

Local Unit Officers Position Descriptions

PTA PRESIDENT

In accordance with 2008-2009 Local Unit Resource Guide

The President is elected by the association to lead the unit and to represent its members.

- Knows and follows the bylaws of the association
- Appoints chairmen and standing committees according to the bylaws
- Develops and updates Procedure Books
- Consults with the school principal on all matters relating to the school
- Invites teachers to participate as active members and chairmen
- Presides at all meetings of the general membership and the executive board and
- expedites those meetings by:
 - preparing an agenda
 - opening and closing meetings on time
 - working with officers and chairmen before meeting to learn who has
 - special reports or additions to the agenda
- Attends or is representative to:
 - council meetings
 - district meetings
 - workshops and clinics
 - PTA conventions
 - leadership conferences
 - other related meetings
- Completes all required reports and forms and returns them to the state office by designated deadline
- Is an ex-officio member of all committees **except** the nominating committee

A SUCCESSFUL PRESIDENT

- Creates an environment of mutual respect in which everyone feels free to participate fully in discussing issues and making decisions
- Remains impartial as the presiding officer, expressing no personal opinions
- Puts the goals of the organization first
- Actively seeks and makes use of the special interests and abilities of members
- Delegates responsibility and gives those delegated the opportunity to do the job
- Expresses appreciation for all effort, regardless of how successful it has been

References/Resources:

National PTA Quick-Reference Guides
National PTA Magazine *Our Children*
Robert's Rules of Order, Newly Revised
Virginia PTA Local Unit Resource Guide
Virginia PTA Bylaws
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Virginia PTA *Bulletin*

PRESIDENT-ELECT

(If designated in unit bylaws)

In accordance with 2008-2009 Local Unit Resource Guide

The organizational structure of Virginia PTA uses the office of president-elect. In an election year, delegates to our state convention elect a president-elect, vice president, secretary and treasurer. The office of president is automatically filled by the individual elected two years prior as president-elect.

An advantage to using the president-elect structure is that it allows that officeholder to concentrate on gaining experience in the responsibilities of president. The president-elect has the ability to plan ahead for his or her term in office and by working with the current president, provide continuity of leadership to meet the adopted goals of the association.

The duties of the office of president-elect include the following:

- Work by direction of and in cooperation with the president and fulfill such other duties as may be assigned by the president.
- Perform the duties and exercise the powers of the president in the absence or inability of that officer to serve.

It is important to the success of the association that the president-elect:

- Communicates regularly with the president in governing the association.
- Supports the president in guiding the organization to achieve outcomes defined by the strategic plan of the association.
- Knows and follows the bylaws of the association.
- Undertakes the necessary leadership development to fulfill the role of president.
- Fulfills other specific responsibilities as designated by the association, president, or executive board.

Local units and councils can adopt the president-elect structure to ensure continuity of leadership in the association. With the new structure, responsibilities of vice presidents in the unit or council will change. For example, the president-elect would assume the responsibilities of the office of president when the president is unable to fulfill such responsibilities or vacates the office. There are other bylaws amendments that must be adopted to properly institute the office of president-elect. If you are interested in reviewing this structure for your local unit or council, please contact the state Bylaws Committee chairman.

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VICE PRESIDENT

In accordance with 2008-2009 Local Unit Resource Guide

The vice president may be called upon at any time to temporarily assume the duties of the president (except when the president-elect structure is being utilized). A strong vice president can and should be the president's "right hand", acting as an aide and assuming assigned responsibilities.

The vice president represents the president upon request. In the event of the president's resignation, the vice president assumes the president's duties (except when the president-elect structure is utilized) until the position is filled in accordance with the local unit bylaws. When local units have more than one vice president, each vice president is designated specific duties such as vice president for education or vice president for legislation. Vice presidents often serve as program chairmen, coordinators of major projects that involve several committees and as a liaison to outside groups that may desire a connection with a local unit. In the case of multiple vice presidents, it is helpful if each vice president is assigned oversight of committees that have connecting areas of responsibility. Vice presidents can be especially helpful in strengthening communication within the executive board as well as within the general membership and other entities in the school system and community.

