

Free State PTA 2025 -2026 Principal's Guide



Principal's Guide

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Principal's Guide

Welcome to the Free State PTA family. This Principal's Guide offers information on effective ways to work with principals. This guide is designed to provide strategies on how to work with principals at whatever stage in their profession while serving in a PTA leadership capacity, primarily as President.

This guide is a supplement to federal and state laws as well as to your approved constituent PT(S)A bylaws, policies and procedures, standing rules, or other governing documents. If there are This already pre-existing norms practiced at your school that works well you are encouraged to use them as well as any additional successful best practices already implemented when working with principals.

History of the PTA

The National Parent Teacher Association (National PTA) was founded in 1897 as the National Congress of Mothers by Alice McLellan Birney and Phoebe Apperson Hearst. On Feb. 17, 1897, over 2,000 people—mostly mothers, but also fathers, teachers, laborers and legislators—attended the first convocation of the National Congress of Mothers in Washington, D.C. Twenty years later, 37 chartered state congresses existed. In 1970, the National Congress of Parents and Teachers (National PTA) and the National Congress of Colored Parents and Teachers (NCCPT)—founded by Selena Sloan Butler in Atlanta, Ga.—merged to serve all children.

As the largest volunteer child advocacy organization in the nation, the PTA is a membership-based organization and serves as the conscience of the country for children and youth issues. Through advocacy, as well as family and community education, the National PTA has established programs and called for legislation that improves our children's lives, such as:

- | | |
|--|--|
|  Creation of Kindergarten classes |  Hot and healthy lunch programs |
|  Child labor laws |  Juvenile justice system |
|  Public health service |  Mandatory immunization |
|  Arts in Education |  School Safety |

To read more history of the National PTA please read [here](#) or [alternatively, view History - About PTA | National PTA](#). Membership in PTA shall be open, without discrimination, to anyone who believes in and supports the mission, purposes, and principles of National PTA and pays dues as required.

Mission of the PTA

The mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

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Because PTA is a membership-based organization joining a PTA at the local school or community level inherently provides membership to the state and national levels. There are several benefits to joining the PTA. National PTA dues are \$3.25 and state dues to Free State PTA are \$2.00.

Values of PTA

The values of the PTA underscore the ethics of PTA leaders and volunteers working together.

Collaboration - We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families."

Commitment - We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded."

Diversity - We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual, orientation, and work experience."

Respect - We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals."

Accountability - All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives."

Purpose of PTA

In terms of objectives, the PTA has the following six purposes.

- A. To promote the welfare of children and youth in home, school, community, and place of worship, and throughout the community;
- B. To raise the standards of home life;
- C. To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- D. To promote the collaboration and engagement of families and educators in the education of children and youth;
- E. To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and,
- F. To advocate for fiscal responsibility regarding public tax dollars in public education funding.

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Principles of PTA

The basic principles of PTA are:

- A. The association shall be noncommercial, nonsectarian, and nonpartisan.
- B. The association shall work to engage and empower children, families, and educators within schools and communities to provide quality education for all children and youth, and shall seek to participate in the decision-making process by influencing school policy and advocating for children's issues, recognizing that the legal responsibility to make decisions has been delegated by the people to boards of education, state education authorities, and local education authorities.
- C. The association shall work to promote the health and welfare of children and youth, and shall seek to promote collaboration among families, schools, and the community at large.
- D. Commitment to inclusiveness and equity, knowledge of PTA, and professional expertise shall be guiding principles for service in this association.

Basic Policies of PTA

The following are basic policies of PTA.

Despite other provisions in the Free State PTA and National PTA bylaws, the association may only engage in activities allowed for such associations as defined under the Internal Revenue Code:

1. PTAs are exempt from federal income tax under Section 501 (c)(3) of the Internal Revenue Code; and as a charitable organization,
2. Contributions to PT(S)As are tax deductible under Section 170 (c)(2) of the Internal Revenue Code.

Upon the dissolution of this association, after paying or adequately providing for the debts and obligations of the association, the remaining assets shall be distributed to Free State PTA whose purposes are in accordance with those of National PTA.

The association or members in their official capacities shall not, directly or indirectly, participate or intervene (in any way, including the publishing or distribution of statements) in any political campaign on behalf of, or in opposition to, any candidate for public office; or devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise.

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Nonprofits in Maryland

All PTAs under Free State PTA are governed by nonprofit federal and state law in addition to their bylaws, Robert's Rules of Order (latest edition), standing rules, and policies and procedures. More specifically, the Maryland Corporations and Associations is the core state reference regarding Maryland nonprofits. According to the Maryland Code, Corporations and Associations § 2-412 (read as section 2-412), every Maryland corporation is required to have the following officers:

1. A president
2. A secretary (*recording*); and
3. A treasurer

A Maryland Corporation may appoint additional officers as allowed by its bylaws. The secretary is a critical position on the PTA executive committee and one of only three positions that are required by law as a nonprofit organization in Maryland.

According to the Internal Revenue Service (IRS) a nonprofit is an organization organized and operated exclusively for religious, charitable, scientific, testing for public safety, literary, educational, or other specified purposes. PTAs/PTSAs are tax-exempt organizations which has two main benefits.

