



## Committee roles and 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 and general 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. PTA-UK has produced a model constitution for its members in England and Wales which has been accepted by the Charity Commission for England and Wales; we have also produced a version for our members in Northern Ireland, which is recognised by HMRC (Her Majesty's Revenue and Customs) Charities Division.

### Members

The type of association your school has or wishes to establish will depend on its membership:

1. in a Parents' Association (PA) members are limited to parents, carers and guardians of pupils currently at the school
2. in a Parent Teacher Association (PTA) or Home School Association (HSA) members are limited to the above plus the teaching and non-teaching staff currently employed by the school
3. in any other association, such as a Friends or Community Association (CA), the members may be those described in 1 and 2 above plus any persons 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

It is important that the definition of membership is clear in your constitution. Members are not legally responsible for the actions of the association. It is 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. There are two types of committee member, Officer and Ordinary (or Other) member. Officers have specific roles such as Chair, Treasurer or Secretary. Ordinary Committee Members play a vital role working alongside and supporting the Officers.

All committee members have equal voting rights, with the exception of the Chair, who has an additional casting vote, should this be needed.

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.

### **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. It would be acceptable for such volunteers to attend committee meetings but they would not have a vote; only elected committee members (Ordinary and Officers) can vote. Being a nominated PTA volunteer can be a gentle introduction to the committee and such volunteers may well go on to being a fully elected committee member with full voting rights.

### **Trustees**

If your 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.

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.

If your association is in England or Wales you can contact the Charity Commission to check if your association is already a registered charity. If your PTA is in Northern Ireland, you can check your charitable status with the HMRC (HM Revenue & Customs) Charities Division.

Fast track charity registration is available to PTA-UK members (England and Wales) who have adopted the PTA-UK Model Constitution. The Charity Commission expect that all committee members will have been subject to a recent Criminal Records Bureau (CRB) check.

### **PTA-UK Information sheets**

- Charity registration – England and Wales
- Charity registration – Northern Ireland
- Committee roles – chair
- Committee roles – secretary
- Committee roles – treasurer
- Good practice – committee meetings
- Good practice – general meetings
- PTA-UK model constitution – information
- Volunteer Checks – latest update

### **PTA-UK Resources**

- PTA-UK model constitution – England and Wales (November 2011)
- PTA-UK model constitution – Northern Ireland

### **Useful contacts**

- Charity Commission for England and Wales  
[www.charity-commission.gov.uk](http://www.charity-commission.gov.uk) / 0845 300 0218

- HMRC Charities Division  
[www.hmrc.gov.uk](http://www.hmrc.gov.uk) / 0845 302 0203

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**PTA-UK**

This PTA information sheet aims to provide clear advice but should only be considered as a general guide. Further information sheets are available from [www.pta.org.uk](http://www.pta.org.uk) For more specific advice please contact [info@pta.org.uk](mailto:info@pta.org.uk) or 0845 850 5460. Parent Teacher Associations UK, a registered charity no 1072833, a company limited by guarantee and registered in England no 3680271.

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## Committee roles - chair

This Information sheet should be read in conjunction with Committee Roles and Responsibilities.

The Chair provides leadership for the committee, sets the agenda for meetings and manages meetings in line with the agenda.

The Chair should ensure that issues are properly debated and an agreement is reached. Some committee members will be better at expressing themselves than others; it is important that the chair welcomes contributions from all members of the committee so that everyone feels involved. New members of the committee may feel nervous at first. The Chair should welcome all new members, introduce them to the other members and encourage them to play an active part in the discussions.

Occasionally, disagreements arise. The Chair should remain impartial, call the meeting to order without upsetting the parties involved, and make sure that the committee's decisions are not hindered in any way.

The Chair needs to work closely with the Treasurer and Secretary to ensure that the association is run effectively. The Chair can be a signatory for the association's bank account, along with either the Treasurer or Secretary or other elected committee member.

