

## Roles and Responsibilities of Officers, Board and Committees

Whether you are leading a PTA, serving an individual school, a district, or a community, the role of PTA president is a very rewarding one. Your unit will look to you for guidance in creating partnerships within your school community and fostering an environment where parent involvement is encouraged and respected. You will learn a great deal and put your talents and knowledge to use as a leader in your school community.

You will play a lead role in:

- Unit organization
- Meetings
- Inclusiveness
- Elections
- Programs
- Member training
- Finances

You will use your skills to:

- Organize: plan and set priorities.
- Recruit, manage, motivate and retain volunteers.
- Welcome a diverse and inclusive group of members, volunteers, and leaders.
- Run effective programs.
- Manage money, raise funds.
- Support membership growth and retention.
- Run effective meetings.
- Ensure all voices are heard through effective use of parliamentary procedure.
- Advocate on behalf of students.
- Transition to the next leadership team by nurturing potential leaders and preparing the incoming team.

As a new president, you should immediately introduce yourself and set a tone of cordial collaboration.

- Contact your state PTA. They are there to help. Provide the state PTA the names and contact information for you and your officers.
- Ask who you call if you have any questions.
- Ask if any training is scheduled in the near future that can help get you and your board off to a good start.
- Talk to with the outgoing president and officers. What worked last year? What did not? Thank them for their work.
- If yours is a school-based unit, introduce yourself to the school staff and principal. Ask about their plans for the year and tell them you are interested in helping them achieve their goals.
- If yours is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
- Review your “procedure book” –whether it is an electronic file, a cardboard box full of papers, or a binder thick with documents, get up to speed on what has happened in the past and what is expected of you.
- Read your unit’s bylaws. You and your board are responsible for following the bylaws, so you need to know what they say. If they are old and no longer relevant, one of your first moves may be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA.
- Find the most recent audit. You may need to talk to the treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done. You will want to start fresh with a new set of books, so be sure the previous set is closed out and audited.
- If your unit is a 501(c)(3) nonprofit (and most are), find the most recent Form 990 filing. Again, your treasurer may be able to help. All nonprofits must file some type of Form 990 with the IRS each year. Be sure you know when a 990 was last filed and what you will be responsible for filing in the coming months. 990s are due on the 15th day of the fifth month following the end of a fiscal year.
- If it has not yet been done, change the signatures on your PTA’s bank accounts. You will want to be sure previous officers no longer have access to your PTA’s accounts.
- Ask your state office if you are required to have insurance and when the payment is due. It is important to protect yourself and your board members by having insurance.

You are about to enter one of the most rewarding yet challenging times of your life. Remember to ask questions and use the support

available from your state PTA and from National PTA. We are in this together. And together we can make a difference for children and families.

### General Board Information:

While presidents have specific powers delegated to them through bylaws and policies, your chief role is to help guide your board. The board of directors is the core team responsible for meeting your PTA's goals and fulfilling PTA's mission. A well-running, informed board makes a president's job a lot easier.

Most boards have at least four officers: a president, a vice president, a treasurer and a secretary. Your board may also contain chairs of standing committees, such as a membership chair, Reflections Chair, Legislation Chair, etc. Check your unit's bylaws to find out what structure you should have in place. Together the entire board works as a team to reach your PTA's goals.

**TIP:** For a smooth running board, be sure to share this board section with your PTA's board members.

### Tips for a well-functioning board:

- Hold an orientation. Make sure all board members know their legal and ethical responsibilities and that each member has a job description. Remind them to review the Quick Reference Guides also.
- If you are a school-based unit, consider having a staff or teacher liaison position on your board.
- Plan for rotation and transition. Boards grow stronger when they consistently recruit new members and leaders. Make sure there are clear begin and end dates for all board positions. Start planning early in each term for a smooth transition at the end of the term—and that means saving reports, files, and notes.
- Utilize your nominating committee to elect your officers each term. Information about your nominating committee can be found in your bylaws and/or standing rules.
- Set goals. The board should have overall goals for the year that are in line with PTA's mission. Each committee should also have a goal that fits into an overall PTA strategy.
- Evaluate the work of the board. Are you meeting the needs of your community? Consider doing a survey of your members, the community, administrators and teachers and asking for input.
- Boards should self-evaluate regularly. Are board members committed? Does your board have the information and experience it needs to get work done? A [sample board assessment](#) is included in this guide.
- Does your board communicate? The board governs as a team. If information isn't flowing among PTA leaders, the board is not effective. Good presidents help facilitate communication.

### Basic Board Responsibilities:

The fundamental role of the board is to govern. PTA is a member-driven association. Members delegate power through bylaws. Much of the day-to-day work of a PTA is done by its boards. Boards are entrusted with the PTA's work by the members.

Although some responsibility can be delegated to officers or committees, ultimately it is the board of directors that is responsible for the PTA. As stewards, the board has specific legal responsibilities. Those responsibilities fall on the board as a whole—as a team-- although every individual board member is still responsible for ensuring the board fulfills its duties. Board duties include:

The Duty of Care requires board members to be reasonably informed about what the PTA does, to participate in decision-making, and to act in good faith. Board members are expected to use good business judgment when making decisions and protecting PTA's assets. Your PTA's primary asset is its name and reputation.

