthly Pay MCCPTA Dues monthly to MCCPTA Office			
<b>Pay Insurance payment (See Maryland PTA Website for complete information-Under the Insurance weblink)</b>		X	
Make sure all Bd of Dir. members are paid-up PT(S)A member		X	Membership Chair
If Bylaws need to be revised, appoint committee	X		
Make initial membership report to Board of Directors		X	Membership Chair
Possible Program Topics: Child Health Day, October 5, 2009 National School Bus Safety Week, October 19-23, 2009 Walk to School Day—October 7, 2009			
<b>November</b>			
Pay State and National PTA dues to Maryland PTA monthly Pay MCCPTA Dues monthly to MCCPTA Office		X	
Attend Maryland State PTA Convention Nov. 13-14 2009	X	X	Board of Directors
Work with cluster coord, representatives to prepare CIP testimony	X		Cluster Rep
Possible Program Topics: School Improvement Plan; Test scores; Parent-Teacher Conferences- November 11, 12; American Education Week-November 15-21; National Take Our Parents to School Week			
File IRS form 990 4.5 months after close of previous fiscal year—this can be prepared as soon as your audit is complete.		X	

### MCCPTA Suggested Timeline for PTA Leaders

TASK	President	Treasurer	Other
<b>December</b>			
Pay State and National PTA dues to Maryland PTA monthly			
Pay MCCPTA Dues monthly to MCCPTA Office		X	
Collect Reflections entries and have them judged			Reflections Chair
No Delegate Assembly this month			
<b>January</b>			
Pay State and National PTA dues to Maryland PTA monthly			
Pay MCCPTA Dues monthly to MCCPTA Office		X	
Submit Reflections entries to MCCPTA by deadline			Reflections Chair
Attend MCCPTA forum on Superintendent's operating budget (early January)	X or designee		Delegates
Work with cluster coordinator, representatives to prepare operating budget testimony (IN EARLY JANUARY)	X		Cluster Rep
Check your PTA bylaws. When should the nominating committee be elected?	X		Board of Directors
Possible Meeting Topics: midyear review of PTA goals; completion of first semester; second semester changes			
<b>February</b>			
Pay State and National PTA dues to Maryland PTA monthly			
Pay MCCPTA Dues monthly to MCCPTA office		X	Membership
Elect nominating committee	X		Board of Directors
Participate in PTA Night in Annapolis	X or designee		Legislative Issues
Participate in selection of 2010-11 cluster coordinators	X		Cluster rep
Possible Meeting Topics: 1 <sup>st</sup> semester review; SIP plan; curriculum issues; National PTA Founders Day			
<b>March</b>			
Pay State and National PTA dues to Maryland PTA monthly			
Pay MCCPTA Dues monthly to MCCPTA Office		X	
Does your nominating committee report this month? What about the bylaws committee?	X		Board of Directors Committee Chairs
If your local plans to nominate someone for a National or State PTA Lifetime membership and/or a Partners for Education Award, the application needs to be completed shortly. Call the MCCPTA office for more information	X		Board of Directors
Membership numbers reported to Maryland PTA for awards consideration	X		Membership Chairs
Possible Program Topics: Midyear SIP review; spring testing			
<b>April</b>			
Pay State and National PTA dues to Maryland PTA monthly			
Pay MCCPTA dues monthly to MCCPTA office		X	
<b>April 15</b> Deadline for filing Maryland Personal Property Tax Return		X	
Reports from nominating, bylaws committees to membership; make sure that those reports are publicized with adequate notice	X		Secretary, Board of Directors
Send out committee evaluation sheets, due at end of year	X		Secretary
Remind Board of Directors to be prepared to turn over info/records to new board of directors			
Give input to cluster coordinators for budget testimony to County Council	X		Board of Directors
Let your principal know s/he will be the PTA's guest at the Presidents' & Principals' Dinner; send reservations in	X	X	
Possible Meeting Topics: CIP issues, outreach			

