

Role of Chair

It is best practice to have the role of Chair filled. If the Chair leaves mid-year, or if it is difficult to recruit someone into the role, the job can be done by other committee members taking it in turns to chair meetings. The Chair may not step down if this leaves less than the minimum committee requirements as per the constitution.

Some associations have Co-Chairs/Joint Chairs, in this case they are both equally responsible for fulfilling the role and should take it in turns to chair meetings, this should be decided before the start of the meeting.

If there is a Vice Chair they will deputise for the Chair and would step into the role of Chair if they were absent or had stepped down. The skills required for a Vice Chair would be the same as the Chair role.

Main purpose of the role

The Chair directs the meetings, making sure everyone's views are heard and everyone is involved in the meeting. He or she 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 (all committee members are automatically trustees if you are Charity registered).

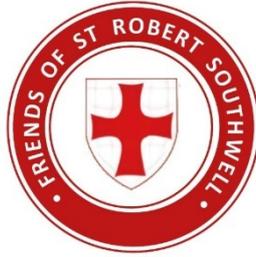
Duties & key responsibilities

- Prepares for meetings (with the Secretary)
- Invites committee members, parents and staff
- Suggests items for the agenda
- Identifies outstanding items from last meeting
- Prepares introductions for any new members attending
- Sets the ground rules for meetings and makes sure they are inclusive and efficient
- Delegates tasks to other members and volunteers, and checks they are completed
- Liaises with the school and requests a 'wish list' for the committee to agree what to fund

- Ensures the committee fulfils its role in respect of governance of the association as set out in the constitution, for example holding an AGM, election of committee, working with the Treasurer to ensure annual returns are completed if the association is Charity registered
- Ensures any decisions made are clear, fit the objects of the association and by agreement of the committee as per your constitution.
- The Chair cannot make decisions alone - all decisions are made by the committee as a whole.
- Writes the annual report for the association (with the Secretary)
- Can be a signatory on the association's bank account (along with at least one other committee member)
- Making sure the association is GDPR compliant

Key skills

- Confident and assertive –able to control meetings and call to order when necessary, making sure everyone has an opportunity to speak.
- Ability to remain impartial – make sure contributions are brief and ensure everyone's views are respected.
- Calm, friendly and approachable – as the main point of contact for the PTA for the school and parents the Chair must be inclusive and make sure everyone feels welcome.
- Organised and able to delegate – most associations have lots of activities going on and the Chair should make sure the workload is shared and tasks are completed as agreed.



Role of Secretary

As one of the three key committee roles, it's best practice to have the role of Secretary filled

Main purpose of the role

The Secretary supports the Chair to build effective communication links between the school and the association and maintains accurate records (see below).

The Secretary deals with all the correspondence that the association receives and helps the Chair ensure that committee meetings run smoothly. Building up a good relationship with the school administration team will help make sure that correspondence, sent to the school, is passed onto association promptly.

As well as dealing with correspondence, following a committee meeting, the Secretary will need to make bookings and other arrangements for events, confirm arrangements made by telephone in writing (by letter or e-mail). 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 association.

Duties and key responsibilities

- Prepares for meetings (with the Chair)
- Prepare and distribute agendas
- 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
- Making sure that the association is GDPR compliant
- Updates trustee details with Charity Commission (as appropriate)
- Assists the Chair writing the annual report for the association
- May be a signatory on the bank account (along with at least one other committee member)
- Handles written and email correspondence received for the association
- Build strong relationships with key school staff – including the administration team and the caretaker/on site supervisor

Key skills

- Organised and efficient – keeps accurate records in a format that can easily be handed over to 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 committee.



Role of Treasurer

Although all committee members have equal responsibility for the control and management of funds, the treasurer has an important role, making sure these duties are carried out properly.

Main purpose of the role

The Treasurer ensures accurate financial records are kept and best practice procedures are followed for counting money, banking and making payments. He or she should keep the committee updated with regular reports and ensure end of year reports are completed for the association's AGM and (if applicable) the Charity Commission annual return.

If there are co-treasurers, they are both equally responsible for carrying out the role. If you have a ~~vice~~ treasurer they deputise for the treasurer and carry out the role if the treasurer is absent or steps down from their position.