1. The nonprofit organization is not liable to pay any federal income tax.
2. Donors to the organization may deduct their charitable contributions from their own taxes.

Overall, PTAs are an independent 501(c)3 nonprofit advocacy association. The board of directors and committees decide how PTA programs like scholarships are managed. PTAs maintain their own governance documents and other written processes that are in place to grant funding for school projects, for example.

PTAs in Maryland

As the largest child advocacy association in the nation as well as in the state, PTA has existed in Maryland since 1915, and Free State PTA was chartered as the official state PTA congress serving as a branch of National PTA in Maryland since 2021. The PTA supports all students and advocates for public schools, including public charter schools.

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The term PTA is interchangeable with PTSA (Parent, Teacher, and Student Association). The latter is typically found within middle and high schools and often denotes that there may be a student board member as delineated in their bylaws.

Maryland has over 660 PTAs with a membership of over 65,000 members. According to National PTA, Free State PTA is a Tier 1 state PTA congress which puts the state level PTA on par with significantly geographically larger states such as New York, Texas, California and Florida, Pennsylvania, and Utah, etc.

There are seven council PTAs located in the following areas in Maryland. The counties of Anne Arundel, Baltimore, Harford, Howard, Frederick, Montgomery, and Baltimore City. Council PTAs serve as an extension of Free State PTA and help give the state PTA congress capacity to administer training, establish new local PTA units, conduct field service, and facilitate advocacy initiatives as well as programs at the county level. To establish a council PTA, there must be three existing local PTA units in good standing.

Additionally, Free State PTA has divided PTAs into regions listed below.

Western	Eastern Shore	Southern	Central
Garrett Co,	Cecil Co.^	Charles Co.	Anne Arundel Co.
Allegany Co.	Kent Co.^	Calvert Co.	Baltimore City
Washington Co.	Queen Anne's Co.^	St. Mary's Co.	Baltimore Co.
Frederick Co.	Caroline Co.+	Prince George's Co.	Harford Co.
Carroll Co.	Dorchester Co.+		Howard Co.
	Talbot Co.+		Montgomery Co.
	Somerset Co.~		
	Worcester Co.~		
	Wicomico Co~		

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- **As defined by the Maryland Office of Tourism**
- ^Subcategory - Upper Shore
- +Subcategory – Mid Shore
- ~Subcategory – Lower Shore
- **Bolded Jurisdictions** indicate existence of a Council PTA



Teamwork

Focus on the mission of the PTA to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

The Principal and the PTA

Teamwork has become the model of success in business and industry. It is the key to success in education as well. Teamwork begins at the local school with a partnership between the principal and parents. When parents and the principal work together, they lead the way to success for all children.

Essentials of Teamwork

- Understanding each group and each other's roles and responsibilities
- Communication that is honest & open.
- Establishing visions & goals and communicating them with each other and together working collaboratively & cooperatively for student achievement
- Respecting each other's opinion and allowing for input and discussion; not expecting automatic approval and accepting of other paths and options
- Active encouragement of parents and staff members involvement
- Being committed to building trust

Teamwork, cooperation, collaboration, and partnership are the building blocks of leadership in education. Understanding each person's role is important for effective involvement. Parent involvement becomes a reality when there is strong support from the administration of the school where effective partnerships are built with the parents, teachers, and administrators to

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strengthen their participation in the school community. They are all team players networking to make student achievement possible.

- Working with PTA to develop volunteer programs
- Developing a plan of work
- Setting school-wide goals
- Provide school news and updates at PTA meetings
- Participate in PTA events
- Be open to feedback from parents.



Bright Idea: Teamwork - Work with PTA to develop volunteer programs

For example, consider having an event in coordination with PTA to utilize experiences of PTA parents / guardians to assist other parents with issues such as assisting with scheduling of parent teacher conferences. This can be helpful to school staff and provide one on one assistance to parents.

The Principal

The Principal

The principal is the educational leader and spokesperson for his or her school and the school community. It is the principal's leadership that sets the tone of the school, the climate of learning, the level of professionalism and the morale of the staff, and the degree of concern for students. Though the structure of schools differs from community to community, the main duties of the principal include these:

1. Educational leadership
2. Seeing that the school follows the curriculum guidelines adopted by the local school board or site-based management team.
3. Providing a safe and productive learning environment.
4. Supervision of school personnel - including training and evaluation, hiring and firing, overseeing teachers and their professional growth.
5. Helping to determine teaching structure, and the types of teaching techniques in the school.
6. Accurate record keeping, supervision of school schedules, and maintenance of proper school discipline.
7. Overseeing the school building; its safety, maintenance, and security.
8. Record keeping and accountability for building budget expenditures.