<b>MCCPTA Suggested Timeline for PTA Leaders</b>			
<b>TASK</b>	<b>President</b>	<b>Treasurer</b>	<b>Other</b>
<b>May</b>			
Pay State and national PTA dues to Maryland PTA monthly Pay MCCPTA dues monthly to MCCPTA Office		X	
Prepare for election (call cluster coordinator, AVP or MCCPTA office if you need help)	X		Nominating Committee
Conduct elections as specified in your bylaws	X		
Prepare transition to new leadership	X	X	Board of Directors
Possible Meeting Topics: May 4-8 Nat'l PTA Teacher Appreciation Week (NOTE: some schools designate this as "STAFF Appreciation Week"); analyze successes and difficulties of the year – make recommendations for next year			
Prepare CIP input and operating budget input – discuss at May PTA meeting to get input from your members	X		Cluster reps, delegates
<b>June</b>			
Pay State and National PTA dues to Maryland PTA monthly Pay MCCPTA dues monthly to MCCPTA office		X	
Install officers for the coming year	X		
Provide for transfer of information/records	X	X	Board of Directors
Thank everyone who has volunteered this past year	X		Committee chairs
ATTEND MCCPTA SPRING LEADERSHIP TRAINING	X	X	Board of Directors

### **The PTA Board of Directors**

The Board of Directors of the PTA is described in the PTA bylaws. Usually the Board of Directors includes the elected officers, MCCPTA delegates, committee chairmen, the principal, and student representatives if the group is a PTSA at a middle school or high school. Some PTAs will also include the immediate past president, a historian, a parliamentarian, and liaisons to other parent groups active in the school.

1. Each person on the Board of Directors has a special job to do. Review the positions in your PTA periodically to see if some should be re-defined or new ones added or, if necessary, deleted. Consult your "Blue Book" and Maryland PTA for names of committees currently working on the county and state levels. Use board of director positions to encourage more and more parents to be involved. Bring new people in who represent the demographics of your school community.

2. Each member of the board of directors has a responsibility to the entire organization. To fulfill that responsibility, all members should have:

- a. Knowledge of the local bylaws,
- b. Some understanding of what a PTA should be and should not be.
- c. An equal voice in policy-making with every other member.
- d. An opportunity to present a plan of work to the board of directors so that everyone understands the work that is being done and is committed to supporting it.
- e. A PTA procedure book to use and pass to successors.
- f. Materials provided by MCCPTA, Maryland PTA, National PTA that are specific to their positions.

3. Special ad hoc committees may be appointed to do short-term tasks and can involve more people who may not have time to serve on a standing committee. Reaching out to as many

people as possible is very desirable not only to bring in future leaders but also to diversify the "face" of the PTA.

4. Although the schedule for board of director meetings is established in the PTA calendar, reminder cards written by the secretary, emails, or phone calls are very helpful. These calls or cards can also be used to announce the major topics on the agenda of the next meeting and what each member's responsibility for reporting will be. It can be advantageous to provide written materials in advance of the meeting at which they will be considered.

5. Whether your regular monthly meetings are general membership meetings or board of director meetings largely depends on the quorum set by your bylaws. If your PTA has a large quorum (minimum number of members who must be present to hold a general membership meeting) then you may only hold 2-3 general meetings per year and hold board of directors meetings on your regular PTA night. If your quorum is relatively easy to meet, then all your regular monthly meetings may be general membership meetings and you might hold board of directors meetings at other points in the year to plan and organize activities. Make sure you consult your bylaws so that you know how many general meetings you are required to hold and when.

6. The Board of Directors should:

- a. Provide leadership to the organization, help members to focus the PTA's efforts on important topics.
- b. Approve appointments of committee chairmen (check your bylaws—there may be some exceptions to this), set goals, plan the PTA calendar, approve committee work plans, review and approve the PTA budget and bylaws amendments to be sent to the membership for adoption.
- c. Develop recommendations to take to the membership on all matters of policy, but make it abundantly clear that these are merely recommendations. The membership establishes policy.
- d. Get as much of the information which comes to the board of directors disseminated to the general membership in as many ways as your ingenuity can devise.
- e. Allow time for effective discussion and debate on substantive educational issues so that your consideration of these issues is not submerged by social and fund-raising matters. Your board of directors might hold separate meetings to discuss substantive issues in more depth. It is important to keep in mind that teachers and staff at your school are part of the community and should be encouraged to join and participate in PTA activities and discussions. Meetings should be scheduled so as to facilitate the attendance of as many people as possible. The schedules of parents who work should be respected.
- f. Involve the general membership so that the board of directors is seen as a service group rather than as "a little clique that runs the PTA".

