

## RANKIN ELEMENTARY PTA ROLES & RESPONSIBILITIES



The board shares a few, very specific responsibilities. They include the following:

- **Duty of Care.** Each board member has a legal responsibility to participate actively in making decisions on behalf of your PTA and to exercise his or her best judgment while doing so.
- **Duty of Loyalty.** Each board member must put the interests of the organization before their personal and professional interests when acting on behalf of the organization in a decision-making capacity. Your PTA's needs come first.
- **Duty of Obedience.** Board members bear the legal responsibility of ensuring that your PTA complies with the applicable federal, state and local laws and adheres to its mission.
- **Focus on and evaluate your goals.** Your board should have overall goals for the year that are in line with [PTA's mission](#), including membership goals. Regularly assess progress toward those goals.
- **Set the tone.** Maintain a positive working relationship among your PTA board members and a welcoming environment for the rest of the membership. For more info, see [Leading the PTA Way](#).
- **Know and follow your organization's bylaws, as well as applicable state and federal laws.** These are the rules your PTA will follow.
- **Know your finances.** As a first step, you'll need to approve and oversee your [budget](#).
- **Plan for rotation and transition.** Your PTA board will grow stronger when you consistently recruit new members and leaders. Know when your term ends, and plan for a smooth transition by saving reports, files and notes for your successors.

In addition, each board member has additional responsibilities:

# Welcome, PTA Leaders!

You have an exciting opportunity to make a difference in your school and community by implementing PTA's mission:

***...to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.***

This guide provides many tips and resources to help incoming local PTA officers get off to a successful start.

Congratulations and thank you for taking on this important role in your community!



***Did You Know***

- **Your PTA** is an independent nonprofit association. That means your members get to make the decisions—members approve your bylaws, elect your officers, and inform your budget and plans. While you may partner with or focus your efforts on a school, your school principal is not in charge, though you should follow school policies for community collaborations. If you are struggling with effective collaboration, use this guidance from National PTA or contact your PTA council or state PTA for coaching and support.
- **Your PTA** is an advocacy organization—not a booster organization. Like any nonprofit, you will raise money for your cause. But your PTA should focus most of its time implementing PTA's mission through family **programs** and child **advocacy** opportunities.
- **Your PTA** supports your state and National PTA—and vice versa. Your PTA and thousands of other PTAs exist to achieve the PTA mission. With your support, National PTA's social and policy impact has been felt in schools, in school districts, in state assemblies and on Capitol Hill since 1897. Learn more about National PTA's advocacy efforts and achievements.

## Get Organized!

PTA boards work as a team to fulfill PTA's mission and meet your PTA's specific goals.

# The PTA Mission, Values, and You

National PTA's mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children. Everything we do is driven by [this mission and our core values](#):

- Collaboration
- Commitment
- Diversity
- Respect
- Accountability

**There are three steps to get organized:**

### **1. Get Connected to PTA**

### **2. PTA Board Roles & Responsibilities**

The board shares a few, very specific responsibilities. They include the following:

- **Duty of Care.** Each board member has a legal responsibility to participate actively in making decisions on behalf of your PTA and to exercise his or her best judgment while doing so.
- **Duty of Loyalty.** Each board member must put the interests of the organization before their personal and professional interests when acting on behalf of the organization in a decision-making capacity. Your PTA's needs come first.
- **Duty of Obedience.** Board members bear the legal responsibility of ensuring that your PTA complies with the applicable federal, state and local laws and adheres to its mission.
- **Focus on and evaluate your goals.** Your board should have overall goals for the year that are in line with **PTA's mission**, including membership goals. Regularly assess progress toward those goals.
- **Set the tone.** Maintain a positive working relationship among your PTA board members and a welcoming environment for the rest of the membership. For more info, see **Leading the PTA Way**.

- **Know and follow your organization's bylaws, as well as applicable state and federal laws.** These are the rules your PTA will follow.
- **Know your finances.** As a first step, you'll need to approve and oversee your **budget**.
- **Plan for rotation and transition.** Your PTA board will grow stronger when you consistently recruit new members and leaders. Know when your term ends, and plan for a smooth transition by saving reports, files and notes for your successors.

**In addition, each board member has additional responsibilities:**

### **A PTA President's Roles & Responsibilities**

Your PTA members look to you for leadership in creating partnerships within your community and fostering an environment where family engagement is encouraged and respected. Responsibilities include:

- Chairing board and general meetings
- Overseeing fiscal compliance
- Serving as a liaison with school administration or community partners
- Checking in regularly with officers and committees to ensure the overall plan is on target
- Identifying challenges and inviting solutions
- Familiarizing yourself with all PTA programs and resources
- Representing PTA to the community
- Recruiting and mentoring volunteers and future leaders
- Volunteering at events, when available

Great presidents often have leadership, planning and public speaking skills and experience.