The PTA

The PTA

More and more parents want to take an active role in their children's education. To support the education of all children, the PTA and the Principal must strengthen their ties. A working partnership between the Principal and the PTA, dedicated to the welfare of all children and

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youth, can strengthen family life and improve education for all children. Teamwork is the key to success in education. PTAs can do the following to work effectively with the principal:

1. Encourage the Principal to speak openly of school goals and concerns.
2. Present PTA concerns and issues to the principal. Develop a forum that allows for frank and open discussion.
3. Focus on education and how to benefit students.
4. Work with the Principal or site-based management council to set goals. Plan programs that will help achieve these goals.
5. Be alert to staff and community talents and resources and draw on them for the benefit of the entire school.
6. Work with the Principal to develop annual school reports and budgets. PTA volunteers can speak in support of budgets and other issues in front of the school board and local government.
7. Keep things seen or heard at school confidential. Honor ethical and legal considerations regarding the privacy of students, staff and their records.
8. Now more than ever, the partnership between the Principal and the PTA needs to be supported and strengthened in order to meet the needs of today's children and youth.

Remember to keep each other informed. Review plans for events. Work out problems and misunderstandings in a direct, honest way. Keep an open mind. Listen to each other. When working together in the community, be positive and enthusiastic. Portray positive teamwork. Develop a win-win attitude and celebrate each other's accomplishments.

Parents, PTA, and the Principal

The Parents, the PTA, and the Principal

Parents should foster a positive environment for children, so they are eager and ready to learn, self-disciplined and prepared to thrive in the school community. It is important to supervise homework assignments and take an active role in the education of their children.

As PTA leaders you can help parents learn about school programs, curriculum, regulations, and activities. You need to encourage parents to show commitment to education by attending PTA meetings, open houses, student concerts, and other school functions.

As the Principal, it is up to you to make parent involvement a school priority. All major studies have shown that parent involvement in education is one of the keys to quality education. The National PTA has adopted the National Standards for Family School Partnerships. These guidelines promote parental involvement by supporting parents, the PTA, and the Principal.

National PTA: Standards for Family School Partnerships

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National Standards for Family School Partnerships

Standard 1: Welcoming All Families into the School Community - Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.

Standard 2: Communicating Effectively - Families and school staff engage in regular, two-way, meaningful communication about student learning.

Standard 3: Supporting Student Success - Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school and have regular opportunities to strengthen their knowledge and skills to do so effectively.

Standard 4: Speaking Up for Every Child - Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.

Standard 5: Sharing Power - Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.

Standard 6: Collaborating with Community - Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



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NOTE: National PTA can revise these standards & updates are on the National PTA website:
<https://www.pta.org/home/run-your-pta/family-school-partnerships>

National PTA Policy and Position Statements Regarding Principals, Teachers, and School Community

As the largest advocacy association for children, National PTA provides a multitude of advocacy tools for their constituent units. Some of those tools include position statements that state, county, and local unit PTAs can use to advocate for children, their families, teachers, and school communities at large. Here are just a few listed but more may be accessed at the National PTA website on the advocacy tab of pta.org.

- ❖ [The Principal, the School's Educational Leader](#)
- ❖ [Development and Implementation of Teacher and Principal Evaluation Systems](#)
- ❖ [Teacher Negotiations, Sanctions and Strikes](#)
- ❖ [Teacher Preparation and Staff Development](#)
- ❖ [Family Engagement](#)
- ❖ [Supreme Court Decision on Prayer in Public Schools](#)

The Principal and the PTA Partnership

The Principal and the PTA as Partners

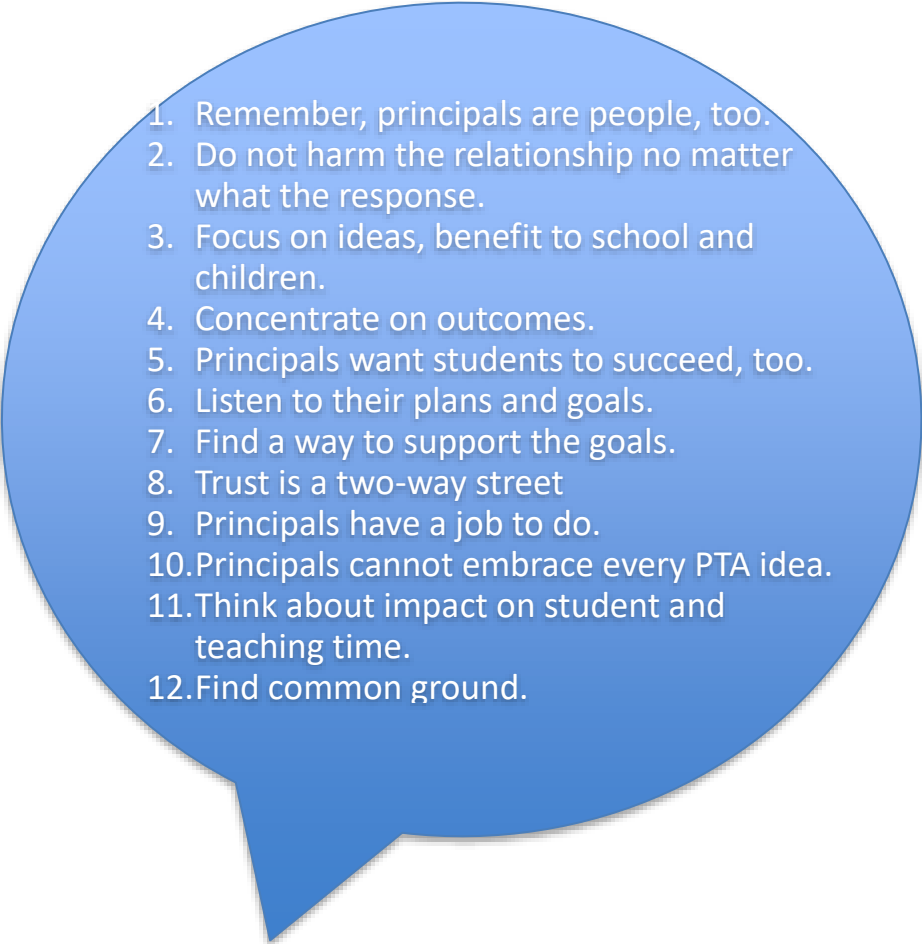
The Principal and the PTA should understand their respective responsibilities, but also each other's. They must set goals and work cooperatively to achieve them. They must respect each other's opinion, not expect automatic approval from each other, and not withdraw support if opinions differ. As partners, it means reaching out to all parents and school staff to help all children and youth reach their potential.

