

Rattlesnake PTA Position Descriptions

Document approved June 2017

Elected Officers

The elected officers shall be president, vice-president, secretary and treasurer. Terms may last 1-2 years.

- The President/Secretary will be elected during even years unless there is a vacancy
- The Vice-President/Treasurer will be elected during odd years unless there is a vacancy

<u>Current Dates</u>	<u>Term Started</u>
President, Maggie	11/02/16
Vice-President, Anne	11/02/16
Treasurer, Alex	12/03/15
Secretary, Laura	<i>2015, month not specified</i>

President Responsibilities

The president is responsible for leading the PTA toward specific goals and priorities chosen annually by its members. The goals must be consistent with the policies and purposes of the PTA. The president is the presiding officer and the official representative of the association.

The president will:

Meetings

- Set the agenda for general and leadership PTA meetings; and
- Facilitate all general and leadership PTA meetings. If unavailable, president will identify a meeting lead.

Communication

- Work with the other elected officials, committee leads, and other leadership positions to support their responsibilities;
- Work collaboratively with school staff and administration; Serve as the primary point of contact with the Principal; and
- Work collaboratively with parents, guardians, and members of the community.

Administration

- Conduct the administration of the PTA in accordance with its Charter/By-Laws;
- Monitor and manage the business of association – oversee and approve budget with membership; facilitate the PTA email; review and approve any written/electronic materials produced by the PTA;
- Sustain and increase a diverse and inclusive membership;
- Help identify future leaders and elected officials;
- Enter member information in the National PTA online membership database system;
- Stay apprised of School District Board meetings and updates as related to the PTA; and
- Review National PTA and Montana PTA goals and purposes.

Vice-President Responsibilities

The vice president may be called upon at any time to temporarily assume the place of the president; thus, he/she should know the president's duties and responsibilities.

The vice president will:

Overlap with the president:

- Conduct the administration of the PTA in accordance with its Charter/By-Laws;
- Assume responsibility for duties in coordination with the president (may include updating the PTA Facebook account; oversight of leadership positions, participation in events, etc.);
- Work collaboratively with other elected officials, committee leads, and other leadership positions;
- Work collaboratively with the school staff, administration, parents, guardians, and broader community; and
- Represent the president in her/his absence or upon request.

Administration

- Maintain a copy of the unit charter/bylaws and standing rules
- Maintain a copy of the unit approved budget
- Maintain contact information for all officers
- Maintain contact information for state PTA leaders

Treasurer Responsibilities

The incoming treasurer should discuss with the former treasurer the status of current fundraising activities, what money is available to be spent versus what is owed, and the bylaws as they relate to the treasurer's responsibilities.

The treasurer will:

Meetings

- Submit a written financial statement at each board meeting and general membership meeting;
- Obtain authorization from the leadership board before approving or denying a funding; and
- Prepare an annual budget report to be used to review PTA financial records; request.

Revenue/Expenses

- Ensure that the PTA's financial records are reviewed according to the charter/bylaws;
- Ensure only current authorized signatures are on file at the bank for financial transactions (current president and treasurer);
- Obtain authorized signatures on every check (treasurer or president)
- Collect money for person(s) delegated to raise funds/collect money during a PTA event or activity, and provide a written receipt for those funds;
- Promptly deposit all money in the name of the PTA in a bank account approved by the board; and

- Maintain accurate record of all receipts and disbursements.

Administration

- File all regulatory forms, especially IRS form 990-N, 990-EZ, or 990 (whichever is required by IRS code) and the Secretary of State Annual Corporation Report.
- Submit Membership Dues and Insurance premium must be submitted to the Montana PTA by the dates designated by the Montana PTA (November).
- Ensure the PTA insurance is updated.

Secretary Responsibilities

The secretary is responsible for keeping an accurate record of the proceedings of association meetings. These records are the permanent history of the PTA.

The secretary will work closely with the President, Vice-President (facebook) and the Communication Lead (website) on incoming and out-coming communications with members and notifications of meetings and other events.

Prior to a meeting, the secretary:

- Sends an announcement of the meeting (date and time) via email (Technical Lead will send an announcement of the meeting via Facebook and Website).
- Works with the president to create an agenda

At the meeting, the secretary:

- Takes attendance (by voice vote or sign-in sheet)
- Checks for quorum
- Takes minutes
- Counts votes (if there is a vote)

After the meeting, the secretary:

- Share meeting minutes with the leadership team
- Ensures the approved minutes are included in the permanent record of the association by saving a version to PTA Google Drive and with the Communications Lead (for posting on PTA website)
- Identifies tasks/assignments in the minutes
- Identifies list of unfinished business to be discussed in the minutes

The secretary should maintain:

- Minutes of the previous meetings
- Charter and By-laws (Google Drive)
- List of board members and committee chairs (in PTA Google Drive)
- List of unfinished business to be discussed
- Current membership list