



Scottish Parent Teacher Council

Information Leaflet

Office Bearers and their Roles

As always with PTAs/PAs, trying to describe organisational arrangements is very difficult as there is no one prescribed model; PTAs/PAs can operate as informally or as formally as members want. However, they usually work on three levels:

- general membership - i.e. all the parents (and, in PTAs, teachers/staff) at the school
- committee - responsible for the day-to-day running of the group
- office bearers - responsible for ensuring that all decisions are carried out and that money is handled properly.

Although many people think of the committee as “the PTA/PA”, in fact the membership is the PTA/PA and has ultimate authority; the committee and office bearers run the organisation on behalf of the members and have to report back to them at least once every year at the AGM. The fact that hardly anyone ever turns up to an AGM, does not change this relationship and it is very important that the committee always remembers that it acts on behalf of the members.

For their part, the office bearers are not a random selection of people with posh titles. They are there because there are actual jobs to be done: the jobs define the office bearers, not the other way round, and it is worth following proper procedures both to ensure that the PTA/PA runs properly and to protect the individual office bearers from charges of mismanagement.

In general the jobs can be described as follows:

- ensuring that everything runs smoothly and that all decisions are carried out – the job of the Chairperson
- looking after all the paperwork such as the minutes, agendas, correspondence and letters sent to parents – the job of the Secretary
- looking after the money, keeping track of income and expenditure, dealing with the bank/building society – the job of the Treasurer

Whilst it is possible to divide the jobs up differently or have two people do one job, on the simple model of one office bearer doing one job, the office bearers' roles are as follows.

The Chairperson

It is good practice for the Chairperson to always be a parent. S/he is ultimately responsible for seeing that the organisation runs efficiently. S/he has to ensure that all the necessary organisational decisions are taken for all PTA/PA activities. S/he is responsible for calling committee meetings, setting the agenda and ensuring that the meeting gets through the agenda. It's a good idea to identify in advance what the major items are, what decisions have to be made and then make sure that these items get adequate time. If necessary, the Chairperson should draw the discussion to a close and either ask for a decision or agree that the item will be continued at the next meeting. S/he also decides when it is necessary to have a formal vote and has a casting vote in the event of a tie.

The Chairperson can call an extra meeting as long as everyone on the committee is informed of the date, time and venue of the meeting.

Whilst not directly responsible for the paper work, the Chairperson should ensure that it is being managed properly, that minutes and agendas are accurate and out on time, that all correspondence is being shown to the committee and that any agreed letters are being written; s/he has to check that all necessary school lets are being taken out; that the Treasurer is managing the money properly, presenting an accurate report on the finances at each meeting and making the necessary arrangements for the annual audit.

The Chairperson has the same responsibility for the AGM that s/he has for committee meetings: s/he has to see that notices are sent out on time and the business of the meeting is got through.



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The Secretary

The Secretary can be a parent or teacher. S/he is responsible for taking and writing up the minutes for committee meetings and the AGM. S/he should show these to the Chairperson for immediate correction before sending them out to the rest of the committee. These draft minutes are then corrected and formally approved at the next meeting.

The Secretary is responsible for all correspondence, both incoming and outgoing, including any notices that are sent out to parents. S/he is responsible for ensuring that the committee is advised of all correspondence and for keeping PTA/PA records. This means keeping a file with the agendas, minutes and correspondence in it. The Secretary usually makes the detailed arrangements for any meeting, including taking out the lets, and is the contact person for any visitor.

The Treasurer (see also leaflet on Money Matters)

The Treasurer can be a parent or teacher. S/he is responsible for handling the money, organising arrangements for counting money at a fundraising event, maintaining the financial records and paying all bills, including any expenses incurred by other committee members. (It is good practice to require receipts.) S/he usually holds the cheque book or similar and deals with the bank or building society. S/he should present a financial report at each committee meeting, detailing any income and expenditure since the last meeting and the current balance.

The Treasurer is responsible for organising an annual audit of the accounts and whilst this does not have to be done by an accountant, it should be done by someone who is good with numbers e.g. someone who works in a bank or building society. It also cannot be a member of the committee. Finally, the Treasurer has to make a financial report to the members at the AGM. This report should be put up in the school for everyone to see.