7. Be nice to one another! Be aware of these things that can destroy your board of directors and be very damaging to your entire PTA!

- a. One member who monopolizes discussion or insists on his/her own way.
- b. Non-focused discussion which is usually the result of permitting general discussion on a topic without there being a specific motion on the floor.
- c. Habitually absent and non-functioning members who hinder others.
- d. Poor planning for meetings which drives everyone away.
- e. Issues which should be discussed, but aren't because they might be controversial. It is easier to duck all the issues except whether to serve punch or coffee, but did you agree to serve in a do-nothing organization or do-something organization?

- f. Lack of an agenda and specific beginning and ending times. A PTA meeting's business portion should be just such, not an excuse for a social gathering. People's time is a valuable commodity.
- g. The member who won't voice objections at the meeting, but does so all over the community afterwards.

### **Presidential Pointers**

1. Be enthusiastic. The PTA will, in great measure, reflect the attitudes of a strong president (and, unfortunately, of a weak one).
2. Know your bylaws and parliamentary procedure. PTA meetings should never be too stiff; but if you know, you won't be tripped up or embarrassed when called upon to cite chapter and verse (and some times you will be!). Parliamentary procedure allows the work of the organization to proceed in an orderly fashion and gives everyone an opportunity to participate in discussions
3. Give your MCCPTA delegates and cluster representatives ample opportunity to keep the membership informed and up-to-date on county, state, and cluster matters at each month's meeting.
4. Be certain that your committee chairs receive and read all material relevant to the work of their committee. Share the MCCPTA Bulletin and President's Letter and other Maryland and national PTA materials with the members of your executive board.
5. Give your vice presidents some concrete responsibilities, such as Program planning, committee supervision, etc. It can be very helpful to place some committees under the oversight of each vice president. This can free up the president to deal with "big picture" issues.
6. Keep your MCCPTA Cluster Coordinator and Area Vice Presidents informed about your PTA's successes, concerns and operations. Ask their help in answering questions or solving problems. Invite them to meetings occasionally.
7. Use parliamentary procedure in conducting meetings.
8. DELEGATE. One person can't do it all. Break the tasks into manageable pieces and ask people to help. This way the work will be done, you won't "burn out", and the next leaders will become more experienced. Always support the person doing the work that has been delegated and make sure the task is completed. Chairmen should participate in decisions and not merely carry out "orders."
9. See that your PTA is represented at PTA events, meetings, and workshops at the county and state levels.
10. Keep business meetings interesting, orderly and brief, but allow time for discussion. Be neither tortoise nor steamroller.
11. Refrain from expressing your personal bias or opinions when presiding.

12. The procedures for the School Improvement Plan call for parent/community involvement in the development and review of the plan, as does the Board of Education's Parent Involvement Policy. Encourage the principal and staff to involve parents in decision-making at your school.

13. Promote good relations with all school staff. Always consult the principal on any project concerning the school. Try to solve problems cooperatively when necessary.

14. Use the materials such as National PTA's Annual Resources for PTAs or websites to make your work easier. You do not have to "invent the wheel" when you use proven materials and techniques.

15. Be generous with praise and recognition of service of all members.

16. Avoid "project hopping." Focus on one or two objectives during the year and accomplish them. One or two projects completed are better than half a dozen half-finished ones.

17. Expect chairmen to keep adequate records of committee work. Encourage them to have these ready in the spring to turn over to new chairmen

18. ENJOY YOUR JOB!! Take PTA seriously but not yourself. Plan to have some PTA activity during the year that is strictly for fun.

19. Do you know that you have MCPS "pony" privileges? (The PONY is the MCPS interdepartmental mail system to all schools, Central Offices and County Government.) A pony mailbag is available in each school office. Bulky items and materials without time priority can be sent at no cost and often as quickly as regular mail.

20. Be sure that you, the PTA secretary or other designee checks the PTA mailbox in the school office on a regular basis and distributes mail to other officers and chairman. Do not hoard mail that others need to do their jobs!

21. Become familiar with Montgomery County Board of Education policies.

22. Promote continuous PTA involvement in your school. Be sure to plan good publicity for all PTA programs and activities through PTA newsletters, posters, local newspapers, flyers, principal's newsletter, school bulletin boards, etc.

