

# PTA BOARD RESPONSIBILITIES

---

## President

### Characteristics:

- Desire to serve the PTA, the school, and ultimately the students
- Understanding of the organization's mission
- Willingness to delegate tasks
- Good listening skills
- Effective communication skills

### Responsibilities:

- Preside at general PTA meetings and executive board meetings
- Serve as the primary contact to the principal and represent the PTA at meetings of other groups, if needed
- Serve as an ex-officio member of all committees
- Retain all official records of the PTA

### Typical Monthly Tasks:

- Prepare for and lead executive board meetings
- Prepare for and lead PTA meetings
- Review the treasurer's report
- Have regular check-in meetings with the principal
- Thank volunteers for their efforts

### Typical Annual Tasks:

- Finalize the activities calendar with the principal
- Set the schedule of monthly executive board meetings for the year
- Hold a committee chair orientation
- Update the signature cards at your PTA's bank
- Double-check key organizational dates, including your PTA insurance policy renewal, incorporation with the state, and IRS Form 990 or 990-EZ, if applicable
- Determine which officer and committee chair positions might need to be filled next year, and reach out for volunteers

### Training and Resources:

- One-on-one with outgoing president
- Articles about president topics
- Past files and examples
- Computer files

# Vice President

## Characteristics:

- Desire to serve the PTA, the school, and ultimately the students
- Understanding of the organization's mission
- Good listening skills
- Effective communication skills

## Responsibilities:

- Assist the president
- Perform the duties of the president if the president is absent or unable to serve
- Participate in executive board meetings and provide input for decisions
- Be an ambassador for the PTA and the school

## Additional duties as defined in the PTA's bylaws.

### Common additional duties include:

- Oversee committees, train committee chairpeople, and act as a liaison between committee chairpeople and the executive board
- Oversee fundraising selection, planning, and evaluation
- Serve as PTA parliamentarian
- Serve as a bylaws expert
- Be a liaison for new families
- Lead the annual membership drive

## Typical Monthly Tasks:

- Participate in executive board meetings
- Participate in general meetings

## Typical Annual Tasks:

- Familiarize yourself with Robert's Rules of Order
- Familiarize yourself with the PTA's bylaws
- Other tasks as designated by the executive board

## Training and Resources:

- One-on-one with outgoing vice president
- Articles about vice president topics
- Past files and examples
- Computer files

# Treasurer

## Characteristics:

- Desire to serve the PTA, the school, and ultimately the students
- Computer literate—must know how to use Spreadsheet/Accounting software or be willing to learn
- Good at keeping files
- Appreciate the value and power of a balanced budget
- Appreciate the value of a paper trail
- Not put off by paperwork, forms, documents, numbers
- “In touch” with school activities and PTA business, or want to become in touch
- Understand you are the custodian of other people’s money

## Time Commitment:

- Board meetings once per month
- PTA meetings once per month
- Most of the work can be done on your own schedule—after the kids are in bed, during the day, after work, whatever suits you

## Typical Monthly Tasks:

- Post all financial transactions to our financial system as they occur throughout the month
- Create monthly PTA Treasurer reports (Transaction Report and Performance to Budget)
- Reconcile the checkbook
- Write checks as needed (two signatures and proper paperwork required)
- Make deposits in a timely fashion, as needed
- Keep financial transaction forms available for all volunteers

## Typical Annual Tasks:

- Lead the annual budget development process in August
- Present the budget for approval at the September PTA meeting
- File Form 990/990EZ, the annual IRS return required for 501(c)(3) groups
- Renew our incorporation with the state
- Facilitate our annual audit

## Training and Resources:

- One-on-one with outgoing treasurer
- Articles about treasurer topics
- Past files and examples
- Computer files

## Secretary

### Characteristics:

- Desire to serve the PTA, the school, and ultimately the students
- Understanding of the organization's mission
- Good listening skills
- Effective communication skills
- Good computer skills
- Strong organizational skills

### Responsibilities:

- The secretary's responsibilities include both record-keeping and communications.
- Prepare agendas for general meetings
- Record and distribute minutes of executive board meetings and general meetings
- Take attendance at board meetings. Take record of members at general meetings (sign in sheet).
- Maintain a complete file of all approved minutes, agendas, and materials distributed at any official PTA meeting Typical

### Monthly Tasks:

- Attend executive board meetings and participate in discussions and decision making
- Record minutes of executive board meetings
- Prepare agendas for general meetings, as developed in the executive board meeting
- Photocopy the minutes from the last general meeting for distribution (and approval) at the upcoming general meeting
- Record minutes of general meetings and distribute them in a timely manner

### Typical Annual Tasks:

- Familiarize yourself with Robert's Rules of Order, especially the instructions about the content and format of an agenda and minutes
- Set up a filing system at your house and on your computer

### Membership records:

- Receive new applications and verify it is accompanied with dues.
- Keep an up to date Membership Roster. Input in spreadsheet.
- Print Membership Cards.
- Keep a Roster of Committee Members and Committee Chairs.
- Legal Documents such as tax returns