Duties and key responsibilities

- Keeps up to date and accurate financial records.
- Presents financial updates at each committee meeting.
- Manages the association's bank account and holds the association cheque book.
- Arranges changes of signatories on the association bank account.
- Manages different payment platforms
- Ensures all bank cards, cheque books and paying books are accounted for and obtained from any individual leaving the association
- Ensures best practice procedures for counting and banking money after events are in place and followed.
- Makes approved payments.
- Ensures procedures for making approved payments and claiming approved expenses are followed by all committee members.
- Prepares annual treasurer's report for AGM and arranges an independent examination of the association accounts.

- Completes the Charity Commission annual return.
- Manages Gift Aid (or assists the committee member responsible for managing Gift Aid).
- Ensure you have read a copy of your association's Insurance Policy Summary, detailing cash cover and adhere to any guide

Good Financial Governance Practices

- Review financial statements every month.
- Financial Position reporting is a standing monthly agenda item.
- More than one person can access bank statements online.
- If you have online banking or have opted out of receiving paper statements, consider getting paper statements reinstated from the bank to feature in monthly update.
- Fully review financial position at least quarterly.
- Check all expenses and receipts tally to Balance Sheet / Accounting software.
- Adopt an acceptable, universally agreed financial thresholds (see suggested matrix below).
- Ensure proper financial reporting routines are observed and understood by all members.
- **Important:** Charity law requires all charity trustees to prepare annual accounts for their charity.
- These accounts are subject to an independent rev

Suggested Financial Practice Matrix

Threshold	Association Action
Under £10	Receipts required and retained for future use / inspections
£10 - £50	Bank Mandate rules apply - 2 from Bank Account Mandate signatories to sign, receipts and invoices retained for review
Over £50	Bank Mandate rules apply - 2 from Bank Account Mandate signatories to sign; receipts and invoices retained for review, all items above £100 reviewed and evidenced on statements; recorded at termly meetings for visibility.

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 – it’s a busy role. The Treasurer must be able to remain calm during busy times, and ensure he or she does not work in isolation by communicating regularly with the rest of the committee.



Although chair, treasurer and secretary are the three most common named committee roles, sometimes these are split further to spread the workload. Breaking down roles gives more people the chance to take part and is especially helpful when you're struggling to find volunteers with time to commit to a bigger role. They vary from committee to committee depending on the skills of members but might include some of the below.

Raffle & sponsorship coordinator

The main focus of this role is to contact businesses and individuals to see how they can support the school, be it with raffle prizes, sponsorship, volunteering or anything else. They will also make sure licensing is up to date, arrange raffle ticket printing, coordinate the selling of tickets and distribute prizes.

Stores person

A stores officer is in charge of the association's stores, which includes keeping an inventory and making sure items are stored properly and safely. This means the association does not spend money on things it already owns, items are used before they go out of date and the association store never ends up as an overwhelming mess no-one wants to tackle!

Grants secretary

A grants secretary's role is to research and apply for grants. This involves working with the school and committee to establish what needs funding, finding grants that are suitable for your school, gathering evidence and writing applications. Writing skills are crucial and a fundraising background would be beneficial.

Year reps

Year group reps are a visible point of contact between parents and the association. They can help to spread messages more locally and mean the rest of the committee isn't spreading itself too thin in reaching out to the community. It also means all year groups are represented. Year reps are key in securing volunteers for events.

Publicity officer

A publicity officer handles all of the association's publicity for events, activities and fundraising initiatives. This includes the PTA website, emails, social media, posters, flyers and banners. It may also involve liaising with the local press and writing press releases. Good writing and design skills are vital to ensure your advertising material is engaging and exciting.

Second-hand uniform coordinator

Second-hand sales are great moneymakers while providing a service to parents and preventing waste. A second-hand uniform coordinator takes in unwanted uniform, washes it, mends it (if necessary) and then sells it on.

Bake sale coordinator

A bake sale coordinator organises the dates and timings of your fundraising sales and seeks cake donations. They ensure sales are run safely and hygienically and coordinate the collection of product donations on the day. They may also make some themselves, with the cost of ingredients usually being covered by PTA funds.