23. Make sure your PTA operates within its established budget.

24. Plan three PTA events or activities for each fundraising event. Fundraising is not the primary purpose of PTA. (This three for one rule is a requirement of the IRS for non-profits.)

25. Pick an issue affecting children and education; develop and carry out an advocacy campaign at the county, state, or national level.

### **Guidelines for Developing Good Working Relationships with Principals**

Through the years, PTAs have played an important role in improving schools by fostering broad understanding of school programs; encouraging and supporting the establishment of new services; encouraging public support for program improvements; building positive relationships

among school staffs, students, and parents; and keeping the school informed about community needs, desires, and concerns.

PTAs have accomplished these results best when the organization has had strong leadership and has maintained its identity as a strong, independent group, yet maintaining close working relationships with the principal and staff. Both the school and its PTA exist to promote the welfare of each student. In working toward these jointly held goals, the following guidelines have been developed:

The principal is legally responsible for the school's program and, in this capacity, serves as the education leader and final decision-maker at each school.

In providing leadership and making decisions, however, principals recognize that PTAs are an integral part of their communities. Therefore, they normally establish processes for informing and soliciting the views of staff, students, and parents to aid in their leadership and decision-making roles.

The principal is a member of the PTA board of directors (like all Board of Directors members, the principal must be a member of the PTA to claim his/her seat on the Board.)

To establish and maintain a positive working relationship the principal and PTA must cooperate. The principal can be expected to

- Provide extensive, current information about county and local school policies and procedures;
- offer advice and information to parents and PTA leaders;
- support PTA programs and efforts as much as possible;
- encourage community support for the PT(S)A.

It is essential for the principal to be knowledgeable about PTA and community viewpoints. The principal should

- seek advice of parents of particular groups of students or grade levels on issues that have implications for them in particular;
- engage in full and frank discussions with the PTA, or affected parents and students, concerning the background of issues;
- involve the PTA board of directors and membership as participants in the study and discussion of issues and consideration of alternatives, prior to final decision-making on issues that have implications for students and their families.

The PTA and community must be kept informed about issues and decisions affecting the school or segments of the community. The principal:

- makes continuing efforts to interpret the curriculum, instructional methods, and organizational patterns in the school, showing how these meet student needs and demonstrating their relationship to the county program of studies;
- informs the PTA and other parents about the school's progress toward its goals by encouraging discussion of the school's annual report to its community;
- keeps the PTA and others informed about progress toward the resolution of educational concerns within the school community;
- recognizes the importance of involving parents in their children's education.

The principal should become familiar with the following to help understand PTA and to develop positive working relationships:

- general knowledge of National PTA, Maryland PTA and MCCPTA policies and the bylaws of the local PTA;
- MCCPTA, its publications, and workshop opportunities as well as the assistance available from cluster coordinators and others involved in MCCPTA.
- The right of the PTA to use the "PONY" and a school mailbox.

Principals are special guests of their PTAs at the Presidents and Principals Dinner in May. This event honors the principals for their support of the PTAs.

The principal may help build and strengthen an effective PTA by encouraging the leaders to seek training, to participate in MCCPTA, to follow appropriate PTA procedures, and to reach out to those who have not been involved in the school and the PTA previously.

### **PTA Record Keeping To Assist You in Maintaining a Well Run Organization**

PTA records are the business of all the leaders. Whether your PTA has a person designated as a historian depends upon whether there is a large organizational job to be done at the moment, or whether it is a job of checking annually to see that good records are kept current. Now is a good time to check that histories and records are in good shape.

Every successor in your PTA will bless you for giving him/her some feeling of continuity. Too often PTA closes up shop every spring and each new board of directors must re-invent the wheel -- must make all the mistakes their predecessors made.

Your MEMBERSHIP CHAIRPERSON would be in an excellent position to tell prospective members just what your unit has accomplished in the past year -- or in five or ten years past -- so that they will feel they are joining a "going concern."

**The Minutes and Official Documents** - The official records of any organization are the minutes of the meetings. Read the MCCPTA Guidebook for Secretaries and Robert's Rules of Order to see if your PTA's minutes are being kept correctly.