### Key responsibilities:

- provide leadership; ensure the Committee fulfils its role in respect of governance of the association
- set the agenda for meetings, liaising with the Secretary
- ensure the agenda is followed and that all business is covered
- call the meeting to order when it is time
- welcome and involve new members
- ask for apologies for absence
- sign the approved minutes of the last meeting
- agree a date for the next meeting
- close the meeting
- write the annual report, liaising with the Secretary
- sign cheques for the PTA with one other elected committee member
- get to know committee members

### PTA-UK Information sheets

- Committee roles and responsibilities
- Committee roles – secretary
- Committee roles - treasurer
- Good practice – committee meetings

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## Committee roles - secretary

This Information sheet should be read in conjunction with Committee Roles and Responsibilities.

The Secretary is responsible for ensuring that there are effective communication links between committee members and between the association and the school. 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 Secretary will help ensure that correspondence, sent to the school, is passed onto your association promptly. With the agreement of the Headteacher, the Secretary can usually arrange to leave PTA notices with the school Secretary for distribution with school mailings to parents or for distribution via 'pupil mail'.

As well as dealing with correspondence, following a committee meeting, the Secretary will need to make bookings and other arrangements for forthcoming 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 co-sign cheques on behalf of the association, along with the Treasurer, Chair or other elected committee member.

### Key responsibilities:

- deal with correspondence
- prepare agendas
- call meetings - giving plenty of notice
- keep a record of attendance at meetings
- take notes during meetings
- ensure that enough committee members are present to make the meeting quorate (this number is defined in the constitution)
- write up the minutes of meetings
- distribute minutes to all the committee
- make meeting & event arrangements
- co-sign cheques as required
- write the annual report with the Chair

### PTA-UK Information sheets

- Committee roles and responsibilities
- Committee roles – chair
- Committee roles - treasurer
- Good practice – committee meetings
- Good practice – general meetings

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## Committee roles - treasurer

This Information sheet should be read in conjunction with Committee Roles and Responsibilities.

A key responsibility for all committee members is to manage and control the funds the association raises. Although all the committee members have equal responsibility for the control and management of funds the Treasurer plays an important part in helping the committee carry out these duties properly.

The Treasurer should maintain a record of all income and expenditure. This can be done in a simple accounts book or using a computer based package. The Treasurer is responsible for handling the money raised at events, making approved payments and making arrangements for counting of money at events,

The Treasurer should report on the current financial position at each committee meeting and this should be recorded in the minutes. The report should include an update on any income and expenditure since the last meeting and the current balance. If the Treasurer is unable to attend a committee meeting, a written report should be sent to the Chair in advance of the meeting. All financial decisions taken should be recorded in the minutes of the meeting.

The Treasurer operates the bank account, reconciles the bank statements and liaises with the bank regarding changes to the bank mandate and list of authorised signatories. The Treasurer should retain the cheque book and arrange for all payments to be authorised by a second signatory ensuring regular payments, for example, PTA-UK membership, are made on time to guarantee benefits and take advantage of any discounts. The person co-signing must see what is being paid for before signing and once processed the original invoices should be kept by the Treasurer.

At each event, two people, the Treasurer and another committee member should take charge of monies received and count the proceeds before they leave the event venue. Once both parties agree the total, it should be recorded and then banked or placed in a safe overnight. We recommend that funds raised should not be kept at home. PTA-UK insurance provides cover for cash to specified limits. Please refer to the PTA-UK Policy Insurance Summary for further details.

The Treasurer should also be involved in pursuing charitable status and Gift Aid. Before the AGM, the Accounts will have to be drawn up in collaboration with the Chair and either audited or independently examined as specified in your constitution.

### Key responsibilities:

- maintain accurate and detailed financial records
- present a financial report at each meeting
- liaise with the bank
- make approved payments
- consults with the bank or building society regarding the availability of higher rate interest accounts
- count and bank monies
- prepare and co-sign cheques as required
- provide and account for cash floats at events
- charity registration and Gift Aid
- pay agreed expenses
- prepare annual accounts and liaise with the independent examiner of accounts
- ensure the committee has agreed appropriate procedures for the handling of financial matters



## PTA-UK Information sheets

- Charity registration – England and Wales
- Charity registration – Northern Ireland
- Committee roles and responsibilities
- Fundraising – Gift Aid
- Good practice – a guide for PTA treasurers
- Good practice – general meetings
- Good practice – managing PTA funds
- Good practice – PTA accounts

## PTA-UK resources

- PTA-UK Insurance summary

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