## **A PTA President's First 30 Days**

If your team takes each of the following steps in (roughly) your first month in office, you'll be off to a fantastic start! These are great things to do during the summer months as you prepare for the school year.

### **#1: Gather.**

There are several items you'll want to put your hands on right away, to be sure important records aren't lost in the transition. PTA records and materials belong to the unit, not to any one individual, and all materials should be passed on to the new leaders. These include:

- **Your PTA's Bylaws.** You and your board are responsible for following the bylaws, so you need to know what they say. If they are old and no longer relevant, one of your first moves should be to establish a bylaws revision committee to start the work necessary to make the document work for your current PTA. Your **State PTA** can help.
- **PTA Procedure Book or "Board Book".** Whether it is an electronic file, a cardboard box full of papers, or a binder thick with documents, get up to speed on what has happened in the past.
- **The most recent audit.** You may need to talk to the treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done as soon as possible. You will want to start fresh with a new set of books, so be sure the previous accounts are "closed" or "zeroed out" and audited.
- **Bank statements and electronic access.** Make sure you have the usernames and passwords, documents, accounts, etc., to access your PTA's financial information.

### **#2: Listen.**

Before you begin planning, it is important to understand your unique community's strengths and needs. You will do more of this in the months to come, but for now:

- **Convene with the outgoing president and officers.** Talk about how you will reach out into your school and community to understand the priorities for your PTA. What worked last year? What did not? Who do they see as volunteers to encourage and grow?
- **Introduce yourself to the school personnel and administration.** Ask about their priorities for the year and tell them you are interested in helping them achieve their goals. If your PTA is a community or district-wide PTA, reach out to district and community partners in your area and offer to work collaboratively.
- **Introduce yourself to families and members of your PTA.** Ask what they think is working or not working. It is important for members to see a smooth transition and to feel that new leaders welcome their questions, ideas, and participation in the year ahead. A great way to start is with a survey. Every interaction is an opportunity to encourage members to renew and new families or teachers to join.

### **#3: Protect.**

Take these few, critical steps right away to safeguard your PTA's nonprofit status and protect your unit from theft, fraud, and liability.

- **Your unit is a 501(c)(3) nonprofit** (all PTAs are), so ask your outgoing president or treasurer for the most recent IRS Form 990 filing. For more info, see **Your 501(c)(3) Status**.
- **Change the signatures on your PTA's bank accounts.** You will want to be sure previous officers



no longer have access to your financial accounts. A transition letter from the outgoing treasurer to the bank may be necessary to enact this change.

**Ask your state office** if you are required to have insurance and when the payment is due. Insurance can protect your board members, events, and PTA property.

### A PTA Treasurer's Roles & Responsibilities

Your PTA relies on you to ensure that appropriate financial records are kept, a budget is established and followed, and controls are in place to prevent theft or fraud. Responsibilities include:

- Keeping accurate records and submitting written financial statements for meetings
- Chairing the Budget Committee, which prepares and monitors the annual budget
- Ensuring an audit, financial review or compilation is done in accordance with the bylaws
- Preparing an annual report to be used to review your PTA financial records
- Filing your PTA's 990 report to the IRS on time—if your unit is a 501(c)(3)
- Submitting state-level reports and filings as required
- Overseeing proper handling of money, such as ensuring money is collected, counted, recorded and deposited promptly and appropriately
- Ensuring financial checks and balances are in place at all times



Great treasurers often have skills or experience with basic financial management. Training and tools are available from your state PTA and [National PTA](#).

## **A PTA Treasurer's First 30 Days**

If you take each of these steps in (roughly) your first month in office, you'll be off to a fantastic start!

### **#1: Gather.**

There are several items you'll want to put your hands on right away to be sure important records aren't lost in the transition. Collaborate with your PTA president and past officers to gather these records. If any records are missing, [contact your State PTA](#) for guidance. Records to gather include:

- **Your PTA Bylaws** (and any accompanying standing rules) to find important information about how finances are to be handled and how funds are to be disbursed.
- **Current year's budget** to guide any immediate expenditures, as well as prior year budgets, to help you get ready to draft a [budget](#) for next year.
- **Receipt book** to acknowledge money received.
- **Checkbook** to disburse funds as authorized by the current year's budget and bylaws.
- **Treasurer's account book** in which to keep the PTA's financial records. If this is an electronic file or system, schedule time to be trained on how it works.
- **IRS tax information**, including your unit's IRS determination letter of tax-exempt and/or application (if you have it), federal employer identification number (EIN), and copies of filed Form 990 or other required tax forms. You should also have information regarding your state tax status, including sales tax.
- **The most recent audit report and recommendations.** If an [audit](#) did not occur after the latest transition of officers, make sure to get one done. You will want to start fresh with a new set of books. Be sure the previous accounts are "closed" or "zeroed" out and audited.