Assist the big three

While all of these roles help relieve the workload of the main roles and keep the association running smoothly, there are some specific jobs that work more closely with the chair, treasurer and secretary:

Vice/co-chair

The vice or co-chair can support the chair in their role and also take over in their absence. The role involves working closely with the chair in their work, including running meetings, encouraging volunteer participation, and organising events.

Assistant treasurer

An assistant treasurer is a huge help in making sure money is stored safely during and after Events. They can work with the treasurer during big events, with one person going around and skimming the big notes from the floats and the other guarding the money.

Communications secretary

A communications secretary relieves some of the secretary's workload by taking on the communications aspect of their role. This includes overseeing the association's online accounts, which may include Facebook and Twitter, plus emails, newsletters and noticeboards.

Remember

Having too many named roles can mean more people need to attend your meeting for it to be quorate, as a certain number of named roles have to be there.

Skills audit

It's all too easy for talented parents who are perfect for these roles to slip under the radar.

[\(*running-a-pta/community-engagement/parents-questionnaire/*\)](#)

Get parents to fill it in and find out all about their skills, connections and opinions of the association. Discover which job roles might suit them, whether they are employed by a company that offers match funding, sponsorship or raffle prizes, and what events they would be interested in attending.



Committee roles & responsibilities

Committee structure

The key elements of the structure of the association are the:

- constitution (governing document)
- members
- committee
- trustees

Constitution

All associations need a constitution. This is a document which establishes the fundamental rules by which the association is governed and describes:

- the aims of the association and its powers
- its membership
- the size of the committee and how members are elected
- the need for an annual audit/independent examination as best practice
- annual general meeting and committee meeting
- It is good practice to adopt a constitution at the outset or as soon as you are aware that your association does not have one.

Members

The type of association you're the school has or wishes to establish will depend on its membership:

- in an association, such as a Friends of, Parent, Teacher and Friends Association (PTFA) or Community Association (CA), the members may be those described above plus any persons over the age of 18 wishing to offer appropriate support or help to the school/association who is deemed suitable as a member by the Committee e.g., grandparents, members of the local community.
- Anyone that wishes to be considered as a member still need to be approved by the committee. The committee should keep a list of these persons so they can be invited to meetings. Those approved are also eligible to be nominated and elected for a committee role.
- It is important that the definition of membership is clear in the constitution. Members are not legally responsible for the actions of the association. It is only the elected committee members who are legally responsible for the management of the association.

Committee

A committee is a team of volunteers who are elected at the association's Annual General Meeting (AGM) to manage the association on behalf of the members. The current elected committee are equally legally responsible for running the association and its property and funds.

There are two types of committee member, Officer and Ordinary Committee member. Officers have specific roles such as Chair, Treasurer or Secretary. Ordinary Committee Members play a vital role working alongside and supporting the Officers.

It is normal for the size of the committee to vary, depending on the size of the school. The minimum number with which it is possible to operate is two, usually a Chair and a Treasurer.

There is no restriction on the maximum number of committee members. However, it is in the association's interest not to make a committee too large, as this may prove to be unmanageable. Check the constitution for the associations' minimum committee requirements and who may have a deciding vote, as these may vary.

Additional support

In addition to the elected committee, it is valuable to have a list of volunteers/helpers, who are willing to support the work of the committee. Volunteers/helpers and any automatic members **are welcome** to attend open association meetings. Being a volunteer can be a gentle introduction to the association, many volunteers go on to being elected committee members.

Trustees

If the association is a registered charity all the elected committee members (Officers and Ordinary) automatically become Trustees of the association (charity) and have a legal duty to ensure that the association (charity) acts lawfully and is managed properly. A Trustee Eligibility Declaration form should also be signed by the elected committee and kept as an internal document to show the association have done their due diligence in making sure all elected committee members/ trustees are both eligible and suitable to act as trustees of the charity.

Whilst Trustees have a legal duty it is important to remember that all decisions should be made collectively by the committee. No one individual should take sole responsibility for a committee decision or activity.

Committee members and trustees are the same people. You should not have anyone on the committee that is not listed as a trustee, and you should not have trustees that are not current elected committee members. Trustee list should be updated with the Charity Commission after each committee change.