What Principals Say They Personally Value About PTA

1. Partnerships, collaboration and supportive relationships.
2. Communication and community connections.
3. Collaboration with the school and community to creating excellence for the school.
4. Advocacy for all children.
5. Ability to take action and get things done.

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Advice from Principals

- 
1. Remember, principals are people, too.
 2. Do not harm the relationship no matter what the response.
 3. Focus on ideas, benefit to school and children.
 4. Concentrate on outcomes.
 5. Principals want students to succeed, too.
 6. Listen to their plans and goals.
 7. Find a way to support the goals.
 8. Trust is a two-way street
 9. Principals have a job to do.
 10. Principals cannot embrace every PTA idea.
 11. Think about impact on student and teaching time.
 12. Find common ground.

Some Perspectives PTA Presidents Have When Working with or Need of Principals

- ✓ Willingness on the principal's part to be honest, transparent, and communicative
- ✓ Understanding PTA budget constraints, competing priorities, communication styles
- ✓ Realizing that principals cannot embrace every PTA idea, PTAs must consider impact on student and teacher time, and PTAs must be financially responsible.
- ✓ Improving academic outcomes for students and highlighting safety and security
- ✓ Exemplifying transparency and support of the PTSA
- ✓ Capturing their interest and building alliances.
- ✓ Getting responses, lack of authority to follow through
- ✓ Ensuring that the PTSA leadership and volunteers, the school administration and principal all have the same information and agree.
- ✓ Ensuring that school support requests are within the PTA mandate, ensuring that receipts are submitted for all reimbursements and that funds are not commingled.
- ✓ Recognition of PTA or PTSA efforts

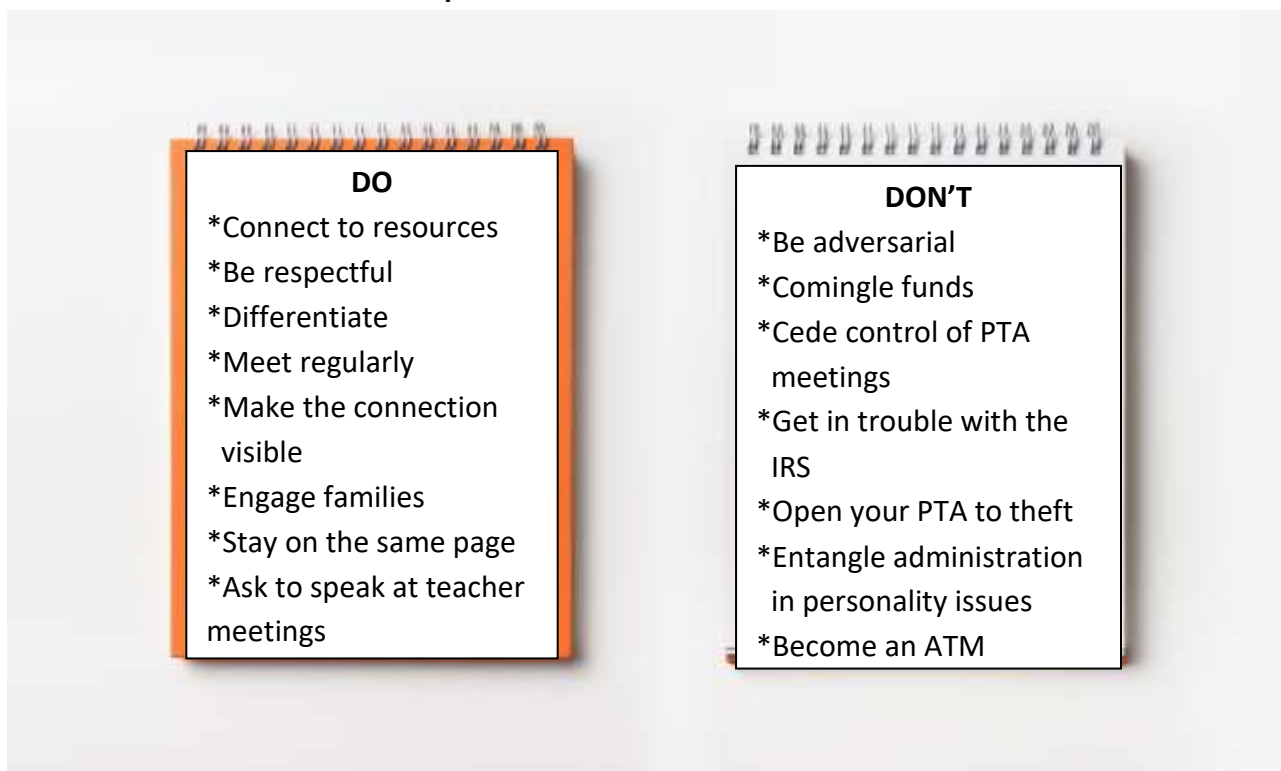
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Advice from PT(S)A Presidents