The treasurer's books should be up-to-date. The monthly Treasurer's Report should always be included in the minutes. The Treasurer's books should be audited according to your bylaws, usually once a year or at the change of treasurers. After the audit has been conducted, the annual report should be presented to the executive board and the membership. Maryland PTA bylaws provisions require each local PTA to provide a copy of the annual report following the audit to either the Maryland PTA "or their designee."

The PTA secretary should have a copy of the most recently approved bylaws at all times. Up-to-date bylaws are the first step toward your Maryland PTA Achievement award. If your bylaws are not current, your PTA is not considered as being in good-standing with the Maryland PTA which may put your status as a PTA and a tax-exempt organization in jeopardy.

#### **Local PTA Reference Records**

A large notebook containing a complete file of your PTA newsletters, and ...

A second notebook organized either by year or by subject matter containing:

1. A complete list of the executive committee (with year), with addresses and phone numbers so that you can contact someone from the previous year for information if the records don't contain something you need to know.
2. A copy of the current budget adopted by the membership -- plus notations of any additions and modifications made during the year as approved by the membership.

Notations as to whether the money was actually spent according to proper PTA policy and procedures would be helpful in making your PTA more effective. The audit committee report and the annual treasurer's report should also be included.

3. A listing of the programs for the meetings including the method of presentation (speaker, panel, small groups, film), the subject matter covered and comments on audience reaction and response.
4. An annual listing of the projects provided by committees and by the PTA as a whole, the outcome, and evaluation of the projects for future use.
5. Procedure Books (All members of the executive board should have a loose-leaf notebook in which they keep current material and which they take to executive board meetings. There should be a copy of the annual report of the previous chairperson or officer, a complete description of the job responsibilities, the approved work plan, the list of committee members, and reports on progress during the year. This material will be given to the person's successor.)
6. The Maryland PTA Achievement Award form so that materials can be compiled in order to apply for the award.
7. Materials from National PTA, Maryland PTA, and MCCPTA to be used by all leaders.

### **On Display**

1. **Your PTA Charter from Maryland PTA** - framed and hanging in the school.
2. **PTA Objects Chart** - on display at all meetings. This attractive chart measures 23 x 35 inches, is now available in English or Spanish.
3. **PTA awards certificates** for membership, PTA achievement, etc.
4. **Scrapbooks** - for recording a PTA's activities through local newspaper articles, printed programs from special events such as luncheons and snapshots.
5. **Permanent Displays** - A few schools have large display cases which may contain a history of the person for whom the school was named: list of the charter members of the PTA in illuminated script: pictures of past officers and principals - whatever might be attractive and unique to your PTA and your school.

### **Insurance Coverage**

*You should be aware of the following:*

1. *The Montgomery County Public Schools do not cover any PTA event. MCPS only assumes responsibility in two instances:*
  - a. *In an instance where an employee of MCPS has been negligent and an accident occurs as a result.*
  - b. *In an instance where there are structural deficiencies in the physical plant or a plant was not properly maintained and an accident occurs as a result.*
2. *If a child or adult suffers a loss -- physical, psychological or monetary, the person or persons who accepted responsibility for the circumstances wherein the loss was sustained may be charged with liability for the loss.*

**Insurance Please Read Carefully - Please be advised some of this information may change when we get updated information from MDPTA Check with Maryland PTA for Updated Information**

As of the Maryland (MD) PTA fall convention in November 2007, all PTAs are required to have general liability, bonding, and directors and officers liability insurance as negotiated by MD PTA Maryland PTA Bylaws, Article VII, Section 7:

*All local PTAs shall have, at a minimum, bonding, liability, and directors and officers insurance through the Maryland PTA negotiated policy, a due date no later than October 1, 2008 as the date the state will cover existing local policies.*

These provisions include the benefit of (1) consistency in that all PTAs are covered by the same policy with the same insurance company and (2) a group rate that reduces the cost to individual PTAs.

Recently, the MD PTA Board of Directors met and reviewed competitive bids from several insurance companies, including RV Nuccio and AIM. At that time, the Board selected BB&T Insurance Services, Inc. as the insurance broker for Maryland PTA. BB&T writes insurance for California and Connecticut PTAs. The agreement with BB&T includes training at workshops and communication with the locals by e-mail.

