

# OFFICER DUTIES & RESPONSIBILITIES

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THIS IS A GENERAL GUIDE TO DUTIES OF THE EXECUTIVE COMMITTEE.  
YOUR BYLAWS MAY HAVE MORE DUTIES ASSIGNED TO THE OFFICERS OF YOUR PTA/PTSA.

## PRESIDENT

The president is elected to direct the affairs of the PTA in cooperation with the other members of the board of directors and the executive committee for a term of office specified in the bylaws.

### AS PRESIDING OFFICER the president does the following:

- **DETERMINES** the agenda in cooperation with the secretary;
- **CALLS** the meeting to order at the designated time, if quorum verified, proceeds with the PTA's business;
- **MAINTAINS** a fair and impartial position at all times and encourages members to participate
- **TAKES** no part in any discussion while presiding, refrains from expressing a personal opinion on questions before the house, and avoids personal bias when giving information to the association;
- **STANDS** to preside and follows the accepted order of business; refers to self impersonally as 'the chair';
- **DECIDES** all parliamentary questions. The president's decisions are subject to an appeal by any two members; a majority or tie vote sustains the decision of the chair;
- **STATES** each motion clearly after it has been seconded before allowing discussion;
- **DECLARES** the result of every vote taken;
- **CALLS** upon the president-elect/first vice president to preside when wishing to speak to a motion or to leave the chair; the president then has all the privileges of a member, including that of addressing the officer temporarily presiding, and returns to the chair only after the vote has been announced;
- **MAY** vote when voting is by ballot; in other cases, may cast a vote to create or break a tie if the result is in the best interest of the association;
- **RECOGNIZES** a member who has not previously spoken to the question in preference to one who already has spoken;

### AS ADMINISTRATIVE OFFICER THE PRESIDENT DOES THE FOLLOWING:

- **STUDIES** information and material from predecessor;
- **CONDUCT** meetings of the executive committee/board of directors;
- **ASKS** each committee chair to present a plan of work, presents plans of work to the board of directors meeting in advance of the first regular association meeting; plans be approved before committee work begins;
- **DELEGATES** to the vice president(s) administrative duties as needed;
- **SERVES** as *ex officio* on all committees except the nominating committee, and should not seek to influence the nominating process in any way;
- **BANK STATEMENTS** reviewed monthly and initialed;
- **CONSULTS** with officers and chairs before each meeting to ensure that details of the meeting are completed as planned;
- **REPRESENT** this PTA/PTSA at all council meetings or sends an alternate

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## Vice President(s)

If your bylaws list more than 1 vice president, their separate duties will be listed in Article VII. The vice president(s) should make a thorough study of the president's duties and responsibilities and be familiar with the work of the association.

### THE VICE PRESIDENT DOES THE FOLLOWING:

- **ACTS** as aide to the president
- **IN THEIR DESIGNATED ORDER** perform the duties of the president in the absence or inability of that officer to serve; and
- **PRESIDES** at meetings in the absence of the president or upon the president's inability to serve
- **PERFORMS** any other specific duties that may be provided for in the bylaws
- **REPRESENTS** the president when requested
- **PERFORMS OTHER DUTIES AS ASSIGNED BY THE BYLAWS.**

## Why no co-president's?

"Sharing the work load" is a legitimate concern among PTA leaders. There are parliamentary options available to help alleviate this concern. Co-presidents are not one of those options as Maryland PTA does not recognize or accepts co-officers.

### **Why NO Co's.....**

There are legal as well as parliamentary problems that exist when a unit installs co-presidents. For example: Who casts the deciding vote when there is a tie vote? Robert's Rules of Order Newly Revised says that it is the presiding officer's responsibility to cast the deciding vote when there is a tie.

In terms of legal contracts, which co-president would sign such contracts? Accountability for the actions of the PTA is important, both for the members and for the others with whom we work.

It can be complex to divide the tasks and can lead to conflict between the two people and within the PTA.

What happens if one of the "co's" does something wrong? Can the other "co" be held responsible?

**ONE SOLUTION IS THE VICE-PRESIDENT:** Presidents and vice president can act in as "co-leaders". These individuals are elected officials of the unit who have the same fiduciary responsibilities as the other officers. And if there are more than one VP, then the bylaws give each VP additional duties. By assigning the VP's additional duties, this will help "share the work load" of the President. Traditionally, Vice-Presidents are seen as "Presidents in training" and assigning additional duties will only further prepare them to succeed in the President's office.

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## SECRETARY

If the unit's bylaws stipulate more than 1 secretary, their separate duties are written in Article VIII.

The secretary is responsible for keeping accurate records of the proceedings of the association.

### **The secretary does the following:**

- **RECORDS** the minutes of all meetings of the board of directors, executive committee and general membership;
- **READS OR DISTRIBUTES** printed copies of the minutes of any previous meeting;
- **FILE** all records;
- **HAVE ON HAND** at each meeting a copy of the bylaws and standing rules; the agenda; the minutes of previous meetings, including treasurer's reports; a list of committees, including names of members of committees; ;
- **IN CONSULTATION** with and at the request of the president, may prepare in advance of each meeting a complete agenda, showing the order in which business should come before the group
- **COUNTS** a rising vote when requested by the presiding officer
- **ACTS** as custodian of all records, except those specifically assigned to others, and promptly delivers all records to successor
- **MAINTAINS** a current membership list
- **FURNISHES** delegates with credentials for voting at convention
- **PERFORMS** such other duties as may be prescribed in these bylaws or assigned by this local PTA/PTSA or by the board of directors

### **THE MINUTES ARE TO BE:**

- Be brief and concise
- Include the exact wording of every motion; *the name of the member who introduced the motion and the actions taken on the motion. The maker of a motion should be asked to put it in writing if the motion is long or involved.*
- The action taken by the association, not what is said by the members, should be recorded.
- After the motion, the words "approved" or "approved as corrected" and the date of approval should be written at the end of the minutes of each meeting.
- The minutes should be entered in an official minutes book and the pages numbered.