- *Be persistent, be bold, prioritize the impact on students and parents, not relationships with school leadership.
- *It's ok to say no. Family drama isn't a PTA problem. Advocacy is a key role of the PTA.
- *Plan early, be transparent, find one administrator/teacher who is supportive of the PTSA.
- *Put Relationship building first. Listen to the community and act on their feedback.
- *Be transparent and repetitive about PTAs efforts to support the community.
- *Get all passwords as soon as you are elected to the role.

The Dos and Don'ts of Partnerships



DO

- *Connect to resources
- *Be respectful
- *Differentiate
- *Meet regularly
- *Make the connection visible
- *Engage families
- *Stay on the same page
- *Ask to speak at teacher meetings

DON'T

- *Be adversarial
- *Comingle funds
- *Cede control of PTA meetings
- *Get in trouble with the IRS
- *Open your PTA to theft
- *Entangle administration in personality issues
- *Become an ATM

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PTA Rights and Responsibilities

PTA's Rights and Responsibilities

The National PTA Board of Directors has stated that all PTAs have certain organizational rights as follows:

- To function as an independent, nonpartisan, child advocacy group.
- To seek enactment of policies and practices that protect children and youth.
- To participate, within school board policy, in the setting of school goals and assist in the review of teaching material.
- To participate in making decisions affecting policies, rules, and regulations.
- To meet with appropriate school officials to discuss matters of mutual concern affecting children.

National PTA believes that all PTAs have the responsibility to do the following:

- To protect access to quality education for all children.
- To seek information on policies, curricula, and laws that affect children.
- To share accurate information with members and the school community.
- To know, help, and interact with teachers and administrators.
- To accept responsibilities willingly to assure that the PTA is strong and active.
- To work both within PTA and the school in a constructive manner, maintaining respect for democratic procedures and tolerance for the diversity of opinions.
- To work in partnership with school professionals to determine appropriate programs and services.

PTAs are not supporting organizations, clubs or booster groups for any school. They are separate legal entities which further the PTA mission of providing parents and families with a powerful voice to speak on behalf of children. PTAs work in harmony with school personnel, but they are not part of any school and are not subject to direction or control in any manner by school administration.

The Principal and the PTA Board of Directors

The Principal and the PTA Board of Directors

The bylaws of each PTA designate the principal as a member of the PTA Board of Directors. (The principal must be a member of the PTA.) The principal is a member of the PTA Board, usually as a voting board member but sometimes as a present non-voting board member who is invited to attend all board meetings and to provide points of view, consultation and feedback. As a member of the PTA Board of Directors, the Principal should provide a report on school issues and activities.

Where a principal is a voting member; the principal has one vote, as does each member of the board. The principal and other members of the board need to have a good working

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relationship; however, decision making authority regarding the PTA lies entirely with the PTA membership. Principals need to work with their PTA boards to set goals and work toward achieving them. The principal should:

- Be an active member and encourage teachers and staff to become members and participate in PTA functions and meetings.
- Help the PTA keep its primary focus on education.
- Keep in mind that fundraising is not the focus of the PTA, but rather a tool to help the PTA support its goals.
- Work together with the PTA to solve problems and set goals that will benefit all students and staff.
- Encourage the PTA board to plan events that provide for children's well-being, home-school cooperation, and community relationships.
- Keep parents informed on current issues in education.
- Encourage constructive discussion with parents to build confidence in the school's leadership and strengthen partnerships.
- Help recognize the efforts of volunteers.

Principal and the PTA President

The Principal and the PTA President

The parents and the children of a school benefit immensely when the relationship between the Principal and the President of the PTA is constructed on a solid foundation of trust, mutual respect, and open communication.

- Discuss concerns openly and honestly.
- Stay open-minded on issues important to the PTA.
- Support advocacy that PTA is fostering for the benefit of children or express your opinions to the President of the PTA and compromise on issues that may cause conflict between your respective offices.
- Let your staff know that the PTA is a working part of the school team and that the President of the PTA is working hand in hand with supporting and strengthening the education and welfare of the children.
- Invite the PTA to participate on school committees. Principals should have a goal of including at least one parent on each school committee.

Although schedules are very busy, it is suggested that the Principal and President meet monthly to evaluate goals, achievements and concerns. The principal should feel comfortable bringing problems and concerns to the PTA for resolution. Open communication strengthens the relationship.

