

PTO President Job Description

Characteristics:

- Desire to serve the PTO, the school, and ultimately the students
- Understanding of the organization's mission
- Willingness to delegate tasks
- Good listening skills
- Effective communication skills

Responsibilities:

- Preside at general PTO meetings and executive board meetings
- Serve as the primary contact to the principal and represent the PTO at meetings of other groups, if needed
- Serve as an ex-officio member of all committees
- Retain all official records of the PTO

Typical Monthly Tasks:

- Prepare for and lead executive board meetings
- Prepare for and lead PTO meetings
- Review the treasurer's report
- Have regular check-in meetings with the principal
- Thank volunteers for their efforts

Typical Annual Tasks:

- Finalize the activities calendar with the principal
- Set the schedule of monthly executive board meetings for the year
- Hold a committee chair orientation
- Update the signature cards at your PTO's bank
- Double-check key organizational dates, including your PTO insurance policy renewal, incorporation with the state, and IRS Form 990 or 990-EZ, if applicable
- Determine which officer and committee chair positions might need to be filled next year, and reach out for volunteers

Training and Resources:

- One-on-one with outgoing president
- PTO Today's Leader's Toolkit
- Articles about president topics
- Past files and examples
- Computer files

PTO Vice President Job Description

Characteristics:

- Desire to serve the PTO, the school, and ultimately the students
- Understanding of the organization's mission
- Good listening skills
- Effective communication skills

Responsibilities:

- Assist the president
- 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
- Be an ambassador for the PTO and the school

Additional duties as defined in the PTO's bylaws.

Common additional duties include:

- Oversee committees, train committee chairpeople, and act as a liaison between committee chairpeople and the executive board
- Oversee fundraising selection, planning, and evaluation
- Serve as PTO parliamentarian
- Serve as a bylaws expert
- Be a liaison for new families
- Lead the annual membership drive

Typical Monthly Tasks:

- Participate in executive board meetings
- Participate in general meetings

Typical Annual Tasks:

- Familiarize yourself with Robert's Rules of Order
- Familiarize yourself with the PTO's bylaws
- Other tasks as designated by the executive board

Training and Resources:

- One-on-one with outgoing vice president
- PTO Today's Leader's Toolkit
- Articles about vice president topics
- Past files and examples
- Computer files

PTO Treasurer Job Description and Duties

Job Description

The PTO treasurer is the custodian of the parent group's funds. The treasurer helps develop the budget, collects fundraising money, writes checks for purchases and reimbursements, tracks income and spending, makes financial reports, and organizes the books for annual audit. As a member of the executive board, the treasurer represents the parent group, and thus her actions reflect upon the reputation of the group and the school.

Characteristics

- Desires to serve the PTO, the school, and ultimately the students
- Computer literate—must know how to use Excel and Quicken or be willing to learn
- 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
- “In touch” with school activities and PTO business, or wants to become in touch
- Understands that this role is the custodian of other peoples' money

Time Commitment

- Board meeting monthly
- General PTO meetings monthly
- Most work can be done on your own schedule

Typical Monthly Responsibilities

- 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
- Write checks as needed (two signatures and proper paperwork required)
- Make deposits in a timely fashion, as needed
- Keep financial transaction forms available for all volunteers
- Preserve financial records, including invoices and control forms

Typical Annual Responsibilities

- Lead annual budget development process in August
- Present budget for approval at September PTO meeting
- File Form 990-EZ (annual IRS information return required for 501(c)(3) groups)
- Renew incorporation with the state
- Facilitate annual financial review (audit)

Training and Resources

- One-on-one with outgoing treasurer
- Articles about treasurer topics
- Past files and examples
- Computer files
- PTO Today Treasurer's Toolkit

PTO Secretary Job Description

Characteristics:

- Desire to serve the PTO, the school, and ultimately the students
- Understanding of the organization's mission
- Good listening skills
- Effective communication skills
- Good computer skills
- Strong organizational skills

The secretary's responsibilities include both record-keeping and communications. Some PTOs divide the job into two positions, a recording secretary and a corresponding secretary.

Recording Secretary Responsibilities:

- Prepare agendas for general meetings
 - Record and distribute minutes of executive board meetings and general meetings
 - Maintain a complete file of all approved minutes, agendas, and materials distributed at any official PTO meeting
- Typical Monthly Tasks:**
- Attend executive board meetings and participate in discussions and decision making
 - Record minutes of executive board meetings
 - Prepare agendas for general meetings, as developed in the executive board meeting
 - Photocopy the minutes from the last general meeting for distribution (and approval) at the upcoming general meeting
 - Record minutes of general meetings and distribute them in a timely manner

Typical Annual Tasks:

- Familiarize yourself with Robert's Rules of Order, especially the instructions about the content and format of an agenda and minutes
- Set up a filing system at your house and on your computer

Corresponding Secretary Responsibilities:

- Determine, with executive board approval, the most appropriate methods and frequency of communicating with members
- Manage communications and marketing for the PTO, including but not limited to:
 - PTO newsletters
 - Email broadcasts
 - Website
 - Social media
 - Bulletin boards

Typical Monthly Tasks:

- Use email to send meeting reminders, announce upcoming events, and distribute the PTO newsletter
- Review PTO website and social media sites and update as needed
- Prepare the PTO newsletter or submit PTO news for the school newsletter
- Prepare notes of thanks, sympathy, inquiry, etc. as needed on behalf of the PTO and with approval of the executive board
- Update bulletin board displays

Typical Annual Tasks:

- Collect email addresses from members
- Maintain a file of all your work, including photos of displays and samples of each document
- Notify local media about interesting PTO news

Secretary Training and Resources:

- One-on-one with outgoing secretary
- PTO Today's Secretary's Toolkit
- Articles about secretary topics
- Past files and examples
- Computer files