

## PTO Job Functions

The Constitution provides for the following eleven (11) positions as elected Board Members. Each should be familiar with the PTO Constitution and By Laws and attend PTO meetings to ensure a quorum of seven (7) Board members are present, permitting the PTO to conduct formal business.

### **Board of Directors:**

The Board as a whole is responsible for the disbursement of moneys as described in Article IV of the By Laws. They also approve the PTO Budget, meeting minutes, the creation of special committees and appointments to fill vacancies in the Board or various Committees chairs.

### **President:**

Provides guidance and direction for the PTO and coordinates the activities of the PTO. It is a one-year administrative and public relations position. The PTO President works closely with the Principal and Board Members to set fund raising goals for PTO, establish event schedules, prepares the agenda for and presides over PTO meetings, and sees that activities and events are carried out in a timely manner. Applies for CUSD 'Site Use Permits for PTO activities. The President also appoints Board members and Committee Chairs when vacancies develop. S/he establishes Special committees as needed, may co-sign checks on all accounts and signs all official PTO correspondence. Maintains/archives original correspondence (excluding junk mail) s/he sends and receives.

May provide an annual President's letter to be distributed in the 1<sup>st</sup> Day Packet and a copy (via floppy or e-mail) to the Web Maestro for posting on the Web

### **First Vice President: (Fund-Raising)**

Oversees fund-raising and other program efforts. Attends initial committee event meetings at the President's request to ensure that the event direction and financial guidelines are understood. May co-sign checks on general accounts. Leads pilot projects. Insures Activity records are passed to successive Committee Chairs. Maintains/archives original correspondence (excluding junk mail) s/he sends and receives. Additional duties will vary according to the style/needs of the President.

Assumes the duties and responsibilities of the President in the absence or resignation of the President.

### **Second Vice President: (Grants)**

The Second Vice President is responsible for the Grant Program. This program was set up by the PTO to provide large amounts (generally can be anywhere from a couple of hundred dollars all the way up to \$3000) to be used for classrooms, for a grade level or for the entire school. The VP works with teachers and staff to identify critical, academic needs. The teachers/staff fills out a Grant Request Form, get it signed by the Principal and submit it to the Second VP. The 2<sup>nd</sup> VP maintains the Grant Log and follows up with the requests to make sure they are implemented, also provides funding direction to each grade level and works closely with the Principal.

Assumes the duties and responsibilities of the President in the absence or resignation of the President and First Vice President.

### **Secretary:**

The Secretary is responsible for taking, preparing and maintaining original copies of meeting minutes and other correspondence s/he may receive. Minutes should be reviewed and approved by the Board before publishing (this may be done at the Executive Board meeting prior to the General PTO meeting). Posts a copy on the bulletin board in the staff room. Forwards a copy to the Historian for filing in the PTO Book in the school office. The Secretary prepares other correspondence at president's request. The Secretary co-signs official PTO documents.

S/he provides meeting minutes via email to the PTO Officers and Committee Chairs, maintains the PTO calendar and the PTO roster of Officers and Chairs.

### **Treasurer:**

The Treasurer works with the President and the Principal to develop yearly budgets, handles the deposits and expenses of the organization; keeps comprehensive records of all expenses; signs checks; oversees cash handling at PTO events; prepares monthly written reports for distribution to Board members at PTO meetings; prepares the California and Federal Income Tax returns (due in November), as well as any county or local government required financial reports. The Treasurer should be familiar with the PTO Constitution and By-laws and other legal documents pertaining to the PTO's tax exempt status.

The Treasurer is responsible for maintaining original copies of Budgets and YTD Budget reports, Balance Sheets, transaction records and other correspondence s/he may receive.

A copy of the budget reports should be forwarded to the Historian for filing in the PTO Book in the school office. Presents budget report at PTO meetings.

May provide other items which would be of interest to the school and the community.

### **Health & Safety:**

This Board member is responsible for providing/maintaining the PTO's Emergency

Backpacks in each classroom. At the start of the school year, the contents of all emergency packs need to be checked, water and batteries replaced, etc. When/if a new class is added, a new backpack must be purchased and outfitted with appropriate supplies. H&S coordinates with a school staff-member and the student council for the district's Red Ribbon Week observances. This has meant purchasing red ribbons and pins, red table cloths, and coordinating promotional signs.. H&S acts on information received from PTA Council/CUSD regarding the county's Holiday Basket Program and coordinates our participation in it.

