

## Duties and responsibilities of the PTA Chair

- Prepares for meetings (with the Secretary)
- Invites committee members, parents, and staff to PTA committee meetings
- Suggests items for the agenda
- Identifies outstanding items from the last meeting
- Prepares introductions for any new committee members attending
- Sets the ground rules for meetings, and makes sure they are inclusive and efficient
- Delegates tasks to other committee members and volunteers, and checks they're completed
- Liaises with the school, and requests a 'wish list' for the PTA committee to use when deciding which projects to fund
- Ensures the committee fulfils its role in respect of the governance of the association as set out in its constitution – for example, holding an AGM, electing committee members, working with the Treasurer to ensure annual returns are completed if the PTA is registered as a charity
- Ensures any decisions made are clear, fit the objectives of the association, and are made by agreement of the committee as per your PTA's constitution
- The PTA Chair cannot make decisions alone: all decisions must be made by the whole PTA committee
- Writes the annual report for the association (with the Secretary)
- Writes the Chair's report for the AGM
- Can be a signatory on the PTA bank account (along with at least one other committee member)
- Makes sure the association is GDPR-compliant.

## Key skills

- Confident and assertive – able to control meetings and call them to order when necessary, making sure everyone has an opportunity to speak
- Able to remain impartial – ensures contributions are brief and that everyone's views are respected
- Calm, friendly and approachable – as the main point of contact for the PTA for all members, the PTA Chair must be inclusive, and make sure everyone feels welcome
- Organised and able to delegate – most PTAs organise a lot of activities. The PTA Chair should make sure the workload is shared and that tasks are completed as agreed

## Duties and responsibilities of the PTA Treasurer

- Keeps accurate, up-to-date financial records
- Presents financial updates at each committee meeting
- Manages the PTA bank account, and holds the association cheque book
- Arranges changes of signatories on the association bank account
- Manages different payment platforms
- Ensures all bank cards, cheque books, and paying-in books are accounted for and obtained from any individual leaving the PTA
- Ensures best practice procedures are followed for counting and banking money after events
- Makes approved payments
- Ensures procedures for making approved payments and claiming approved expenses are followed by all committee members
- Prepares the annual Treasurer's report for your AGM and arranges an independent examination of the association's accounts
- Completes the relevant Charity Commission's annual return if your PTA is registered as a charity
- Manages Gift Aid (or assists the committee member responsible for managing Gift Aid)
- Ensures committee members have read a copy of your association's insurance policy summary, which should detail cash cover, and that they adhere to any guidelines contained in the document

## Key skills

- Basic understanding of bookkeeping – able to maintain accurate records of income and expenditure
- Organised with an eye for detail – big events involve counting a lot of small change. The Treasurer leads the 'money' team, making up floats, and collecting money from various stalls
- Calm, approachable, and a team player – able to remain calm during busy times. Ensure they don't work in isolation by communicating regularly with the rest of the committee.

## Time management

It's important that the PTA Treasurer sets aside time to keep the accounts up to date on a regular basis. By updating the accounts on a regular basis, the PTA Treasurer will be able to:

- Pick up where they left off last time;
- Produce reports for your committee;
- Keep track of cash and bank balances.

Taking this approach should ultimately result in less time being required overall, although the time required of the PTA Treasurer will depend on a number of factors, such as:

- The number of transactions to be processed;
- The Treasurer's knowledge and understanding of accounting;
- What information the committee wants to have.

## **Main Role of the PTA Secretary**

The PTA Secretary supports the PTA committee to build effective communication links between the school and the association. They also maintain accurate records.

## **Duties and responsibilities of the PTA Secretary**

- Prepares for meetings (with the PTA Chair)
- Takes minutes at meetings, recording attendance, action points, decisions, and proposals
- Circulates approved minutes, along with a reminder of any actions agreed
- Maintains association records
- Makes sure the association is GDPR-compliant
- Updates trustee details with relevant charity commission (as appropriate)
- May be a signatory on the PTA bank account (along with at least one other committee member)
- Handles the association's correspondence

## **Key skills**

- Organised and efficient – keeps accurate records in a format that can easily be handed over to a successor
- Good listener – able to identify key discussion points, actions, and agreements at meetings to accurately record in minutes
- Calm, friendly, and approachable – able to communicate confidently with the school and the committee members

## Role of ordinary PTA committee member

The ordinary PTA committee members are equally legally responsible for the control of the association, its property, and its funds. If your PTA is a registered charity, they are also trustees of the charity and can be signatories on its bank account. Only trustees can be signatories on your charity's bank account.

Ordinary committee members have the same voting rights as officers in committee meetings, allowing them to make decisions on behalf of the association.

The roles of ordinary committee members offer a good introduction to your PTA's committee for those who wish to be fully involved in the association, but perhaps don't want to commit to an officer role.

Ordinary PTA committee members could be given extra tasks to help support the officer roles – for example, acting as a social media co-ordinator, and managing the association's Facebook page and other social media channels. They could perhaps help new parents become involved in school life, or recruit existing parents to volunteer at events, maybe as a class representative.

Sub-committees are often used to organise key events, such as the Summer Fair or Christmas Gift Sale. A sub-committee should be made up of at least one committee member, and a number of members (your regular volunteers). A committee member needs to be involved so they can report back to the rest of the committee on the activities of the sub-committee. Committee members retain overall responsibility for sub-committees, and make any final decisions.