

Morning Creek PTA Job Responsibilities (Officers)

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Morning Creek PTA Executive Board

Officer Job Descriptions

Executive Vice President

The primary responsibility of the executive vice president is to assist the president and help lead the PTA toward specific goals chosen by its members. The goals must be consistent with the policies and purposes of the PTA. This position can be used to gain understanding of the requirements and duties of the president position, but it is not a president-elect position.

The Executive Vice President should:

- 1) Serve as the primary aide to the president
- 2) Perform the duties of the president in the absence or disability of that officer to act
- 3) Attend PTA sponsored workshops or trainings
- 4) Become familiar with the duties of each chairman
- 5) Attend meetings as requested by the president (preparing and presenting a report to the executive board for each meeting attended on behalf of the president)
- 6) Attend council, district and state PTA meetings as appropriate
- 7) Provide guidance on CA State PTA policies and procedures and therefore, should become knowledgeable of the following resources:
 - i) *California State PTA Toolkit*
 - ii) Unit PTA bylaws
 - iii) *Insurance and Loss Prevention Guide*
 - iv) California State PTA website: www.capta.org
- 8) Inform PTA board of new and updated PTA materials and information
- 9) Oversee Honorary Service Award committee
- 10) Safeguard the financial assets of the PTA by strictly adhering to PTA financial procedures as outlined in the bylaws and state and national PTA guidelines
- 11) Protect members' privacy by utilizing member information for PTA work only
- 12) Help facilitate smooth transitions with incoming officers and committee chairs
- 13) Gather and distribute procedure books to chairmen at beginning/end of their terms
- 14) Contact president for assistance with issues, concerns, questions or procedural advice
- 15) Maintain (and turn over) an Executive Vice President procedure book (see 'Creating and Keeping a Procedure Book')

Morning Creek PTA Executive Board

Officer Job Descriptions

1st Vice President of Membership

PTA is a membership association, and membership is the heart of PTA. It is crucial to the health and success of Morning Creek's PTA that our membership is representative of our school community. The Vice President of Membership, along with the president, directs the membership committee in a successful and yearlong membership campaign.

NOTE: Please review the CAPTA *Job Description for Membership Chairman/Vice President* for additional rules and regulations regarding membership.

The VP of Membership should:

- 1) Make membership growth and retention a priority of the PTA
- 2) Establish membership goals
- 3) Work with membership committee, president, and entire executive board to decide on a membership campaign theme
- 4) Create a marketing plan that promotes our PTA's successes and the work of the PTA so that new members will be informed and attracted to join, and current members will be motivated to renew their membership. All fliers must be pre-approved by president and principal
- 5) Help recruit committee members to assist in the planning and execution of the membership campaign
- 6) Develop an outreach component within the campaign for underrepresented groups
- 7) Create a timeline for membership campaign activities
- 8) Collect and reconcile membership dues with treasurer
- 9) Oversee the creation and upkeep of the membership database by the membership committee person assigned to that role
- 10) Assist with the distribution of membership cards, as necessary
- 11) Hold regular planning meetings with membership committee and other board members
- 12) Work with Volunteer Coordinator to recruit volunteers as needed
- 13) Know your budget, save your receipts and submit them to treasurer with a Payment Authorization Form for reimbursement
- 14) Familiarize yourself with the Morning Creek PTA's unit Bylaws
- 15) Maintain (and turn over) a Vice President of Membership procedure book (see 'Creating and Keeping a Procedure Book')
- 16) Update Website Chair and Newsletter Editor with upcoming events and dates
- 17) Attend monthly board meetings and provide regular membership reports (or send report via email)
- 18) Track your volunteer hours spent on program and submit at least monthly (before end of month) via PTO Manager

Morning Creek PTA Executive Board

Officer Job Descriptions

2nd Vice President of Ways & Means

Various chairpersons and committees carry out PTA fundraising activities. The VP of Ways & Means works with these volunteers to ensure that yearly goals are being met or adjusted as necessary. The fundraisers that the VP of Programs oversees are **After School Enrichment, Book Fairs, Box Tops, Restaurant Nights, Spirit Wear, School Supplies, Community Contributions, Picture Days, and Art Show**. The VP of Ways & Means is also responsible (with a committee) for selecting, planning and executing our main source of income – the fall fundraiser and/or spring fundraiser. The VP of Ways & Means also sits on the Budget Committee, along with the President, EVP, Treasurer, and VP of Programs. The Fundraising Committee is selected and appointed by the VP of Ways & Means and the President.