BB&T publishes an insurance summary and loss prevention guide. It refers to Red Light, Yellow Light and Green Light activities. Red Light activities are prohibited. Yellow Light refers to activities where certain conditions must be met and the local PTA must consult with the insurance broker in advance of engaging in any of those activities. Green Light activities are approved.

The BB&T annual premium is \$166 for each local PTA, a significant savings from the current Nuccio policy. Please include a late payment fee of \$25 if payment is made after October 10, 2008. \*PLEASE NOTE THAT THE ANNUAL PREMIUM MAY CHANGE FROM YEAR TO YEAR - CHECK WITH MDPTA EACH YEAR

**So, EACH LOCAL PTA MUST PAY ITS INSURANCE PREMIUM TO THE INSURANCE COMPANY AS SOON AS POSSIBLE.** Enclosed is the application to fill out and attach with payment to BB&T. An insurance summary and certificate of insurance will then be issued to each insured PTA.

Contact Teresa Willis, Office Administrator, at [officeadministrator@mdpta.org](mailto:officeadministrator@mdpta.org) or 410-760-6221 with questions regarding premium payments.

WWW.MDPTA.ORG

[Enrollment Form.](#)

[Loss Control Guide Book-2008 Maryland](#)

### **INSTRUCTIONS TO PURCHASE INSURANCE**

- Invoice for MARYLAND PTA INSURANCE PROGRAM ENROLLMENT FOR 10/1/08 TO 10/1/09
- Premium for the period 10/1/08 to 10/1/09 is \$166.
  1. Please send payment check and [completed invoice](#) to:  
BBandT Insurance Services of California, Inc.  
Attention: Kathy Meagher  
535 North Brand Blvd., 10th Floor  
Glendale, CA 91203
  2. For questions or enrollment information please contact Kathy Meagher, Joy Brassell or Jennifer Burgh. Toll Free: (866) 611-9400 or [mdpta@unionbancins.com](mailto:mdpta@unionbancins.com).  
Or FAX (714) 626-7672

### **The PTA and Elections**

The PTA is nonpartisan. No PTA and no person speaking in the name of the PTA or using their PTA titles may support any political party or any candidate in any election, including the non-partisan Board of Education campaign.

The PTA may inform its members of meetings where they can meet candidates and encourage them to be knowledgeable voters. Every candidate for a particular office should be included in any informational packet. The PTA should encourage responsible partisan activity for all PTA members acting as individuals; "get out the vote" campaigns are appropriate as long as no candidates are endorsed. A PTA may distribute nonpartisan voters' guides such as those prepared by the League of Women Voters. A PTA may provide forums for candidates to discuss issues if all candidates for that office are invited to appear.

The PTA may and should discuss issues. The PTA, upon the vote of its membership, can take a position on an issue or ballot question. The PTA, upon the vote of its membership, can join a short-term coalition formed to fight for or against a ballot question. The PTA should cooperate with other organizations to register voters and to get voters to the polls.

The PTA can form a political action committee to work to pass or defeat a ballot questions, but such a committee must file proper forms with the election board, have a chair and a treasurer, and carry an authority line on any literature including articles in the PTA newsletter.

The PTA cannot form a political action committee to support or defeat a candidate.

The PTA can use a school as a site for a candidate forum provided that school is not in session and that all candidates for that office have been invited.

The PTA cannot use children to take information home to parents about either candidates or issues.

## **Nonpartisan Policy and Legislative Activity**

All PTA bylaws, whether national, state, council or local, require the association to be nonpartisan.

These bylaw provisions address the prohibitions and limitations regarding political and legislative activity engaged in by entities that are tax exempt under Internal Revenue Code (IRC) Section 501(c)3. Failure to comply with these restrictions could result in a PTA losing its federal tax-exempt status.

Being nonpartisan and following the limitations does not preclude all legislative activity. One of the Objects of the PTA is "to secure adequate laws for the care and protection of children and youth." It is by educating its members--and through them, the general public--about the impact of issues affecting children and youth that PTAs can best influence the course of action of those who make policy decisions.

The National PTA and its constituent organizations may propose, support or oppose legislation provided that those efforts do not exceed the limitations placed upon such organizations under the federal tax laws.

The National PTA and its constituent organizations may never support or oppose political parties or candidates, including those running for school boards, even on nonpartisan slates, since IRS makes no distinction between partisan or nonpartisan elections for public office.