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SECRETARY

In accordance with 2008-2009 Local Unit Resource Guide

Some local units elect two secretaries. One secretary is called the **corresponding** secretary and the other is called a **recording** secretary. Local units determine responsibilities each secretary will have when there are two. Promptness, accuracy, and knowledge of the PTA are valuable assets.

THE RECORDING SECRETARY

Records all business transacted at each meeting of the executive board and of the general membership and presents the minutes for approval at the next meeting.

When taking minutes, remember:

- Minutes contain a record of each action taken by the group, including the exact wording of every motion, the name of the member who introduced the motion, and the actions taken on the motion. The secretary may request the maker of the motion to put it in writing.
- The minutes should be as brief as possible and should be reported in the order in which business was presented at the meeting. Record what is done by the group, **not** what is said by the members
- The minutes should be kept in an official minutes book with numbered pages.
- The word "approved" and the date of approval should be written at the end of the minutes of each meeting; additionally, the minutes should be signed by the secretary.
- Prepares, in advance of each meeting (in consultation with the president) a complete agenda showing the order in which business should come before the meeting.
- Has on hand for reference at each meeting a copy of the local unit bylaws, the standing rules, the agenda, the minutes of previous meetings, treasurer's reports, a list of committees including names of their members, and the membership list.
- Serves as custodian of all records except for those specifically assigned to other individuals.

The secretary may also call the meeting to order in the absence of the president and vice president, count a rising vote when requested to do so, furnish delegates with credentials, send out meeting notices and submit to the state office the names and addresses of the officers.

THE CORRESPONDING SECRETARY

Prepares all correspondence and maintains a correspondence file.

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TREASURER

In accordance with 2008-2009 Local Unit Resource Guide

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

REQUIREMENTS OF THE TREASURER

- Be sure that the books have been audited before accepting them.
- An audit should be conducted immediately following the end of a term of office. This may or may not be the same as the fiscal year. An audit at the end of fiscal year is required in bylaws and also required by Virginia Code. An audit checklist is provided in the forms section of this guide to assist your unit in preparing for your audit.
- Check to see that the new treasurer and two other officers (president and secretary or other officer) are authorized with the bank to sign checks. Always have two signatures on every check.
- Obtain liability and bonding insurance for the unit.
- Work with the budget committee to develop a budget for the coming PTA year.

MAINTAIN FINANCIAL CONTROL

- Maintain an accounting system with an accurate record of the expense and receipt transactions of the unit. Keep records up to date.
- Keep canceled checks, paid bills, receipts, and bank statements for annual audit.
- Always obtain a receipt for every invoice, purchase, other payment made by the PTA.
- Always register every check in the checkbook at the time it is written and remember to write on the check and the check stub the reason that the check was written.
- **NEVER SIGN A BLANK CHECK.**
- **NEVER PAY WITH CASH.** Checks provide a record of transactions.
- Always deposit all monies received in the PTA account immediately. Never leave money in the school or in someone's home. Most banks will provide non-profit organizations with access to the night depository without charge.
- Never deposit any PTA money in anyone's personal account or in the school building account.
- PTA funds must be kept separate from school funds. School funds are public monies. PTA funds are private monies. Checks should not be written to the school or the principal unless it is for a budget item or purchase. (Be sure you receive a receipt for any checks written to the school or the principal.) This is to protect the school, the PTA and you.
- Write checks only for items in the budget. Any change in the budget, or purchase of major items not in the budget, must have the approval of the general membership at a regular or specially called meeting.

References: Section IV, Financial Management, Virginia PTA 2008-09 Local Unit Resource Guide, National PTA Money Matters, and www.irs.gov for non-profits