PTA funds are raised and used for purposes approved by the association in advance of any fundraising event. No contract may be signed nor expense incurred without advance association approval of the event.

NOTE: Please review the CAPTA *Job Description for Fundraising Chairman* for additional rules and regulations regarding fundraising.

The Vice President of Ways & Means should also:

- 1) Work with the Budget Committee to develop fundraising goals
- 2) Seek out new fundraising ideas and evaluate all proposed activities to ensure that they will
 - a) comply with all laws, school regulations, health and safety requirements
 - b) be inexpensive, involve many members and be fun
 - c) respect religious and ethnic groups in the community
 - d) not exploit children
 - e) not burden school staff
 - f) not compete with nor detract from the school lunch and nutrition program
 - g) not involve commercial or advertising obligations
 - h) not conflict with other PTA, school or community events
 - i) create goodwill for PTA in the community
- 3) Select the members of the Fundraising Committee (to be appointed by the President) to evaluate, select and execute the fall/spring fundraisers
- 4) Attend workshops and conferences to help evaluate fundraising options
- 5) Hold meetings early in the PTA year with each fundraising chairperson for pre-planning before presenting recommendations to the executive board and association
- 6) Ensure that all flyers and other communication are approved by the president and principal

- 7) Hold regular planning meetings with individual committee chairs to provide guidance and support
- 8) Maintain planning budget spreadsheet to ensure income and expense projections are on course throughout the year
- 9) Participate in budget committee meetings, providing input from budget planning worksheets
- 10) Familiarize yourself with the Morning Creek PTA's unit Bylaws
- 11) Maintain (and turn over) a Vice President of Ways & Means procedure book (see 'Creating and Keeping a Procedure Book')
- 12) Attend monthly board meetings (or send report via email)
- 13) Track your volunteer hours spent on program off-campus and submit at least monthly (before end of month) via PTO Manager

Morning Creek PTA Executive Board

Officer Job Descriptions

3rd Vice President of Programs

The Vice President of Programs works with a committee and with other chairmen to plan the year's PTA programs, which may include family events, parent education, school-wide assemblies and special events. The program committee is appointed by the president-elect, early in the term, and may include the president (ex-officio), executive vice president, principal, teacher liaison, and others.

NOTE: Please review the CAPTA *Job Description for Program Chairman* for additional rules and regulations regarding program planning.

The Vice President of Programs should:

- 1) Collect and review program booklets and evaluations of previous programs, results of parent surveys, program materials from CA State PTA convention, council and district PTA information, lists of speakers and community resources, etc.
- 2) Chair the Programs Committee, and work with it to determine goals for the year, prioritizing the most vital concerns of the PTA members, school and community, and focus program planning on those, selecting a theme if desired. Brainstorm for ideas, selecting events that appeal to a wide range of families
- 3) Help develop a school-term calendar of programs to be presented to the association for adoption. After approval, distribute the schedule via PTA newsletter and website
- 4) Ensure every program/event meets PTA insurance requirements. See *Insurance and Loss Prevention Guide* for allowable, discouraged and prohibited activities
- 5) When implementing a new program or event, form a special committee (to be disbanded upon completion of the program or event), seeking experienced as well as new members, and divide responsibilities. Share in decision-making and implementation tasks
- 6) Be responsible for opening and updating Facilities Use Requests as needed
- 7) Maintain good communication with all program chairs, making sure they are on track and providing guidance where necessary
- 8) Request advance funds if necessary, or be prepared with a PTA check for approved amount to be presented at completion of program or event
- 9) Contact vendors and follow up with written confirmation, including request for information (biography for introduction purposes, equipment or facilities needs, etc)
- 10) Ensure programs/events are publicized well in advance. All fliers and other communications must be pre-approved by principal and president

- 11) Review presented programs with the committee during the year, make recommendations for future planning groups, decide what worked or did not work, and report as necessary to the executive board and association
- 12) Update the procedure book: list successes and failures, ideas for future programs, copies of correspondence, program resources and references
- 13) Familiarize yourself with the Morning Creek PTA's unit Bylaws
- 14) Maintain (and turn over) Vice President of Programs procedure book (see 'Creating and Keeping a Procedure Book')
- 15) Update Website Chair with upcoming events and dates
- 16) Attend monthly board meetings to give committee reports (or send report via email)

Morning Creek PTA Executive Board
Officer Job Descriptions

Historian

The primary responsibility of Historian is to collect and report our volunteer hours. Volunteer hours are collected and reported to maintain PTA's federal tax exemption status. As a non-profit 501 (c) (3) organization, PTA must receive 1/3 (one-third) of its support from the general public. The recorded hours from volunteers are proof of this. The other responsibility is to showcase our PTA history, by taking (or collecting) photos at PTA events (to be compiled in a photo book at the end of the year), and keeping our social media postings up to date.