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Regular attendance at PTA board and general membership meetings is another way to ensure open communication with the PTA and its members. It will also provide the principal with opportunities for input into the decisions being made by the PTA. The principal should be given an opportunity for input regarding the construction of the coming year's calendar. Without a doubt, collaboration is needed to administer successful programs.

The PTA President should consult with the principal to ensure that there are no scheduling conflicts that would inhibit regular instruction periods or conflict with school wide testing. Any correspondence sent to the membership by the PTA should be given to the principal as a courtesy.

It is a good practice for PTA President and Principal before end of the school year to discuss next year's calendar to allow both to provide input and to include PTA events as part of the school calendar.

The principal may only prevent correspondence from reaching the membership if it is harmful to the school or community. It is important that the principal be aware of information being disseminated to the general membership. In that way, the principal can direct any questions or concerns to the appropriate person. All PTA correspondence, flyers, newsletters, and information shall contain the name of the PTA somewhere, along with the appropriate contact person's name and contact information.

Principal and the PTA Budget

The Principal and the PTA Budget

The budget is a plan that expresses the goals and objectives of the PTA in terms of income and expense. An effective budget requires the PTA to determine both the ends, or the results being sought, and the specific means to be used to achieve those ends or results.

The Free State PTA recommends that the budget be developed during the planning period for new officers, usually in the summer, and be approved by the members at the first general meeting of the school year. A budget committee usually has the responsibility for developing the budget for the PTA. It is suggested that the committee consist of an odd number of members to preclude tie votes on any issue that may be debatable. The committee, oftentimes led by the PTA Treasurer, should include PTA members familiar with past activities, future plans, or have experience with developing budgets.

It is suggested that the principal have input into the process by means of suggestions, observations, and sharing the educational goals for the coming year so that goals and activities planned by the PTA complement rather than conflict with the educational direction. PTA should prioritize its purposes over fundraising. PTAs may raise funds to meet their budgets, but they should be certain that they are raising funds for appropriate PTA expenditures. It should be noted, nonetheless, that events and fundraisers are needed to build the budget and shouldn't exclusively on membership dues.

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- When planning the year's activities, PTA should use the 3-to-1 rule. For every fund-raising activity, there should be at least three non-fund-raising projects aimed at helping parents or children or advocating for school improvement.
- Fundraising activities should not take away from instructional time. One well planned, annual fund-raising project could raise whatever funds are needed to finance the year's activities.
- If the fund-raising event is to reflect the high principles of the association, it should have educational, social or recreational value.
- Ensure you are also spending time engaging your public officials to fund school supplies and services as you are spending time fundraising.

"The real working capital of the PTA lies not in the treasury, but in its members- in their energy, their resourcefulness, and their determination to advance the well-being of children and youth."

-National PTA Quick Reference Guide Money Matters

After the budget has been drafted, it should be presented by the budget committee chair to the PTA Board of Directors for consideration and then to the PTA membership for approval. This presentation is made during the association's first general membership meeting where a quorum is determined and present. A majority of the members are present, and voting is required for adoption.

The first general membership meeting of the PTA is usually in conjunction with the school's Back-to-School Night program. It is important for the Principal and the President to work together on the Back-to-School Night agenda to schedule adequate time for the PTA to be present during this event and some PTA's may also present the budget to the membership for approval during or as part of these events.

Because the PTA is a private association, PTA funds are private monies and must be kept separate from school funds. PTA funds should only be deposited into the PTA account. School, school Principal's, teachers', and school organizations' funds are public monies and should never be deposited into a PTA account. Only those expenses that have been pre-approved by the general membership or included in the budget as a line item are eligible for reimbursement. A check request, with receipts attached, should be prepared for each check to be written. These records will then be available to assist the financial review committee in the completion of its work at the end of the PTA fiscal year.

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Suggested Timeline of Working with Principals

This is a suggested timeline to be used as a guide. Your PTA may have similar but different timelines and events. What's most important is to plan together to advocate for the school community. In general,

- ✓ Develop Calendar at Board Retreat
- ✓ Meet with Principal to Revise Calendar
- ✓ Advocate for Improvements
- ✓ Apply for Grants and Programs
- ✓ Conduct Surveys

Month	Suggested Meeting/Collaboration with Principal & PTA President/PTA
July, August	President & Principal should have the original meeting of the fiscal year. Meet for planning of back-to-school event. Plan your back-to-school message & campaign and communicate it with the school and request for school to also communicate it as well as distribute it via PTA communication methods. Discussion about school & PTA goals, PTA calendar, Principal & PTA President meeting regular meeting dates. Collaborate regarding Teacher/staff appreciation back to school. Allow for input from the Principal regarding PTA budget.
September	Any of the above that have not yet been discussed or completed. Solicit the help of the Principal with getting Parents, Teachers & Staff to join the PTA such as by asking the school to include in back-to-school memo's , emails , newsletters as well as school announcements. Discuss with your school to enroll in National PTA School of Excellence.

