

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 Treasurer

The PTA Treasurer ensures accurate financial records are kept, and that best practice procedures are followed for counting money, banking, and making payments. They should keep your committee updated with regular reports and ensure end-of-year reports are completed for the association's AGM and, if your PTA is registered as a charity, the relevant Charity Commission's annual return.

If you have co-Treasurers, both individuals are equally responsible for carrying out the role. If you have a Vice-Treasurer, they will deputise for the PTA Treasurer, and carry out the role if the Treasurer is absent or steps down from their position.

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 such as BOPP
- 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.

PTA Treasurer - Top tips

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

The PTA Treasurer should implement, follow, and promote good financial governance practices for your PTA's committee and for their own role.

Duties and responsibilities of the Secretary

It's best practice to have the role of PTA Secretary filled. If you're finding it hard to fill the position, you could consider splitting the duties between two committee members.

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