

## **Roles and Responsibilities of the PTA**

A number of Committee members in key roles will be standing down at the AGM, so we have summarised the key responsibilities for all named roles as a guide for parents (or grandparents) who may be interested in these. If this all sounds a bit formal, please don't be put off, it is very much a team effort and this guide is meant to be an information tool, especially for those new to the school or committee. If there is anything you would like to know, please ask any of the current committee members.

### **Chair**

The Chair should work closely with Mrs Searle, the Co / and or Vice Chair, Treasurer and Secretary to ensure that the PTA is run effectively. The main role of the Chair(s) is to lead half termly meetings and oversee the running of the annual fundraising events.

#### **Key responsibilities:**

- Provide leadership.
- Set the Agenda for Meetings and run the meeting (at school every half term).
- Welcome and involve new Members.
- Write regular newsletters in cooperation with the Secretary.
- Sign cheques for the PTA with one other Committee Member.
- Meet with Mrs Searle and Mrs Ellis and the Treasurer to agree PTA financial commitments for the year

### **Vice Chair**

The Vice Chair supports the Chair in providing leadership for the Committee, helps set the Agenda for the meetings and helps manage meetings in line with the Agenda. The Vice Chair deputises for the Chair when necessary and assists in the organisation and operation of the PTA.

#### **Key responsibilities:**

- Support the Chair in providing leadership.
- Chair any meetings that the Chair is unable to attend.
- Liaise with the Committee and Sub-Committees organising events.
- Prepare Meeting Agendas in consultation with the Chair.
- Welcome and involve other parents into the PTA.
- Prepare, with the Chair, the Annual Report for the AGM.

### **Secretary**

Secretary is a key Committee Member as they are responsible for ensuring effective communication links between Committee Members and between the PTA and the School.

The Secretary deals with all the correspondence that the PTA receives and helps the Chair ensure that Committee Meetings run smoothly. Building up a good relationship with the School, the Secretary will help make sure that correspondence, sent to the School, is passed onto the PTA promptly. The Secretary can arrange to leave PTA notices with the School office for distribution with School mailings / text to parents.

The Secretary will make arrangements for the Annual General Meeting (AGM) and help the Chair prepare the Annual Report. The Secretary may also be involved in co-signing cheques on behalf of the PTA.

#### **Key responsibilities:**

- Deal with correspondence.
- Send email to committee to confirm date of next meeting
- Prepare Agendas along with the Chair.
- Write up the Minutes of Meetings.
- Distribute Minutes to all the Committee.
- Co-sign cheques as required.
- Write the Annual Report with the Chair.
- Prepare and distribute newsletters and other communications to parents.
- Prepare flyers, posters, tickets, *etc.* for events and distribute to class reps as necessary.

### **Treasurer**

The role of the treasurer is to manage and control the funds the PTA raises.

The Treasurer should record all income and expenditure, details of the amounts received and spent, and have the information available for every Committee Meeting plus:

- the balance of funds
- committed expenditure

- income, expenditure and profit from each event held

The Treasurer should report on the current financial position at each Committee Meeting and this should be recorded in the Minutes. The report should include an update on funds received and spent since the last report. If the Treasurer is unable to attend a Committee Meeting, a written report should be sent to the Chair, at least one or two days before the Meeting. All financial decisions taken should be recorded in the Minutes of the Meeting. The Treasurer also:

- Liaises with the bank.
- Pays money into the bank account and reconciles bank statements.
- Advises the bank of agreed changes to the bank mandate, *i.e.* those authorised to sign cheques.
- Raises and signs cheques with a second Committee Member co-signing. The person co-signing must see what is being paid for before signing. The Treasurer should sign last and keep all original invoices.
- Withdraws money to provide a cash float for events.
- Monitors funds held on account and discusses with the bank or building society, the use of higher rate investment accounts. Any decision to use an investment account, including the amount to be put in the account, should be taken by the whole Committee.
- Ensure regular payments, for example, NCPTA membership, are made on time to guarantee benefits and take advantage of any discounts.
- Arrange appropriate licenses for events.

#### **Key responsibilities:**

- Maintain the financial records.
- Prepare and co-sign cheques as required.
- Report income and expenditure at meetings.
- Count and bank monies.
- Liaise with the bank.
- Charity registration and Gift Aid.
- Regular and other payments.
- Draw up the annual accounts.

#### **Committee Members**

Ordinary Committee Members work alongside the Officers, contributing ideas, helping to organise events or running smaller projects. They also have an important role to play alongside the Officers of the PTA in ensuring good communication with the rest of the School, encouraging participation and enthusiasm for the events organised by the PTA.

#### **Parents & Carers – Ordinary Members of the PTA**

Parents and Carers of children at the School are automatically Ordinary Members of the PTA. The PTA Committee informs them of the events and projects that are due to take place. The Ordinary Members participate in, and benefit from, the events run by the Committee. They may attend PTA Meetings, but they cannot vote on decisions made by the Committee. All parents and carers are encouraged to help out at the fundraising events. Information on help needed is usually provided by Class reps or via email in the run up to events.

#### **Class Reps**

Class Reps ensure good communication with the parents and teachers of their class. They organise social events for the parents and carers of their class. They may run small projects for the school, organise stalls and helpers for Summer and Christmas Fairs and help out where they can with PTA events. They also liaise with the Class teacher to organise the Cake Sale for their Year group.

#### **Key responsibilities include:**

- Maintain a class list, email distribution group and text message group where possible (this should be renewed each year in line the Data Protection Act rather than carried forward).
- Provide feedback and ideas from class to the PTA Committee.
- Welcome new parents to the School.
- Liaise with class teacher for any specific help required from PTA.
- Arrange social events for their class.
- Organise the Year Group Cake Sale.
- Help out at and recruit volunteers for PTA events.

#### **Named Roles 2013/14 to date:**

Co Chairs – Marie Sherman & Lisa Naji  
 Secretary – Catherine Norman  
 Treasurer – Dyl Meyrick

Vice Chair – Natasha Duffy  
 Vice Secretary – Carol Williams  
 Vice Treasurer – Sarah Ward