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	https://www.pta.org/home/programs/National-PTA-School-of-Excellence
Monthly or Bimonthly	On a regular basis, usually monthly or Bimonthly; the PTA President and Principal could meet to discuss the upcoming events or goals. While it's a good idea to meet monthly, it is ok to skip some months. Especially since the Principal is already attending Board and General PTA meetings. Note that one or two months of the year can be very busy for Principals such as testing months, promotion months, senior graduation months. Also, at times it can be very busy for PTA Presidents due to major program events and fundraising events or committee work, or months where there are holidays. Communicate any upcoming events or programs and find ways to partner with the school for joint events, programs, awareness and celebrations. Find ways to partner with school in various events, programs, and activities.
November, December	Work with the Principal and School for mid-year events, programs, activities and appreciations.
January, February	Continue to implement programs, advocate for students, and recruit to PTA membership and governance.
March, April	Work with Principal and school for end of year promotions, graduation and appreciation events and activities.
May, June	Wrap of any end of year school activities.
	Before the school year ends, set up a meeting between the PTA President and the Principal to plan next year's calendar, activities and any budget related review or discussion.
	Succession Plan – Principal and PTA President – Both could reflect on the prior year and keep notes regarding items that the new Principal or new PTA President should know or would be helpful to know to help ease them in communicating in their new roles.
	Transition – During the transition year, PTA consider meeting with the new PTA President to provide examples of communication process with the principal and the school.

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We hope you find this material useful. Please know that if you have any questions or need additional information you may contact our office via e-mail at info@fspta.org.

Frequently Asked Questions and Answers (FAQ)

1) Can a principal dissolve a PTA?

No. Policies regarding the dissolution of a PTA or PTSA resides in the bylaws of that constituent unit. Should the membership of a PT(S)A constituent unit decide to dissolve, they must have a meeting with a notice to consider dissolving. In the event of the dissolution of any Free State PTA constituent association, this association, after paying or adequately providing for the debts and obligations of the association, shall distribute to Free State PTA its financial holdings, property, all records, and all remaining assets to service the state membership.

2) Can the principal serve on the Board of Directors of the PTA or PTSA?

Yes. In fact, it is highly encouraged. Membership to the Board of Directors is determined via the bylaws of the constituent unit.

3) How can presidents help principals increase PTA involvement/membership?

Presidents and principals can work together to administer a survey to parents and members about what is most important to them and based on that input, establish programming, advocacy campaigns, as well as family engaging events is likely increase membership. Constantly having a PTA table at family events that has a person or two there to talk about the PTA, distribution information, and encouraging membership is helpful. Building capacity for such opportunities includes recruiting members to lead such activities as membership, advocacy, or events chairperson.

4) What do you do when you don't have enough parent representatives or how do you encourage parents to become officers?

Recruitment begins with volunteers and makes them feel appreciated. When the school community wants to be involved in some capacity, let them be with specific parameters and reward them with praise and ask them to serve as a leader. You would be surprised that a simple ask will take a PTA a long way. It's wise to have job descriptions and duties of officers and chairs as well.

5) What happens if no one participates in the election of officers?

Article VI of a PTA unit's bylaws speak to officers and their elections. Typically, officers remain in their position until their successors assume their official duties. However, that isn't always possible. The position remains vacant until someone can serve in that capacity and those guidelines are delineated in the bylaws.

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6) What are the most helpful things a principal can do for a PTA or PTSA?

- a) Become a member, encourage membership among teachers, meet with executive committee.
- b) Be open to communication.
- c) Clearly communicate PTA plans to the community, provide clear dates for events (only reschedule when necessary and consult about rescheduled date), provide clear guidance on priorities for the year ahead.
- d) Attend PTA meetings, share announcements promptly, and emphasize PTA involvement in school events.
- e) Be honest, be transparent, be accountable, follow up on promises, maintain trust.

7) What role can a president serve to assist the principal?

Presidents can advocate for the principal and the school via assisting with family engagement activities, testifying before legislative bodies for increased resources for the school, serve as a liaison between families and the principal and informing them of concerns.

8) Do principals have to be a member of the PTA?

Not if they don't want to but presidents should encourage principals to join PTAs so they may serve on the board of directors or appoint a liaison, be comfortable speaking at PTA meetings to distribute information, provide to parents greater access to the principal at meetings, so that parents may be inspired to join, to show support for the PTA, and overall demonstrate the value PTA brings to the school.

9) Do principals run PTA meetings?

No, the president, or chair, runs the meetings while the principal runs the school.

10) How often should Presidents communicate with a new principal?

If a principal is new to PTA, be sure to communicate the value and benefits of having a PTA at school. Yet, the easiest way to understand the expectations on communication is to simply ask. During the summer or whenever a principal arrives, get onto his or her calendar early to meet and welcome him or her, introducing yourself, and developing a regular meeting schedule. Be sure to provide your contact information and that of your board and determine if he or she can attend meetings or send a liaison.

11) Can PTAs fund items requested by principals or teachers, such as playgrounds, furniture like chairs or microwaves, or teacher supplies?

It is natural and common to want to help the school in any way possible. However, policies and procedures should be in place to request funds from the PTA. Yet, it must be in the budget, as approved by membership via vote, and it should not be for capital equipment or supplies that the school system (district) ordinarily purchases. Remember, the PTA is an advocacy association whose purposes are found in the bylaws and do not include serving as a fundraising arm of the school. The PTA is inherently empowered to go before decision

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makers to advocate for increased school budgets as well as serve as a conduit to obtain resources, donations, or grants.

