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Main Roles: Chair, Secretary, Treasurer – can have others who are named or just ordinary members who assist the main roles.

Recommended between 5 – 7 committee members (to ensure you have a majority to vote – don't all have to be at every meeting but needs to be more than 2 as the Chair has the deciding vote if it is a tie.)

3 types of meetings:

21 days notice - **AGM/EGM** – everyone invited to vote on rules and regulations and to elect the committee for the upcoming year. Include committee roles and the Trustee eligibility form (for due diligence) Committee members are also trustees who are responsible for & accountable for the Charity. Update the Charity commission of any changes. Quorum is double the number of committee members so if you have 7 committee members you have to have at least 14 people to vote. Recommend you come along with one other person so you ensure you have that quorum. Or tag it on to an event at school to meet your quorum.

Committee Meeting – Just the committee members – who vote.

Ordinary open meeting – Open to anyone to share ideas. Input and opinions put forward by parents/staff. Say goodbye to those people and the committee vote on those ideas taking into consideration the views of the people at the meeting.

PTA committee members

Your PTA's committee is made up of Officers and Ordinary Committee Members. Your committee are elected at your Annual general meeting and are responsible for managing your PTA.

All committee positions are elected by your PTA's members at its annual general meeting (AGM). PTA committee members hold their position for one year, until the next AGM. To be nominated and elected, committee members must also be members of the association.

Your PTA's committee is made up of officers and ordinary committee members. The officer roles are usually Chair, Treasurer, and Secretary. All other members elected to the committee are ordinary committee members, and your committee members can decide whether to give them appropriate titles.

A co-opted committee member is elected by your committee and not your members to either take over a certain role or because they have a particular skill. They would hold the position until the next AGM when, if applicable, they can stand for election to your committee by the members.

PTA committee member **vetting**

If your PTA is a registered charity, the Charity Commission will expect your committee to carry out due diligence checks, by asking trustees and members to complete a trustee eligibility declaration form.

All PTA committee members should be vetted annually to ensure they're eligible for the post. It's usually a criminal offence for someone to be a trustee if they meet the disqualification criteria: they must stand down with immediate effect. That person can continue to volunteer for the charity, but cannot be on the committee. If your PTA is a registered charity, each elected committee member should sign the Charity Commission for England and Wales's [Trustee Eligibility Declaration Form](#), and read the [Safeguarding Guidance](#). The completed form should be kept as an internal document to demonstrate that the association has carried out due diligence.

You must not act as a trustee if you are disqualified under the Charities Act, including if you:

- Have an unspent conviction for an offence involving dishonesty or deception (such as fraud)
- Are bankrupt or have entered into a formal arrangement (for example, an individual voluntary arrangement) with a creditor
- Have been removed as a company director or charity trustee because of wrongdoing

Role of PTA Chair

It's best practice to have the role of PTA Chair filled. If your PTA's Chair leaves mid-year, or if you're finding it difficult to recruit someone into the role, the job can be done by other committee members taking it in turns to chair your meetings. The PTA Chair (or any other committee member) may not step down if doing so leaves less than the minimum number of committee members required by your constitution.

Some associations have Co-Chairs or Joint-Chairs. In this case, both individuals are equally responsible for fulfilling the role and should take it in turns to chair meetings. They should decide before the start of the meeting who will chair it, and who will hold the casting vote.

A Vice-Chair is different to Co-Chairs or Joint-Chairs. If you have a Vice-Chair, they will deputise for the PTA Chair, and would step into the role of PTA Chair if they are absent or step down. The skills required for a Vice-Chair are the same as for the Chair.

Main purpose of the PTA Chair

The PTA Chair directs your committee's meetings, making sure everyone's views are heard, and that everyone is involved in the meeting. They should make sure all committee members are familiar with the association's constitution, model policies if applicable, and their role and responsibilities as a committee member (and trustee, if your PTA is registered as a charity). The PTA Chair also holds the casting vote where there is a tied vote. This usually defers the decision to the following meeting, allowing committee members more time to consider and discuss the matter.

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

Role of PTA Treasurer

The PTA Treasurer makes sure all committee members carry out their duties in relation to the control and management of PTA funds. Your association's committee is collectively responsible for the finances of the association and must therefore formally agree to any spending of funds. However, it's the treasurer's responsibility to ensure all financial transactions are presented and recorded correctly.

Main purpose of the PTA 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/SUM UP
- 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 (if necessary over £25,000)

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

The PTA Treasurer has an important role, and may find the following points useful:

If using a computer accounting package or spreadsheet application, always make regular backups

Never hand over a blank signed cheque

bank money regularly and never leave cash on display – use a night safe if available

Keep your accounts simple and easy to read
 Always account for everything you receive and/or pay out
 Review regular suppliers' charges and your established practices from time to time
 When retiring from your role, allow time to familiarise your successor with your system, even if there are plans to change it
 Keep your records up to date
 File receipts in date order. This will make them easier to audit and refer to at a later date
 Change passwords regularly, especially when a committee member steps down
 Ensure you have read a copy of your association's insurance policy summary, detailing cash cover and adhere to any guidelines.

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. Read more about sound [financial governance practices](#) and [financial reporting](#) for PTAs.

Role of PTA 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

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.