

Officer Roles & Responsibilities

President

Provide leadership by building relationships and creating a positive, welcoming environment where families feel encouraged to be involved. Lead with communication, stay organized, build relationships, and support your team.

Key Responsibilities

- Lead Meetings
 - Run board and general meetings, keeping them organized, on time, and focused.
- Ensure Compliance
 - Make sure finances, bylaws, and procedures are followed to keep the PTA in good standing.
- Build Relationships
 - Work closely with school staff, families, and community partners to support shared goals.
- Monitor Progress
 - Check in with officers and in some PTAs, committees, to keep plans moving forward.
- Problem Solve
 - Address challenges early and encourage teamwork in finding solutions.
- Know PTA Resources
 - Stay familiar with PTA programs and tools to support your unit effectively.
- Represent PTA
 - Act as the main spokesperson for your PTA within the school and community.
- Develop Leaders
 - Recruit, support, and mentor volunteers to build a strong future team.
- Stay Involved
 - Be present at events when possible to show support and stay connected.

A President's First 30 Days Include:

1. Gather (Get Organized)

Collect and review important documents to understand how your PTA operates:

- Bylaws (rules your PTA follows)
- Procedure/board book (past records and guidance)

- Most recent audit (financial review)
 - Bank access and financial information
2. Listen (Learn Your Community)
- Take time to understand needs before making plans:
- Talk with outgoing leaders about what worked
 - Meet with school administration to align goals
 - Connect with families and members for feedback
 - Use surveys or conversations to gather ideas
3. Protect (Secure Your PTA)
- Put safeguards in place early:
- Confirm IRS Form 990 is filed (nonprofit requirement)
 - Update bank account signers to current officers
 - Ensure proper insurance coverage is in place

Vice President

Support the president and be prepared to step into the president's role when needed, ensuring continuance of leadership. Be a reliable support system, stay informed, and be ready to lead at any time.

Key Responsibilities

- Support the President
 - Carry out tasks and responsibilities assigned by the president to help the PTA run smoothly.
- Fill in When Needed
 - Represent the president at meetings or events when they are unavailable.
- Follow Bylaws
 - Complete any specific duties assigned to the vice president role in your PTA's bylaws.
- Stay Informed
 - Learn about PTA programs, resources, and ongoing initiatives to effectively assist leadership.
- Prepare to Lead

- Attend trainings and events to build skills and be ready to step into the president role if needed.

Secretary

Keep accurate records, communicate clearly, and ensure meetings are well documented and organized.

Key Responsibilities

1. Maintain Records

- Keep official documents organized and up to date
- Collect and review important materials like:
 - Bylaws and standing rules (how your PTA operates)
 - Procedure/board book (past records and history)
- Ensure records are preserved and passed on during transitions

2. Support Communication

- Send meeting notices, agendas, and important updates to members
- In some PTAs, manage general correspondence (emails, notifications)

3. Organize Meetings

- Work with the president to prepare meeting agendas
- Take attendance and confirm quorum (enough members present to vote)
- Record clear, accurate meeting minutes
- Track and document votes and decisions

4. Maintain Official Minutes

- Share minutes from the previous meeting for approval
- Make corrections as needed
- Keep approved minutes as part of the PTA's permanent records

Treasurer

Manage the PTA's finances responsibly by keeping accurate records, following the budget, and ensuring safeguards are in place. Be transparent and proactive to keep your PTA's finances safe and on track.

Key Responsibilities

Maintain Records

- Maintain Financial Records
 - Track all income and expenses and provide clear financial reports at meetings.
- Lead the Budget Process
 - In some PTAs, chair the budget committee, help create and monitor the annual budget
- Ensure Compliance
 - Complete required filings (like IRS Form 990) and follow bylaws and financial rules.
- Oversee Audits
 - Ensure a financial review or audit is completed as required.
- Handle Funds Properly
 - Make sure money is collected, counted, recorded, and deposited correctly and promptly.
- Protect Finances
 - Maintain checks and balances to prevent errors, theft, or fraud.
- Complete Reports
 - Prepare an annual financial summary and submit any required state reports.

A Treasurer's First 30 Days Include:

1. Gather (Get Organized)

Collect key financial documents and tools:

- Bylaws and financial procedures
- Current and past budgets
- Checkbook, receipt book, and account records
- IRS documents (EIN, Form 990, tax-exempt status)
- Most recent audit report
- Bank statements and account access

2. Protect (Secure Finances)

- Confirm IRS Form 990 was filed
- Update bank account signers and passwords
- Ensure the PTA's EIN (not personal SSN) is on accounts
- Verify insurance coverage

3. Prepare Your Team (Set Expectations)

- Establish clear procedures for handling money and reimbursements
- Help board members understand the budget
- Encourage support for fundraising, grants, and sponsorships