PTAs may conduct candidate forums alone or with other nonpartisan groups. In that event all candidates for each public office must be invited and asked to present their views. A nonpartisan moderator should be in charge of the meeting, and fair procedures must be established and agreed to in advance.

Neither the law nor National PTA Bylaws prohibits members as individuals from exercising their civic responsibilities in personal and partisan ways, even running for office themselves. However, PTA officers and those members who are likely to be recognized as being active PTA spokesmen or leaders, and who choose to enter the political or legislative arenas in their private (i.e., non PTA) capacities, are strongly urged to avoid even the appearance that those activities have, in any way, the endorsement, approval or support of the PTA.

PTA leaders who are considering seeking public office while they are serving as PTA spokesmen are urged to weigh the impact their candidacy, appointment or election could have on the nonpartisan image and tax status PTA enjoys.

In Montgomery County, when a PTA leader files to run for public office, whether partisan or nonpartisan, he/she usually resigns from their PTA position in order to avoid any appearance of conflict. Candidates for elected office may not serve as MCCPTA officers or speak on behalf of MCCPTA in public.

Members who choose to seek public office may not request or receive PTA endorsement at any time, but may list their PTA service as part of their qualifications.

Neither federal regulations nor National PTA policy prohibits state, council, or local PTA leaders from serving on commissions or other boards active in areas of concern to the PTA if such membership is not designed to support partisan interests.

**Appropriate Legislative Activities** - While the National PTA and its constituent organizations may never support or oppose a candidate for any public office, it may support or oppose legislation and policies affecting children and youth. Historically, much of the legislation protecting the health, education and well being of children and youth owes its existence to PTA support.

State, council, and local PTAs can and should have legislative committees that share information on legislation with the membership. Every PTA should be part of the united effort within the state and across the nation on behalf of children and youth.

### **Aims and Purposes of MCCPTA**

The local PTAs of Montgomery County are banded together in a Council for a three-fold purpose:

1. "To unify and strengthen local PTAs in the Council"
2. "To provide for the conference and cooperation of the local PTAs in the council so as to create a public opinion favorable to the interest of child welfare; to encourage child welfare projects in the local PTAs; and to assist in the formation new PTAs according to the plan of the Maryland PTA."
3. "To promote the interest of the National PTA and of the Maryland PTA within its territory."

MCCPTA adheres to the Objects and Mission of the National PTA and to its Basic Policies.

MCCPTA provides a link between locals, Maryland PTA, and National PTA. The president of MCCPTA serves on the Board of Directors of the Maryland PTA. MCCPTA collects names and addresses of PTA presidents to send to Maryland PTA and National PTA so they can receive the membership cards, materials, and publications; reminds PTAs of dues payments and bylaws reviews, and supports local PTA work in Montgomery County.

The Monthly Delegate Assembly provides an opportunity for delegates to present ideas, debate issues, to vote upon positions, to become better informed through the programs, and to make contact with other PTA leaders to share ideas.

The various workshops provide training for present and future leadership and a forum for discussion of current problems.

The officers of the council are elected to handle the work of the organization. The area vice presidents are elected to serve PTAs in specific cluster groupings. Cluster coordinators are elected to chair meetings of PTA representatives in each high school cluster and serve as resources for local PTAs.

The appointed committee chairmen work on substantive issues and support services for the council and the local PTAs.

MCCPTA cooperates with other organizations in the county that have interests in subjects of concern to PTAs.

The Council works closely with MCPS to provide interested and qualified representatives for task forces and study groups and to help disseminate information about changes in the school system and about School Board policy.

The following Guidebooks are available for local PTAs from the MCCPTA office and on the MCCPTA website:

- Guidebook for PTA Presidents
- Guidebook for MCCPTA Delegates
- Guidebook for Treasurers
- Guidebook for Secretaries
- Guidebook for Local Bylaws Review
- Human Relations Committee Model Guidebook
- Newsletter Editor Guidebook
- Guide to the Capital Improvement Program (CIP)
- Parents, PTA, & the School Improvement Program (SIP)
- MCCPTA Listservs Guide and Table

MCCPTA delegates are members of their local PTAs' board of directors and should report regularly on their activities at PTA meetings.

