AJ PTSA 2016/2017 Executive Board Job Description

This is a general job description. Specific duties may vary from year to year.

President

* The President of the PTSA is responsible for leading the PTSA toward specific goals chosen by its members.
* The President is the presiding officer and official representative of the local unit.
* The President plans the meeting agenda ahead of time, with input from others.
* The President must maintain impartiality when serving as the presiding officer and be knowledgeable of basic parliamentary procedure, objectives of the PTSA, Washington State PTA uniform by-laws, unit standing rules, and be aware of and utilize PTA resources.
* The President has the responsibility to appoint positions and committees, with the approval of the Executive Committee. It is important for the President to delegate responsibility, empower others and appreciate their efforts.
* The President should communicate regularly with officers, chairs and membership.
* The President is responsible for overseeing and directing the membership chair.
* It is the responsibility of the President to ensure the unit’s participation in Council and State PTA elections.
* The President should maintain and model positive relationships with the principal and staff. Acts as a liaison to teachers. Introduce yourself to the school staff and principal. Ask about their plans for the year and tell them you are interested in helping them achieve their goals. Helping to find out their needs and wants, if any. Builds a relationship to help keep teachers involved in PTA in regards to membership and general meetings. Be aware of any staffing changes and send notice of the changes to the members.
* Keep an updated directory contact list of board members and key committee chairs and distribute as needed.
* The President needs to be aware of important deadlines, such as payment of membership service fees, registration for workshops and conferences, applications for awards and submittals for recommendations, as well as annual corporation reports, charitable solicitation registration and tax filings.
* Follow the changes in the school and district that affect the school. Advocate for issues that are requested by the board or parent group. Be prepared to speak at various school functions including New Student and Kindergarten Orientations, Open Houses, assemblies, and when requested by parent groups

**After election, but before taking office July 1**

* Shadow current President for their remaining term.
* If attending State PTA convention as a voting delegate, study materials in order to be a knowledgeable delegate.
* Request and review outgoing President’s procedure book and all other material received from previous President.
* Coordinate with Treasurer-elect to provide signature s (for signing authority) for bank accounts. These accounts need to be updated with new officers after July 1.
* Submit all newly elected officers contact information to Council and State PTA office.
* Review past activities, prioritize projects, establish mission and set goals, with the help of the executive board. and chairmen to make plans and goals for the year. He/She designs a master calendar with the help of the Vice-President, for the year of PTSA activities. It is recommended to meet with board before school ends and at late summer to review all areas of responsibility and formulate time tables. It might help to invite previous board to attend but not necessary. Evaluate current committee positions and decide which are needed. Ask for suggestions of people to fill committees.
* Participate in preparation of proposed interim budget for presentation and approval by Executive Committee and General Membership.
* Become knowledgeable of basic parliamentary procedure and familiar with objectives of the PTSA, Washington State Uniform By-laws, and PTSA Standing Rules.
* Start recruiting chairs and committee members, striving for a balance of experienced members and new members, keeping in mind that all areas of the community should be represented. To prioritize, first select those whose work begins during summer or immediately upon return to school.
* Become familiar with the job descriptions of each chair position. Share job descriptions and materials with chairs and help facilitate transition from his or her predecessor. Look ahead 3 months at a time and, if needed, helps to manage a schedule for each respective committee currently active for the 3-month period.