H&S is responsible for coordinating the appropriate health and safety items to have at each PTO event (i.e. Potluck, Pumpkin Panic, Ice Cream Social and any others) and work with the Principal.

**Historian:** (See Historian Procedures for additional detail)

The Historian accumulates and compiles information distributed by the PTO.

This information is maintained in a book promoting Stevens Creek School and the PTO, located in the School office. It is available for review, to both new parents and current parents. It should contain current year PTO meeting flyers, minutes, financial and budget statements, newsletters, event flyers and other 'general distribution' information. It is a snapshot view of the School and the District, and may contain SCS, CUSD and CEEF information, pictures from recent activities, and any other types of things which would promote the PTO and the school. It should be organized in a manner that simplifies both general browsing and looking for specific information.

Prior year books are archived and kept to meet the Internal Revenue Service requirement for non-profit organizations, that all documents distributed by the PTO are retained. Usually, the archive process is a matter of taking the Historian's book and filing it in the PTO closet at school. Space is at a premium 'in the closet,' so removing redundant information and information **not** generated by the PTO, and rebinding in soft cover helps. Redundant information would be PTO minutes and financial statements/budgets, where those original documents are retained by other PTO Board members, and should be retained until the period covered is no longer subject to IRS audit.

Third, this information is a reference source to future committee and board members to review a compilation of memos, letters and flyers distributed by the PTO and to see how the PTO has promoted its organization and events in prior years.

See Historian Procedures for suggested book contents:

**Hospitality:**

This position arranges refreshments and coordinates the First Day Coffee, Potluck, PTO

meetings, Staff Appreciation, and any special events as requested by President. Food contributions for these events can be solicited from parents via school newsletter or flyer and/or a list obtained from the Volunteer Coordinator. Sets up serving tables at PTO Potluck. This can be as simple as taping butcher paper from the Staff Room on the lunch tables. If name tags are called for at an event, Hospitality should provide them. No refreshments are required for the PTO meetings and are not in the budget. However, on special request from the President, Hospitality will provide refreshments for PTO meetings.

### **Publicity:**

Writes PTO news for the school newsletter, and creates signs and posters to publicize our major events. Event chairs (such as Pumpkin Panic, Ice Cream Social, Holiday Basket, etc.) should contact the publicity chair as far in advance as possible for signs. While event chair is responsible for the specific event's written communications such as flyers, order forms, etc., Publicity may choose to help. However, Publicity will need to post signs regarding First Day Coffee and Potluck events prior to opening of school, and reminders and directional signs on the first day of school. Prior to each PTO meeting Publicity Chair is to post the PTO meeting on the sign.

Copies of distributed items should be forwarded to the Historian for filing in the PTO Book in the school office.

### **Room Parent Coordinator:**

Recruits a room parent and several assistants for each classroom. This can be started at the First Day Coffee with a sign-up sheet, and on the volunteer sign-up sheet included in the First Day Packet. The Room Parent Coordinator holds a meeting very early in the school year with the room parents to explain their duties (arranging the class Halloween and Valentine parties, class event pictures, yearbook page, etc.). If a class still has no volunteer for a room parent, coordinate with the class teacher to send a note requesting volunteers to the parents in that class.

Copies of distributed items should be forwarded to the Historian for filing in the PTO Book in the school office.

**Auditor:** (See Accounting Policies and Procedures manual and Accounting for Taxes manual for more detailed information)

The auditing function provides a necessary 'third-party' check on the financial record-keeping processes of the PTO. The audit report should be completed in a timely manner and submitted to the new 'Executive' Board members no later than 60 days following the fiscal year end. If done later, it becomes more difficult to correct problems from the prior year, as well implement adjustments to procedures for the new year. The Auditor should review tax reports to governmental agencies to insure reporting is consistent with prior submissions. The Auditor should review the PTO Constitution and By-laws to understand funding and disbursement issues.

## **Functions - Committee Chairs**

**General:**

Committee chairs that are responsible for incurring expenses and generating income should review the current Fund Raiser Guidelines in the Policies manual. They should also maintain folders containing historical information about their activity, which are passed on to subsequent committee chairs to facilitate future event planning.

**Ice Cream Social Chair:**

This event can be held in the spring on the same night as Open House. The committee chair decides what types of frozen treats to have available. S/he establishes pricing policies, an event timetable and solicits both teachers and parents to assist in the setup, serving and clean up for the event. If ticket sales and cash receipts are involved, insures that a sufficient quantity of tickets are available and establishes the control of receipts, through submitting the funds to the Treasurer.