### **SUGGESTED OUTLINE FOR MINUTES**

- Type of meeting - regular, special, annual or adjourned
- Full Name of PTA
- Date, place, and time of meeting
- President or presiding chair name
- The attendance count to establish a quorum
- The minutes of the previous meeting – approved or accepted with amendments
- Report of the treasurer
- Reading of communications
- Reports of officers, executive committee/board of directors, standing/special committees
- All motions (except those withdrawn); and the name of each members who introduced a motion, but not the name of the seconded
- Program topic, method of presentation, names of participants and important points covered
- Time of adjournment
- Secretary signature

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## CORRESPONDING SECRETARY

If the bylaws provides for 2 secretaries, the corresponding secretary does the following duties:

- **CONDUCTS** the correspondence of the PTA/PTSA
- **SENDS** out notices of executive committee/board of directors, and other meetings
- **ANY OTHER DUTIES** as assigned in either the bylaws or by the board of directors. (*suggested duties, newsletter editor, Public Relations, other communication*)

## TREASURER

The treasurer is the legally responsible, authorized custodian, elected by the members, to have charge of the funds of the PTA.

The treasurer and all the board of directors have a fiduciary responsibility to ensure that the PTA is:

1. maintaining proper financial records
2. depositing money in a timely manner
3. adhering to the budget
4. complying with all legal and reporting functions
5. All bills are to be paid by check, never by cash
6. Two officers **MUST** sign every check

## **THE TREASURER SHALL:**

1. **READ** and become familiar with the National PTA Money Matters Quick Reference Guide, MD PTA Cash Encounters and the local, state, and National PTA Bylaws;
2. **HAVE** custody of all funds of the local PTA/PTSA held in a PTA bank account;
3. **KEEP** a full and accurate account of receipts and expenditures including reconciliation of the bank statement each month (and the president reviews and initials each bank statement);
4. **MAKE** disbursements as authorized by the president or board of directors of this local PTA/PTSA in accordance with the budget adopted by the local PTA/PTSA membership;
5. **PRESENT** a written financial report at every meeting of the executive committee, board of directors, the general membership, and at other times when requested by the board of directors;
6. **MAKE** a full report before the newly elected officers officially assume their duties;
7. **BE RESPONSIBLE** for the maintenance of such books of account and records as to conform to the requirements of Article IV, Section 14 of the PTA/PTSA bylaws;
8. **ALL** checks must be sign with two officer's signatures;
9. **TAX FORMS** – be responsible for preparing and filing all necessary tax forms and submitting a copy to MD PTA within thirty days of filing;
10. **FISCAL YEAR** – July 1 – June 30 - have the accounts examined at the close of the fiscal year (June 30) and upon change of treasurer by an auditor or an auditing committee of not less than three persons who, satisfied that the treasurer's annual report is correct, shall sign a statement of that fact at the end of the report. An auditor or an auditing committee shall be selected by the board of directors at least thirty days before the new officers assume their duties.
11. **SUBMIT** a copy of its annual financial review to MD PTA within 120 days following the local fiscal year (*fiscal year ends June 30 so send by Oct. 30*);
12. **FORWARDS** to the MD PTA treasurer all money that belongs to MD PTA and the National PTA; each remittance should be accompanied by the invoice form showing the number of memberships sold each month.
13. **COOPERATES** with the membership chair and the secretary in keeping an accurate list of PTA members
14. **DELIVERS** to successor, unless the association has otherwise ordered, all books, papers, and correspondence pertaining to the office of treasurer; including the audited books, approved and paid bills, canceled checks, plans, and procedures
15. **PERFORMS** such other duties as may be prescribed in the bylaws or assigned by the local PTA/PTSA or by the board of directors

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## **PTA COUNCIL DELEGATE**

- Each PTA has 2 delegates to the PTA Council of Howard County. (*bylaws Article XII*)
- The 2 delegates are members of the PTA's Board of Directors. (*bylaws Article VIII section 2*)
- Attend every meeting of their PTA and Council
- Take notes at Council meeting and give a full report to their PTA board of directors
- Be familiar with bylaws, standing rules, policies, and procedures at local, council, state, and national PTA
- Bring before Council any concerns or action items from the local unit, which the delegate is directed to introduce
- Report to the council their unit's decision on matters referred to it for approval or information
- Share information on unit activities, programs, and publications with other PTA units
- Encourage unit members to attend council programs and support council projects
- Use PTA Council meetings to become acquainted with delegates of other schools.
- Affiliate with a Council Committee, represent the Council on an HCPSS Advisory/Policy Committee, and/or act as a liaison to a community group that has requested PTACHC representation.

Other duties for any officer may be given at the discretion of the board of directors as needed and recorded in the minutes of the board of directors meeting