### **MCCPTA Procedures for Resolutions**

In order to assure a consistent, fair, and effective process for bringing resolutions to the MCCPTA delegates, the following procedures will be used.

The maker of a resolution (local PTA, individual delegate, or MCCPTA committee) will submit the resolution in writing (by email, fax, or regular mail) to the MCCPTA office. The resolution will be reviewed by the appropriate MCCPTA committee before the next board of directors meeting and, then, reported to the board of directors with a recommendation for further action. If the resolution needs further research or additional materials, the committee could request additional time to work with the maker of the resolution. If the resolution is already addressed by PTA positions and resolutions (from MCCPTA, Maryland PTA, or National PTA) or is contrary to the Objects and Mission of PTA, the committee could recommend that the resolution not be sent to the delegates. If the committee recommends that the resolution be brought to the delegates, the board of directors can refer it to the next delegate assembly for consideration. A resolution presented at a delegate assembly would not be voted on until the next delegate assembly so that the local PTAs could consider the issue and instruct the delegates.

Delegates may amend or refer any resolution back to the board of directors for further work. A delegate may propose a resolution from the floor at a delegate assembly, and that resolution will be referred to the board of directors for review.

If an issue is deemed time-sensitive or an emergency, the MCCPTA committee reviewing the resolution can request that the delegates receive the resolution immediately without taking it through the board of directors. The delegates would be able to consider and vote on the resolution at the delegate assembly that month as long as a five-day' notice had been given. The delegates would have to move to declare it an emergency resolution and it would take a two-thirds vote of the delegates to agree to consider it. Adoption of the emergency resolution would

be by a majority vote. If two-thirds of the delegates agree to consider the resolution, it may be addressed immediately.

### **The Role of PTAs in MCPS Employee Contract Issues**

Since the founding of the National PTA in 1897, the primary purpose has been to promote the welfare of children. No matter what the issue, PTAs must first ask whether any action or program is in the children's best interest. Adherence to that principle is especially important during employee contract negotiations. MCCPTA and National PTA suggest that you consider the following guidelines:

- Historically, PTAs have opposed job actions because they disrupt the children's education;
- PTAs are not a party to the contract negotiations, and those negotiations are not open to the public. National PTA recommends that PTAs not take a position on any contractual matter during negotiations between a union and the board of education. PTAs should remain neutral observers, safeguarding the children's best interest;
- The Board of Education's' fund-raising policy prohibits PTAs from paying teachers for their participation in school and extracurricular activities;
- Union representatives may ask to speak at a local PTA meeting. Under the terms of Maryland law and its contract with the union, the board is barred from discussing the negotiations. Keep in mind that PTA members will hear only one side of the issue;
- PTAs should closely follow the negotiation process, keep parents and the community informed, and continue to work for public support of education funding.

### **EVERY CHILD. ONE VOICE. The Value of Belonging to PTA**

PTA is an organization devoted to the improvement of the welfare of children and youth. PTA is the oldest and largest child advocacy organization in the country. PTA is the foremost proponent of parent involvement, and fostering effective parent involvement is the priority of PTA at every level.

There is no better value than a membership in the PTA! It costs each individual member only a few dollars a year.

- One dollar of your local dues goes to MCCPTA. This helps to provide training workshops, material resources (President's letter), outreach efforts, advocacy materials, parent involvement initiatives, and legislative outreach, office support;
- Maryland PTA receives \$1.50 in dues. This helps provide programs, services, materials, membership cards, and PTA leadership training at both summer conference and fall convention. Maryland PTA charters local PTAs as well as councils;
- National PTA dues are \$1.75. In return, the PTA you join is provided with publications, guidance, training, programs, and services. PTA has a voice on legislative issues and provides information on the progress of legislation and policy-making in Washington, D.C.

National PTA promotes a national agenda for all children and youth by:

- focusing attention on achieving national education goals;
- working to guarantee access to health information and care;

- promoting safety in the home, school, and community, and
- advancing parenting education and the well being of the family.

It is up to each local PTA to decide its own goals for the year. Each PTA is unique and must concern itself with its own community - but don't build a fence around yourself! You must also be aware of the strength your PTA has as a part of the largest volunteer organization in the United States. Your one voice united with other voices becomes a stronger, firmer voice -- speaking out for children and public education.