**New Parent Orientation Chair:**

Sets the agenda for and organizes a meeting for parents new to the school. Here, the principal is introduced to welcome these parents, and can explain the school's unique rules and procedures (i.e., early dismissal days, parking lot rules, upper and lower grade pick-up times, etc.) The PTO president explains what PTO is, why it funds school programs, current fund-raising programs including scrip; the importance of parent involvement including paying dues, coming to meetings, and general volunteerism; introduces attending board members and committee chairs. This meeting itself is an example of a PTO initiated and sponsored activity created by the need of new parents to get their questions answered in an informal, short session.

**Pumpkin Panic Chair:**

PTO involvement in event is in organizing 'peripheral' activities. The 'Haunted Hallway' which is one of the main attractions is completely organized and managed by the combined efforts of the fifth grade parents. It is the responsibility of the fifth grade parents to clean up the hall.

The committee chair establishes the content of the event, the pricing policies and coordinates volunteers to order snack foods, drinks and games and clean-up. S/he establishes an event time table and solicits both teachers and parents to assist in the setup, staffing of the various games and clean-up for the event. If ticket sales and cash receipts are involved, insures that a sufficient quantity of tickets are available and establishes the control of receipts and submitting the funds to the Treasurer.

**Student Directory Chair:** (See Student Directory Guidelines manual)

This chair organizes the activities necessary to publish a student directory with names and

addresses of Stevens Creek students and parents, class/teacher lists, e-mail directory, business directory and general school information provided by the principal. Directories are sent to all members who have paid PTO dues.

At the beginning of the year, the Board and Committee chair should decide:

- whether the PTO should continue to publish the Directory, (Historically there have been problems obtaining sufficient accurate information to justify the effort.)
- whether there should be any changes in content
- what the size and binding should be
- to whom and for how much, extra copies will be sold.

Timing is critical to this effort. As much information as possible should be prepared and verified prior to the beginning of school.

**Volunteer Coordinator:** (See procedures for Volunteer Coordinator for additional detail)

Prepares a volunteer opportunity sign-up sheet for First Day Packet. Collects and sorts sheets, and prepares lists of volunteers/phone numbers for each area of need. Appropriate lists are forwarded to respective committee chairs and helps committee chairs recruit volunteers for the major social or fundraising events, or for other needs that arise during the year, including school T-shirts, helping the school photographer, preparing the school/PTO calendar, Kindergarten sign-ups, etc. A supply of volunteer sheets should be available at all PTO meetings.

This Committee Chair position was established (mid-nineties) to more effectively utilize the vast talents and interests of our parents, helping Board members and committee chairs recruit interested volunteers to help with PTO events and programs. Particular attention should be given to finding outlets for those parents who volunteer special skills.

S/he can also help the school staff find volunteers to help with school events and programs.

Requests to make phone calls or prepare and send flyers are usually at the last second. In an effort to make planning easier, included in the Volunteer Coordinator binder are copies of flyers and sign-ups for the events of the last year.

**Walkathon Chair:**

This all-school event is PTO's major fund-raiser, where children get pledges and walk laps around the field. There are also auxiliary activities, such as games and refreshments or meals. It has been held on a Friday during school, where each grade walks as a PE. Period. The chair, with its committee and concurrence of the Board, can choose a new theme or method. The chair's job would be to get approval of the overall plan, recruit committee members to oversee the various components such as forms duplicating, pledge tallies, publicity, course lay-out, first aid, volunteer placement, games and prizes (if any), soliciting sponsors, event T-shirts, etc.

**Web Site Chair:**

Maintains/enhances the PTO Web pages on the Stevens Creek School Web site. Coordinates collection of source files from the various Board and Committee heads for posting to the Web site. New or updated pages should be viewed using various browsers to establish browser incompatibilities. Coordinates the page update process with the school's Technology Aide. The Web site can and will be viewed by many people on the Internet. Our Web pages directly reflect on the PTO and Stevens Creek School. A high priority should be given to correcting any mis-information, if any.

**Yearbook Chair:**

This person works with a committee and the photographer to create a school yearbook with individual and group photos for each grade level. Guidance is provided by the photographer/producer. The PTO owns a camera which is available for taking pictures at any school event. Each classroom helps design its own class page, with guidance from the Yearbook Chair. Costs are carefully monitored so assure that this will be at least a break-even effort and not a net cost to PTO. Chair sends out order forms, collects money, and is responsible to distribution of yearbook the last week of school.