



## OFFICERS AND EXECUTIVE BOARD POSITIONS 2021-2022 SCHOOL YEAR

*Let's Make a Difference!*

### POSITIONS & TERMS

- President
- Vice President
- Secretary
- Media Manager
- Senior Treasurer
- Junior Treasurer/Spirit Wear Distributor
- (2) Fundraising Coordinators- Appointed Positions
- (2) School Liaisons
- Spirit Wear Coordinator- Appointed Position

Term of office for the President, Secretary, and Senior Treasurer shall be for one (1) year each.

Term of office for the Media Manager, Fundraising Coordinators and all representatives or chairs shall be for one (1) year each.

Term of office for the Vice President and Junior Treasurer/Spirit Wear Distributor shall be for two (2) years each.

Following the completion of the first year of their term of office, the following officers will assume the assigned roles with the newly elected board members, and serve accordingly for the second year of their term of office:

- Vice President shall assume the role of President
- Junior Treasurer shall assume the role of Senior Treasurer

## PRESIDENT

- Oversees all PTO operations
- Run general and board meetings
- Represent the PTO at meetings of other groups
- Support all board members as needed
- Retain all official records of the PTO
- Review the treasurer's report and check in with treasurers on a regular basis
- Have regular check-in meetings with the principals and super intendent
- Finalize the activities calendar with the principals, super intendent and school board
- Set the schedule of monthly executive board meetings for the year
- Double-check key organizational dates, including PTO insurance policy renewal, incorporation with the state, and IRS Form 990 or 990-EZ, if applicable. Collaborate with Treasurer and Jr Treasurer for follow through.
- Determine which officer and committee chair positions might need to be filled next year, and reach out for volunteers
- Prepare agendas for general and board meetings
- By-laws expert
- Make sure deadlines are met by board members
- Build community relationships
- Charity and community outreach
- Ensure that event recap sheets are being completed after each event.

## VICE PRESIDENT

- Support the president in overseeing all PTO operations
- Perform the duties of the president if the president is absent or unable to serve
- Participate in executive board meetings and provide input for decisions
- Aide event chairs with committees and attend committee meetings
- Participate in general meetings
- Familiarize yourself with Robert's Rules of Order
- Bylaws expert
- Oversees community surveys and gives feedback on results
- Maintains storage unit, PTO inventory list and check in/out spreadsheet
- Acquire volunteers.

## MEDIA MANAGER

- Support President and VP on communications for the PTO as needed
- Design all creative items needed for PTO events, social accounts, marketing, flyers, etc.
- Maintain all social media accounts
- Maintain PTO website, including spirit wear line updates.
- Manage all online marketing
- Ensure the USD 416 website, PTO website, and the schools' weekly announcements are updated and current with PTO information
- Photography at events
- Work under the direction of the President and Vice President while being responsible for social media, reaching out to local newspapers, making PTO videos and over all PTO marketing and hype.

## SENIOR TREASURER

- Custodian of the spirit wear and general PTO bank account funds
- Helps develop the budget
- Collects fundraising money
- Writes checks for purchases and reimbursements
- Tracks income and spending, and updates annual budget actuals monthly
- Produces financial reports and organizes the books for annual audit. Financial reports may be requested on an adhoc basis.
- Regular check in with president and vice president
- Computer literate—must know how to use Excel, PTO accounting software, PayPal, online banking and other financial platforms used by the PTO or be willing to learn.
- Update the signature cards at your PTO's bank
- Appreciates the value and power of a balanced budget
- Appreciates the value of a paper trail; willing to follow through on tight financial controls
- Honest, organized, and tenacious; not put off by paperwork, forms, documents, numbers
- Understands that this role is the custodian of other peoples' money
- Attend Board meeting monthly
- Attend General PTO meetings monthly
- Post financial transactions to our financial system as they occur throughout month
- Create monthly PTO treasurer reports (transaction report, performance to budget report)
- Reconcile checkbook
- Make deposits in a timely fashion, as needed, but no later than 1 week after receiving funds.
- Keep financial transaction forms available for all volunteers
- Preserve financial records, including invoices and control forms
- Present budget for approval at July PTO board meeting
- Work with the President to file Form 990-EZ (annual IRS information return required for (501)(c) groups) and maintain nonprofit status.
- File and pay quarterly sales taxes from spirit wear sales.
- Be able to create reports requested by board members as needed
- Facilitate annual financial review (audit)
- Facilitate transition one-on-one with incoming treasurer, including coverage of policies and procedures
- Be willing to meet with Event Chairs before and after events