**During Term of Office Starting July 1**

* Review Standing Rules with Board of Directors, and revise as necessary for presentation to General Membership and subsequent vote. This can also be done in May before taking office officially.
* Maintains the PTSA email account throughout the year and forwards any email to respective committee chairs, etc.
* Works with Treasurer to make sure the PTSA has appropriate insurance for the organization and it is up to date (typically due in October/November).
* Find the most recent audit. You may need to talk to the Treasurer about this. If an audit did not occur after the latest transition of officers, make sure to get one done. You will want to start fresh with a new set of books, so be sure the previous set is closed out and audited.
* All nonprofits must file some type of Form 990 with the IRS each year. Be sure you know when a 990 was last filed and what you will be responsible for filing in the coming months. 990s are due on the 15th day of the fifth month following the end of a fiscal year. If you believe your unit missed one or more filings in the past few years, contact your state PTA immediately for assistance.
* The PTSA President meets with the principal at least once a month to discuss different ideas, usually starting in August. This involves coordinating a regular meeting with Principal for updates and communication. Meet with the Principal monthly or "as needed" to share information on current events/problems involving the school. Provide guidance to the Principal as to what issues might need addressing within the parent body.
* Prepare master calendar of meetings that includes General Membership meetings, Board of Director Meetings and Executive Committee meetings, PTSA special events and President/Principal meetings.
* Serve as the official representative/spokesperson of the association.
* Appoint, with board approval, chairs and members of any board approved committee or task force.
* Serve as an ex-officio member of all committees except the Nominating Committee and Audit Committee (since the President is a signatory on the bank account).
* Lead and facilitate the vision of the Board of Directors, and coordinate the work of the officers and committees so that the objectives/goals can be promoted and achieved.
* Work with communications board to do a monthly newsletter from the President
* Distribute and discuss materials sent from Washington State PTA with appropriate officers and chairs.
* All written materials produced by the PTSA must be cleared with the President, or another executive board member and Principal before publishing. The President is responsible for the accuracy of the PTSA information and compliance with PTSA policies.
* Model and maintain positive relationship and regular communication with Principal and staff, and encourage the board, chairs and members to do the same.
* Clear all PTSA events/activities that may happen at school during school hours or interfere with school activities with the Principal.
* Communicate regularly with the Board of Directors, chairs, membership and greater community.
* Be aware of and utilize PTA resources and leadership trainings.
* Encourage others on the board and chairs to also use these resources and attend trainings.
* Review and sign all legal documents and contracts (President is one of the two signatures needed).
* Attend and be a voting delegate to the Council. Council meets once a month, typically the second Tuesday.
* Ensure that the association participates in the election of the PTA Region Director.
* Receive and review a duplicate copy of the bank statement. For Bond Insurance, bank statements must also be reviewed regularly by someone without check-signing authority.
* Be aware of required deadlines: membership service fees, registration for workshops and conferences, applications for awards, and submittals for recommendation, the annual corporation report, charitable solicitations registration and tax filings.
* Ensure all officers, chairs and committee members are current PTSA members.
* Appoint Audit Committee.
* Facilitate the resolution of issues.
* Delegate responsibility to and empower members of the Board of Directors.
* Build an effective team by creating a climate of support and mutual respect.
* Demonstrate and embody the values of local/state/national PTSA.
* Promote the PTSA’s positive image within the community.
* Perform such other duties as may be prescribed in the by-laws or assigned by the PTSA, Board of Directors or the Executive Committee.
* In conjunction with all other board members, gather information, copy, prepare and distribute the Welcome packets.
* Participate in at least 5 PTA functions each school year.

**Preparation for Association Meetings**

* Plan meeting agenda, with input from others, with the Secretary.
* Preside at all meetings of the association, including Executive Committee, Board of Directors and General Membership meetings.
* Maintain impartiality when serving as presiding officer at meetings.
* Assign responsibility to Executive Committee members to make arrangements with Hospitality Chair regarding refreshments, if applicable.
* Working with the Secretary, publish a tentative agenda before all General
* Membership and Board of Directors meetings via website, newsletter/eNews, and bulletin board.
* Make sure a revised budget is approved at the first General Membership meeting, before implementation of any fall fundraisers and programs.
* Elect the Nominating Committee at the appropriate General Membership meeting.
* Provide the required notice and elect new Officers at the appropriate General Membership Meeting, usually March or April.

**End of Term**

* Ensure that the Board of Directors conducts an annual evaluation of its mission and goals, and of its own performance.
* Submit all newly elected officers’ contact information to Council and State PTA office.
* Facilitate the transition of (any) new board members at the end of the year. Encourage cooperation and sharing of materials and knowledge between outgoing and incoming board members.
* See that outstanding bills have been paid, projects completed and financial books are scheduled for audit. Be certain that all correspondence, including thank you notes and acknowledgments, have been sent.
* Acknowledge the Board of Directors.
* Continue responsibilities until new officers assume office.
* Stay involved and accessible, but not in charge.

Vice-President

The PTA Vice President(s) are responsible for supporting the President(s) and helping to provide leadership and direction to the organization. Responsibilities include:

* In conjunction with the President, Recruit chairpersons for all PTA committees.
* Monitor the progress of each committee and provide consultation regarding Board policies and procedures. Ensure familiarity with all accounting and reimbursement procedures.
* Execute and confirm all building use paperwork is completed prior to each event. Usually done all at once, after the PTSA calendar has been created.
* Collect all documentation pertaining to each event (flyers etc.) and compile for PTA files. This helps with the books to pass on to any successors.
* Review Committee Chair list each year and make changes as needed.
* Collect and prepare volunteer sign-up sheets for yearly committees and distribute to the committee chairs.
* Mail volunteer lists, budget, report forms and other pertinent information to each chairperson, working with the volunteer priority chair.
* Distribute returned Welcome packet information into correct boxes and files for each committee.
* Coordinate refreshments for PTSA General Meetings or any other PTSA sponsored meetings, if applicable.
* Coordinate childcare for PTSA General Meetings. In the past this has been done through the career center at Mountain View HS.
* Coordinate any Parent Enrichment Seminars for the PTSA General Meetings, if applicable.
* Preside over PTA Board and General Membership meetings in the absence of the President(s).
* Recruit a nominating committee for open Board positions in the spring.
* In conjunction with the Secretary, write thank you notes to committee chairs and volunteers after their events.
* In conjunction with all other board members, gather information, copy, prepare and distribute the Welcome packets.
* Participate in at least 5 PTA functions each school year.

Secretary

* The Secretary shall attend, take minutes and record all business conducted at every meeting of the Executive Committee, Board of Directors, and General Membership. General Meeting Minutes are to be made available to membership within 3 days of meeting and should be displayed on bulletin board or in the PTSA room.
* The Secretary’s job responsibilities include, but are not limited to, the following activities. The Secretary shall: Attend the Washington State PTA Convention, attend “PTA and the Law” and “For the Record” PTA Secretary classes, and follow the rules and regulations outlined in the publications, PTA and the Law and Secretary.
* Report to the President, serve as an active participant on the Executive Committee and Board of Directors, and attend PTSA board meetings with voice and vote.
* Work with the President to publish a tentative agenda before all General Membership and Board of Directors meetings via website, newsletter/Enews, membership email **or** bulletin board.
* At the Board of Directors and General Membership meetings, determine whether a quorum is present, handle attendance, and in the event that President and Vice Presidents are absent, call the meeting to order and ask for nominations for a chair pro-tem.
* Write Thank you notes for all donations of time and money made to AJ PTSA
* Update the Standing Rules and maintain a 3-ring binder containing the following:

•Standing Rules

•Mission Statement and Goals

•School Calendar

•Minutes

* In conjunction with all other board members, gather information, copy, prepare and distribute the Welcome packets.
* Participate in at least 5 PTA functions each school year.

Treasurer

* The Treasurer’s job responsibilities include, but are not limited to, the following activities. The Treasurer shall:

Report to the President, serve as an active participant on the Executive Committee and Board of Directors, and attend PTSA board meetings with voice and vote. Present to the General Membership at regularly scheduled and special meetings.

* Serve as chair of the Budget Committee and present the budget to the membership.
* Attend the Washington State PTA classes, “PTA and the Law” and “Money Matters,” and follow all rules and recommendations outlined in the publication, PTA and the Law.
* Must keep accurate and detailed accounts in the PTSA books and records of all funds received and all funds disbursed. The treasurer shall issue written receipts for all monies received. The Treasurer submits a written monthly financial report at each meeting of the PTSA (General Membership and Board of Directors). The Treasurer must provide all financial records if requested by the President or board members.
* Must preserve all vouchers, receipts, bank statements, canceled checks, and other records and, when requested, submit these to the financial review committee, to the Board of Directors or to membership. The Treasurer must maintain complete financial records as specified in the records retention timetable set forth by Washington State PTA.
* Must submit the books and records for financial review to a qualified accountant or a Financial Review Committee appointed by the President (Usually in February).
* Receive all PTSA funds and promptly deposit these funds into the PTSA’s bank account. The PTSA Treasurer handles only PTSA funds and does not deposit funds of other organizations or ASB funds into the PTSA account.
* Bills that are paid BY CHECK ONLY and signed by two authorized Executive Committee members. All of the PTSA’s financial obligations must be authorized by the Board of Directors or the membership.
* The Treasurer is responsible for coordinating the signature authority transfer on the PTSA bank accounts at the end of the fiscal year or as necessary.
* Read and understand all references to membership service fees and finances that can be found in the Uniform Bylaws, the PTSA’s standing rules and the Washington State PTA materials. The Treasurer should forward to the Washington State PTA – through the appropriate channels
  + the State PTA portion of the PTSA membership service fees, accompanied by the properly completed forms.
  + File all mandatory state and federal filings, including, but not limited to, IRS 990/990 EZ, Charitable Solicitations Forms, and the Incorporation Annual Report.
* Be responsible for obtaining and updating association insurance, usually due in October/November.
* The Treasurer delivers to her/his successor, all books and records, including historical records, promptly at the conclusion of her/his term of office.
* In conjunction with all other board members, gather information, copy, prepare and distribute the Welcome packets.
* Participate in at least 5 PTA functions each school year.