- **Bank statements and electronic access.** Gain access to and then change the usernames and passwords for all accounts - for many units, this includes both a checking and a savings or reserve account.

## **#2: Protect.**

Take these few important steps right away to safeguard your PTA's nonprofit status and protect your local PTA from theft, fraud and liability.

- **Make sure IRS Form 990 was filed properly** for the most recent year. See [Your 501\(c\)\(3\) Status](#) and/or the [501\(c\)\(3\) Basics for Local PTAs eLearning Course](#) for more information.
- **Change the signatures on your PTA's bank accounts.** You will want to be sure previous officers no longer have access to your accounts. A transition letter from the outgoing treasurer or president to the bank may be necessary to enact this change. Also, make sure the bank has your PTA's EIN on file, rather than an individual's social security number.
- **Ask your state PTA** what is required for [insurance](#) and when the payment is due. Insurance can protect your board members, events, and PTA property.

## **#3: Prepare Your Team.**

With your PTA president, set and communicate the fiduciary standards by which your PTA team will be bound.

- Establish or update procedures for handling money, getting reimbursed, and applying for grants.
- Educate your board about how to read the budget and encourage them to ask good questions.
- Seek other PTA members with experience writing grants, assisting with sponsorship and helping to raise funds.

## A PTA Secretary's Role

You will serve your PTA by keeping an accurate record of meetings, which become part of the permanent history of the PTA. See the "Taking Minutes" section of [Running PTA Meetings](#).

In some PTAs, the secretary also has the responsibility of maintaining all PTA correspondence, including communications with members and notifications for meetings. Because of this, sometimes this position is split into two roles: Recording Secretary and Corresponding Secretary.

Great secretaries often have prior volunteer and/or meeting experience and are enthusiastic about PTA.

## A PTA Secretary's Responsibilities

### #1: Gather and Maintain Essential Documentation.

There are several items you'll want to put your hands on right away to be sure important records aren't lost in the transition. Collaborate with your PTA president and past officers to gather these records. If any records are missing, contact your [State PTA](#) for guidance. Records to gather include:

- **Your PTA Bylaws** (and any accompanying standing rules) to find important information about how finances are to be handled and how funds are to be disbursed.
- **PTA Procedure Book or "Board Book"**. Whether it is an electronic file, a cardboard box full of papers, or a binder thick with documents, get up to speed on what has happened in the past.

### #2: Organize and Record Meetings.

Ensure that meetings are efficient by providing written communication with your PTA members and board. These responsibilities include:

- Working with the president to create an agenda
- Sending out meeting announcements, agendas and supporting documents

- Taking attendance and checking for quorum (minimum number of members who must be present to conduct business at a meeting) during voting
- Taking minutes, including counting and recording any votes
- Presenting the [draft minutes](#) of the previous meeting, making any corrections and ensuring approved minutes are included in your PTA's permanent record

### A Vice President's Role

A vice president may be called upon at any time to assume the role of president, temporarily or until the position is filled in accordance with your bylaws. Responsibilities include:

- Implementing duties delegated by the president
- Representing the president in his or her absence
- Performing specific duties as provided for in the bylaws
- Familiarizing yourself with all PTA programs and resources
- Preparing for leadership by attending additional training opportunities and events that may be offered by your council, region, state or National PTA

Great vice presidents often learn or possess leadership, planning and public speaking skills.

### 3. Understand Your Bylaws

All officers and board members should be familiar with and prepared to follow their local unit bylaws. Bylaws are adopted and amended by a vote of your members at a general meeting. Local bylaws may not conflict with the [bylaws of National PTA](#) or your [state PTA](#), or with state or federal law.

As a [501\(c\)\(3\)](#), bylaws are required to achieve and maintain nonprofit status.

**Action Step:** If you cannot find a copy of your PTA's bylaws, [contact your state PTA office](#) to obtain one. Any member has a right to view your bylaws. Each board member should have his or her own copy. The entire board is responsible for your success, but remember, it is not the job of the officers to "do it all." You will recruit committee chairs and volunteers to help you accomplish each of your PTA's goals.



Cost of each PTA MEMBERSHIP Is \$5.00  
Visit the PTA weblink to pay and join online.  
<https://rankinpta.memberhub.com/store>

Thank you!!  
Rankin Elementary PTA