## JUNIOR TREASURER/SPRIT WEAR DISTRIBUTOR

- Shadow and assist Senior Treasurer with their above listed responsibilities as needed.
- Facilitate transition one-on-one with outgoing senior treasurer, including coverage of policies and procedures
- Work alongside spirit wear coordinator as needed.
- Collect order products, bag orders and distribute to customers in a timely fashion.

## SECRETARY

- Record and type up minutes of executive board and general meetings
- Coordinate meeting minute reviews with VP and President within 3 days of executive board and general meetings. Meeting minutes must be published within 5 days to PTO folders and sent to board with action items.
- Bylaws expert
- Maintain a complete digital file of all approved minutes, agendas, and materials distributed at any official PTO meeting in concert with president and VP (shared PTO Google files)
- Write PTO newsletters to be published no later than the 7th day of the month
- Coordinate PTO newsletter review with VP and President no later than the 5th day of each month.
- Send out a mid-month board reminder email with action items.
- Attend executive board meetings and participate in discussions and decision making
- Familiarize yourself with Robert's Rules of Order, especially the instructions about the content and format of an agenda and minutes
- Submit district forms as needed. Ex. General Meeting venues

## (2) FUNDRAISING COORDINATORS (BOARD APPOINTED POSITION)

- Organizes annual fundraising schedule
- Oversees fundraising selection, planning, and evaluation
- Main contact and liaison representing the LES PTO regarding sponsorship and fundraising opportunities
- Responsible for making and keeping relationships with local businesses
- Looks for ways to give back to the community
- Looks for other fundraising opportunities
- Updates the annual sponsorship and donation request letters and communications
- Manages fundraising email account and maintains professional communications with community
- Works with and supports PTO board members and event committees to facilitate all fundraising needs
- Responsible for contacting businesses about donations for any PTO needs, and coordinating pick-ups of donations in a timely manner.
- Ensures the organization is kept of all donations and sponsors, sponsorship levels, and that the sponsor benefits are fulfilled.

## (2) SCHOOL LIASONS

- Organize annual events and items for school staff and students
- Create school bulletin boards/Partner with schools to create an effective timeline to update bulletin boards on a regular basis
- Invite and encourage staff members to PTO events and meetings
- Work with Co-Chairs and board to put on Teacher Appreciation Week and Adopt an Educator Week
- Help with school functions such as book fairs
- Have a good working relationship with staff members of school
- Assist, as needed, and attend school events and projects
- Be on the lookout for school and community outreach opportunities
- Work with fundraising coordinators and community to organize donations items for school staff and student giveaways
- School Kits:
  - o Work with schools to receive school kits information each year
  - o Communicate with Media Manager to advertise and market kits
  - o Work with School Kidz and School Secretaries to acquire teacher lists for the schools and submit them to School Kidz on time
  - o Responsible for meeting deadlines and acquiring discounts if possible
  - o Responsible for kit pickup coordination and pass out at back-to-school nights

## SPIRIT WEAR COORDINATOR (BOARD APPOINTED POSITION)

- Acquires bids, facilitates vendor contracts and develops designs/products to be added to spirit wear line for approval.
- Organizes all spirit wear line promotions/specials, new products or any other advertising needed, and works with Media Manager to publish on website and social media.
- Main contact for all spirit wear vendors.
- Receives orders, and coordinates orders with all vendors.
- Manages spirit wear email account and maintains professional communications with community.
- Collaborates decisions with Fundraising Coordinator and Spirit Wear Distributor
- Maintains inventory spreadsheet, and keeps all inventory organized.
- Ensures timelines are met by Senior Treasurer for filing and paying quarterly sales taxes from all spirit wear sales.
- Maintains sales spreadsheets pulled from website database of orders, taxes paid, transaction fees, etc.