NOTE: Please review the CAPTA *Job Description for Historian* for additional information regarding Historian.

The Historian should:

- 1) Capture, assemble and preserve a record of activities and achievements of our PTA
- 2) Collect volunteer hours and submit to Council Historian as required
- 3) Complete and submit the PTA Unit-Annual Historian Report to council/district PTA
- 4) Fill out Historian Summary Report and file copies as Historian records, which, like minutes, are kept forever
- 5) Create a photo book with an overview of our PTA year and displays or presents at meetings/events near end of school year
- 6) Compile volunteer photos and create a slideshow for Volunteer Tea, held in early June
- 7) Add PTA history to social media postings
- 8) Maintain (and turn over) a Historian Procedure Book (see 'Creating and Keeping a Procedure Book')
- 9) Familiarize yourself with the Morning Creek PTA's unit Bylaws
- 10) Update Website Chair with upcoming events and dates
- 11) Attend monthly board meetings to give Historian report (or send report via email)
- 12) Attend council/district PTA workshops for historians
- 13) Contact council/district PTA historian for assistance, as needed

Morning Creek PTA Executive Board
Officer Job Descriptions

Secretary

The recording secretary is elected by the association and is one of the three required officers for a PTA (along with president and treasurer).

NOTE: Please review the CAPTA *Job Description for Secretary* for additional information regarding this position.

The secretary should:

- 1) Attend PTA-sponsored workshops or trainings.
- 2) Obtain the secretary's record book, which contains the minutes from previous executive board and association meetings. Also obtain the procedure book which contains the master set of the bylaws, roster, list of programs, goals, calendar, list of fundraisers, member list and other official documents and records of the PTA.
- 3) Attend Board and Association meetings, keep an accurate, concise and permanent record of the proceedings. These minutes are the legal record of the PTA and the original copy is known as the master copy.
- 4) Prepare the minutes and give a copy to the president soon after each meeting.
- 5) Prepare a list of unfinished business items for the president and assist with the agenda if requested.
- 6) Prior to the meeting, prepare sign-in sheet and print a copy of the agenda (prepared by President).
- 7) Print minutes from previous meeting for approval by three board members at the meeting.
- 8) Have on hand for reference at each meeting a copy of the bylaws and standing rules, copies of agendas, motion forms, minutes of previous meetings, board/chair/committee roster and an up-to-date list of all members.
- 9) At the beginning of the meeting, announce that the minutes from the previous meeting (date) were approved as written (or with changes, if that's the case).
- 10) Adhere copies of the minutes, sign-in sheet, agenda, Treasurer's report, budget and anything else presented at the meeting, in the bound PTA log book. Permanent storage is in the PTA workroom.
- 11) Sign, along with the president, authorizations for payment after the association votes to pay a bill.
- 12) Check the PTA mailbox in the PTA workroom at least weekly and distribute accordingly.
- 13) Keep the annual Conflict of Interest forms on file.
- 14) Track your volunteer hours spent on program off-campus and submit at least monthly (before end of month) via PTO Manager.

Morning Creek PTA Executive Board

Officer Job Descriptions

Treasurer

The Treasurer is an elected officer and the authorized custodian of all funds of the PTA. The Treasurer's duties also include keeping records and preparing reports to comply with local, state and federal laws.

The Treasurer will:

- 1) With input from the Executive Board, create and maintain an annual budget
- 2) Monitor budget throughout the year, calling meetings of the Budget Committee as needed
- 3) Attend PTA sponsored workshops or trainings
- 4) File new signature cards for PTA account at bank, and ensure that two signatures are required on all checks
- 5) Write checks for reimbursements and bills
- 6) Maintain all financial information in Quicken
- 7) Keep treasurer's book and checkbook up to date
- 8) Prepare and perform deposits
- 9) Prepare financial reports for all Board and Association/Membership meetings
- 10) Reconcile monthly bank statements
- 11) Gather information to be provided to the accountants for yearly tax preparation
- 12) Submit proper information to the district PTA – taxes, insurance payments, etc.
- 13) Prepare and submit proper financial forms for contracted employees
- 14) Prepare an annual financial report
- 15) Attend meetings as requested by the president