Contacts

National PTA

1250 N. Pitt Street Alexandria, Virginia 22314 Phone: 1-800-307-4PTA Fax: (703) 836-0942
E-mail: info@pta.org; Website: www.pta.org

Free State PTA

5730 Cottonworth Ave., Box 20924, Baltimore, MD 21209
E-mail: info@fspta.org; Website: www.fspta.org

Council PTAs

[Anne Arundel County Council of PTAs](#)

info@aaccpta.org

[PTA Council of Baltimore City](#)

presidentptacbc@gmail.com

[PTA Council of Baltimore County](#)

president@bcptacouncil.org

[PTA Council of Frederick County](#)

president@frederickpta.org

[Harford County Council of PTA](#)

president@hccpta.org

[The PTA Council of Howard County](#)

office@ptachc.org

[Montgomery County Council PTA](#)

office@mccpta.org

PTA Glossary

3-to-1 guideline: For every fundraising activity, there should be at least three non-fundraising programmatic or advocacy projects aimed at helping children, their families, teachers, or the school community at large.

Advocacy - The act of mobilizing individuals to work with other parents in their unit, community, district, state and national PTA to spark changes in programs and policies that benefit children.

Blue Ribbon School - The [National Blue Ribbon School Program](#) is a program run by the U.S. Department of Education to recognize great schools across the country. Each year, this program gives Blue Ribbon School awards to schools that are demonstrating academic excellence or great progress in closing achievement gaps. Schools of all types— public or private, huge or small—can be Blue Ribbon Schools.

Budget - The budget is a financial representation of the activities and operations a PTA expects to conduct during a specified time period. The budget estimates income and expenses for the

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fiscal year and must be presented to the association for approval and recorded in the association minutes. The budget should coincide with the association's fiscal year.

Bylaws – The governing rules of the association. Any change in bylaws requires a two-thirds vote of the association with thirty days' prior written notice to the membership. Bylaws should be reviewed every year and need to be submitted to Free State PTA for good standing every three years.

Council PTA – A division of and chartered by Free State PTA that services local PTA units in its immediate area. Normally, it is composed of three or more local units. The Free State PTA Board of Directors establishes procedures for the organization and chartering of council PTAs. Council PTAs may set their own dues and local PTA units have the option to join them. The purposes of council PTAs are in their bylaws.

Diversity, Equity, and Inclusion (DEI) – DEI is a practice well supported by National PTA and its constituent bodies. The definition of DEI may be found in the National PTA [resource guide](#). Additionally, there is a [local leader guide](#) for DEI. Also, the National PTA has a [multicultural guide](#).

Free State PTA – A state constituent of National PTA that abides by the National PTA bylaws and policies. The state level PTA to which all local PT(S)A and council PTA units report in Maryland has its own bylaws and policies.

Founders' Day - Each year in February (17th), PTA honors the three founders as well as past and present PTA leaders. Through special programs and events, PTA also attempts to increase the awareness of its members and the community by highlighting achievements, activities, projects, and goals. Founders' Day can be celebrated at the local unit, council, and state levels.

FY/SY – Acronyms for fiscal year and school year.

Good Standing – A term of art used to describe the minimum requirements necessary to be eligible for PTA privileges such as voting at conventions, participation in Free State PTA and National PTA Programs, scholarship awards, etc.

PTA or PTSA - Acronyms for Parent, Teacher, Association or Parent, Teacher, Student Association

PTA or PTSA Member - Any individual who subscribes to the Purposes and basic policies of the PTA becomes a member upon payment of dues to a PTA or PTSA unit. A person, by joining a local PTA, becomes a member of both the national and state PTAs.

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Quorum – The minimum number of members required for a PTA to conduct business. PTAs cannot vote on business matters unless a quorum is present. A quorum should be defined in the bylaws.

Reflections - The National PTA Reflections program is PTA's cornerstone arts program used to encourage students to explore their talents and express themselves. Students in grades Pre-K – 12 who participate in the Reflections program reflect on a specific theme and create original artwork in the following six categories: dance choreography, film production, literature, musical composition, photography and visual arts (including 3D Art).

Requisition - A written request or order for something such as a particular room for an event. Consultation with the principal is imperative to understand the requisition process.

National PTA School of Excellence Program – The National PTA School of Excellence program is an improvement and recognition program that supports and celebrates partnerships between PTAs, families and schools to enrich the educational experience and overall well-being for all students.

Standards of Affiliation (SOA) – Minimum standards required for PTA/PTSA leaders to ensure their independent nonprofit business remains current with all IRS, state, insurance, and PTA/PTSA requirements. SOA requirements may be found on the Free State PTA website at fspta.org.

Title I: [Title I](#) is a federal program that provides extra funding to schools with high percentages of low-income children. Schools can use Title I funds for curriculum, instructional activities, counseling, parental involvement, or an increase in staff. Parental involvement affects Title I funding. A school receiving Title I funding must implement programs and activities that promote parent involvement.

Voting Member - To be qualified to vote, a member must have paid annual dues to a local PTA or a council PTA.