

## PTA Secretary

Welcome to your new role of PTA Secretary! As Secretary, you will serve your PTA by keeping an accurate record of meetings, which become part of the permanent history of your PTA.

The Secretary of a PTA is also responsible for maintaining all PTA correspondence, including communications with members and notifications for meetings. Because of this, sometimes this position is split into two roles: **Recording Secretary** and **Corresponding Secretary**.

Great secretaries often have prior volunteer experience and/or meeting experience and are enthusiastic about PTA.

### A PTA Secretary's Responsibilities

#### 1. Gather and Maintain Essential Documentation

There are several items you will want right away to ensure important records aren't lost in the transition. Collaborate with your PTA President and past officers to gather these records. If any records are missing, contact Council for guidance.

Records to gather include:

- **Your PTA Bylaws** (and any Policies & Procedures) to find important information about your role and the rules and guidelines of your PTA.
- **PTA Procedure Book or Binder**. An organized binder with the previous year's documents should get you up to speed on what has happened in the past.

#### 2. Organize and Record Meetings

Meetings are made efficient by providing written communication with your PTA members and board. These responsibilities include:

- Working with the President to create an agenda.
- Sending out meeting announcements, agendas, and supporting documents.

- Taking attendance of **ALL persons present** (including virtual attendees) and checking for **quorum** during voting. Quorum is the minimum number of members who must be present to conduct business at a meeting. **Check your bylaws for your quorum number.**
- Taking minutes, including counting, and recording any votes. This also includes noting motions. \*Keep in mind that only members of your PTA/PTSA are able to vote on any business. You may want to have a membership list on hand to make sure only current members are voting.\*
- Presenting the minutes of the previous meeting, making any corrections, and ensuring approved minutes are included in your PTA's permanent record.
- Approved meeting minutes should be uploaded into MemberHub in your Files as well as the agenda. They should also be shared with your membership.

### 3. Other Information of Importance

- In the case of an absence of the Recording Secretary, the Corresponding Secretary should be ready to step in and record the meeting minutes. If your unit does not have a Corresponding Secretary position, another board member can volunteer to take the minutes.
- It is important to note that the person taking minutes in place of an absent Secretary **must also** be the one to type up those minutes.
- All recorded minutes should be organized by month and kept in a binder for each year. **All meeting minutes of current and previous years MUST BE kept indefinitely and MUST BE stored physically and made available when needed. Your minutes should also be uploaded into MemberHub in your unit's Files. This will be your digital storage.** You should know where your past year's minutes are stored.
- Digital storage of meeting minutes and meeting agendas alone **IS NOT** accepted. Should a USB be lost or MemberHub is no longer available to PTA's **OR** if there is a MH data issue, you will have no record of your business **WHICH IS MANDATORY**. So please be sure to have a physical Secretary binder for each year.
- Each set of recorded minutes should be signed by the Recording Secretary or by the person who recorded the minutes in a Secretary's absence. It's as easy as adding a footer to your minutes saying, "Respectfully submitted by \_\_\_\_\_."