



Hauser PTO Executive Board Position Descriptions

PRESIDENT

Job Description:

- Preside at General Membership and Executive Board meetings
- Serve as the primary contact to the principal and represent the PTO at meetings of other groups, if needed
- Guide and keep PTO Board Officers and Chairpersons on task

Typical Monthly Responsibilities:

- Prepare agenda for and attend General Membership and Executive Board Meetings
- Attend and/or assign a representative to attend monthly District PLT (Parent Leadership Team) meetings and communicate information to general membership
- Invite chairpersons to PTO meetings to present event and program information.
- Review the treasurer's report
- Have regular check-in meetings with the principal

Typical Annual Responsibilities:

- Finalize the activities calendar with the principal
- Set the schedule of monthly general membership and executive board meetings for the year
- Update the signature cards at the PTO's bank
- Double-check key organizational dates, including PTO insurance policy renewal, incorporation with the state, and IRS Form
- Determine which officer positions might need to be filled next year and reach out for volunteers with help of Parliamentarian and current officers
- Determine which committee chair positions of large scale events/fundraisers (Plant Sale, Food Drive, Staff Appreciation) might need to be filled next year and reach out for volunteers to shadow current chairpersons with help of Second Vice President and current officers.

Training and Resources:

- One-on-one with outgoing president
- Past files and examples

PARLIAMENTARIAN

Job Description:

- Knowledge and understanding of the organization's governing documents
- Maintains copies of current governing documents - bylaws, standing rules, policies and parliamentary authority.
- Provides guidance to members and board members on issues outlined in governing documents and on parliamentary procedure
- Ensure that proper procedures are followed

Typical Monthly Responsibilities:

- Attend General Membership and Executive Board Meetings

Typical Annual Responsibilities

- Chairs Bylaws committee to review Bylaws each year and revise every two years
- Chairs Standing Rules committee to review Standing Rules each year and revise every two years
- Ensure the nominating process is being conducted. Form the Nominating Committee and remain available to assist the committee at their request.

Training and Resources:

- One-on-one with outgoing parliamentarian
- Past files and examples

TREASURER

Job Description:

- Helps develop the budget, collects fundraising money, writes checks for purchases and reimbursements, tracks income and spending, makes financial reports, and organizes the books for annual audit
- Must be comfortable using a computer. Must know how to use QuickBooks and Excel
- Understands that this role is the custodian of other peoples' money

Typical Monthly Responsibilities:

- Attend General Membership and Executive Board Meetings
- Create monthly PTO treasurer reports via QuickBooks software (transaction report, performance to budget report) and present reports at monthly PTO meetings or as requested
- Receive all monies of this organization and keep accurate record of receipts and expenditures
- Post financial transactions to our financial system as they occur throughout month

- Reconcile checkbook
- Pay out funds in accordance with the budget as approved by the membership and authorized properly (two signatures and proper paperwork required)
- Document and make deposits in a timely fashion, as needed
- Preserve financial records, including invoices and control forms

Typical Annual Responsibilities:

- Lead annual budget development process in August using the QuickBooks software
- Present budget for approval at August PTO meeting
- Be responsible for completion and filing of appropriate forms as may be required by IRS regulations
- Renew incorporation with the state
- Provide the checkbook, all bank statements, canceled and voided checks, deposit slips, treasurer's record book and receipt book, check requests and invoices for all disbursements to the audit committee by July 1st

Training and Resources:

- One-on-one with outgoing treasurer
- Past files and examples

SECRETARY

Job Description:

- Record and distribute minutes of executive board meetings and general meetings

Typical Monthly Responsibilities:

- Attend General Membership and Executive Board Meetings
- Record minutes of executive board meetings
- Record minutes of general meetings and send to First Vice President for distribution to general membership in a timely manner

Typical Annual Responsibilities:

- Prepare notes of thanks, sympathy, etc. as needed on behalf of the PTO and with approval of the executive board

Training and Resources:

- One-on-one with outgoing secretary
- Past files and examples

FIRST VICE PRESIDENT – Communication

Job Description:

- Manage communications for the PTO, including: weekly PTO newsletter, email correspondence, maintain website
- Create and manage online forms/collections, as needed
- Must be comfortable using the computer.

Typical Monthly Responsibilities:

- Attend General Membership and Executive Board Meetings
- Produce a weekly newsletter during the school year
- Monitor and maintain the organization's email account and respond to correspondence in a timely manner
- Create and manage online volunteer sign ups, collections, and forms for PTO events and programs, as needed
- Maintain the organization's website, ensuring information is up to date and relevant

Typical Annual Responsibilities:

- Determine, with executive board, the most appropriate methods and frequency of communicating with members
- Update general information, documents, officers/chairs on the organization's website
- Maintain PTO files on organization's Google Drive
- Update (with approved information from school) and distribute access to an online school directory (excel spreadsheet)

Training and Resources:

- One-on-one with outgoing first vice president
- Past files and training manual

SECOND VICE PRESIDENT – Member Services

Job Description:

- Recruit, assign, and coordinate chairpersons with assistance (if needed) of Board.
- Help guide/oversee committee chairs.

Typical Monthly Responsibilities:

- Attend General Membership and Executive Board Meetings
- Provide chairperson updates during meetings

- Check-in with chairpersons to provide support, as needed

Typical Annual Responsibilities:

- Determine which committee chair positions of large scale events/fundraisers (Plant Sale, Food Drive, Staff Appreciation) might need to be filled next year and reach out for volunteers to shadow current chairpersons with help of President and current officers.

Training and Resources:

- One-on-one with outgoing second vice president
- Past files and examples

THIRD VICE PRESIDENT – Fundraising

Job Description:

- Works with board to plan and organize PTO fundraising activities
- Works with board to plan and organize non-fundraising activities/events to grow family engagement
- Help guide/oversee fundraising committee chairs

Typical Monthly Responsibilities:

- Attend General Membership and Executive Board Meetings
- Present reports on current and proposed fundraising activities at board and general membership meetings

Typical Annual Responsibilities:

- Work with board to assess past fundraisers and what might be changed or improved on in the future
- Research new ideas and make suggestions to the Board for new fundraising events and programs, if needed

Training and Resources:

- One-on-one with outgoing third vice president
- Past files and examples