#### Board members should:

- Read minutes and background materials to support their decisions.
- Attend meetings, ask questions, and participate in discussions.

The Duty of Loyalty requires board members to act in the best interest of the association. Board members should not make decisions based on whether or not they or their family will benefit but, instead, on what is best for the PTA. They should not share confidential information. All PTAs should have a Conflict of Interest Policy, and a sample of that policy follows.

#### Board members should:

- Disclose if they or their families stand to gain financially by a decision.
- Abstain from voting and from sharing "insider information" if they have a close personal interest in the results of the decision.

The Duty of Obedience requires board members to comply with all local, state, and federal laws. If your PTA is a 501(c)(3) nonprofit,

your board must follow IRS regulations and file proper annual IRS reports. Board members' actions must also comply with PTA's mission and purpose, and board members must obey their PTA's bylaws.

Board members should:

- Ask how new projects and expenditures will fulfill PTA's mission. Ask if the project or expenditure is appropriate for a nonprofit.
- Have a copy of and refer to your unit's bylaws and, when appropriate, your board should move to revise the bylaws.
- Know the current state and national bylaw content.

## Basic Responsibilities of the Officers

### Vice President

The vice president may be called upon at any time to temporarily assume the place of the president; therefore, he or she should study the president's duties and responsibilities and be familiar with the work of the PTA. In the event of the president's resignation, the vice president assumes all duties until the president's position is filled in accordance with the bylaws.

The vice president is responsible for:

- Performing specific duties as provided for in the bylaws;
- Assuming responsibility for duties designated by the president; and
- Representing the president in his or her absence or upon request.

### Secretary

The secretary is responsible for keeping an accurate record of the proceedings of association meetings. These records are the permanent history of the PTA. Promptness, accuracy, and knowledge of PTA policies are key to this job. The secretary should be committed to helping the president conduct a businesslike meeting.

The secretary is responsible for:

- Recording minutes of PTA meetings, with special attention given to motions (recorded exactly as stated) and action taken;
- Keeping secure official, permanent PTA records, including all originals of approved minutes; and
- Maintaining a copy of current bylaws and standing rules, as well as the membership list.

The secretary should have these items on hand at all meetings:

- Minutes of the previous meeting
- Copies of the previous treasurer's report
- List of unfinished business to be discussed
- Agenda
- Current bylaws and standing rules
- Current membership list
- List of committee chairs
- Materials for note/minute taking

The secretary also may be given the responsibility of maintaining all PTA correspondence, including incoming and outgoing communications with members and notifications for all meetings. It is common for a local unit to designate these responsibilities to a corresponding secretary.

### Treasurer

The incoming treasurer should discuss with the former treasurer the status of current fundraising activities, what money is available to be spent versus what is owed, and the bylaws as they relate to the treasurer's responsibilities.

The treasurer is responsible for:

- Ensuring that the PTA's financial records are reviewed according to the bylaws before assuming duties;
- Having three authorized signatures on file at the bank for financial transactions;
- Signatures include those of the president, treasurer, and one other officer as an alternate (no two check signers should be from the same household);
- Obtaining two authorized signatures on every check;
- Collecting all money from persons delegated to collect or to raise funds during a local unit activity, and providing a written

receipt for those funds;

- Depositing all money in the name of the local unit in a bank account approved by the board;
- Maintaining an accurate record of all receipts and disbursements;
- Obtaining authorization from the board before writing a check or spending money;
- Remitting, by check, all authorized bills and statements as prescribed in the bylaws;
- Submitting a written financial statement at each board meeting and at each general membership meeting;
- Chairing the Budget Committee and preparing the annual budget as prescribed in bylaws;
- Reporting income and expenses as compared with the budget;
- Preparing an annual report to be used to review PTA financial records; and
- If your unit is a 501(c)(3), ensure the filing of the PTA's 990 report to the IRS.

The [PTA Finance Quick Reference Guide](#) will help orient the treasurer to his or her main areas of responsibility.

Committees: how they work and their relationship to the board and president

Presidents should never do it all. Committees are a way to share the work. Sometimes bylaws define committee structure, but your board may want to establish additional committees. Committees plan and promote the activities of the local unit. Committees are designated in two ways:

1. Standing committees are permanent. These committees conduct business year-round.
2. Special committees conduct specific business on an ad hoc (as-needed) basis. These committees dissolve when the business they were charged to do is complete.

A committee begins with a plan of work for the year that includes goals, action steps, timelines, and an evaluation for each activity. A [plan of work form](#) can be found in this guide.

A committee consists of three or more persons who have been appointed or elected on the basis of their qualifications. A definite purpose is established for each committee, and committee actions are subject to the control and direction of the association. Your local unit bylaws should provide guidance in how to form a committee.

Since all committees have power to do only that which they are instructed to do, they should receive such instruction from the group by which they have been created (which is often the board of directors).

## Committee Chairs

Committee chairs are responsible for the actions and activities of the PTA, including planning, communication, and receiving board or membership approval. Local unit bylaws will explain how to create committees.

General committee chair responsibilities include:

- Providing notice of all meetings to all committee members, including the PTA president;
- Working closely with other committee chairs (possibly combining efforts) so duplication will be avoided and programs and projects will be strengthened by new ideas and manpower;
- Preparing committee reports for board meetings; and
- Seeking member and board approval before taking any action (including distribution of public notices).