



# Hazelwood Elementary PTSA

7100 116th Avenue SE, Newcastle, Washington 98056

<http://hazelwoodptsa.org>

## HAZELWOOD PTSA EXECUTIVE TEAM JOB DESCRIPTIONS

This document summarizes how the Hazelwood PTSA has approached the Executive Team in recent years. The Washington State PTA Handbooks for President/Vice President, Secretary and Treasurer roles, as well as the “Managing Your Non-Profit PTA” manual expand on this information in more detail.

### President

The president is the spokesperson of the PTSA. The president presides over Executive Board meetings and General Membership meetings. The president fosters a positive relationship with the Principal and school staff, and encourages PTA members to do the same. The President promotes a positive image of PTA in the community, and fosters relationship with the Renton Council PTA and WSPTA as able. The President also:

- Appoints non-officer positions such as Advocacy Chair and Membership Chair
- Helps to recruit and support chairpersons for all committees and events
- Shares information from WSPTA’s Leadership News with committees, chairs and members as appropriate
- Supports Executive Team members; adds new officers to the WSPTA membership database
- Develop agendas for Executive Team meetings and General Membership meetings
- Attends check -in meetings with the school twice per month, along with another PTSA officer

### Secretary

The main role of the Secretary is to take and distribute minutes for each Executive Team meeting and General Membership Meeting, and ensure the PTSA follows the Record Retention policy of the Washington State PTA. The secretary may also work with the President on setting and distributing agendas. The Hazelwood PTSA secretary has also:

- Handled correspondence in and out of the physical PTSA office at Hazelwood
- Managed the relationship with the PTSA copier company
- Acted as point person for organizing PTSA storage at Hazelwood.
- Taken the lead on labeling items purchased for the school by the PTSA.

### Treasurer

The treasurer is the authorized custodian to manage the funds of the PTA on behalf of the membership. The treasurer serves as chair of the budget committee and presents the budget to the board and membership. The treasurer must also:

- Keep an accurate and detailed account of all funds received and disbursed in Money Minder
- Submit a detailed, written monthly financial report at each Executive Team meeting and each General Membership Meeting.
- Submit written reports by email during months when no meetings are held.

- Assure all PTSA funds are promptly deposited into the PTSA bank account.
- Assure that appropriate and adequate insurance is purchased for the PTA.
- Pay all authorized financial obligations of the PTA, including membership dues and fees owed to a council (if any), in a timely manner.
- Prepare and file the appropriate IRS informational forms (990-N, 990-EZ or 990), state sales tax forms, annual incorporation renewal report, Charitable Solicitations report, business license, and any city/county licenses in a timely manner.
- Preserve all receipts, invoices, bank statements, cancelled checks, and other financial records as required
- Provide documents to the audit committee and be available for questions.
- Develop and present, with the support of the budget committee, the budget for the following year to the General Membership.
- Submit an annual report at the end of the fiscal year (June 30).

### **Vice President(s)**

The position of the vice president can be adapted to the needs of each individual PTA. It is common to have multiple VP roles that are each responsible for a functional area. A Vice President can have a general role of supporting the president and being a liaison with Committees & Events. And/or a Vice President can focus on a specific area such as Grants or Fundraising or Communications. A Vice President presides at meetings in the absence of the president. A Vice President can:

- Develop agendas for the twice monthly “check in meetings” with the school in partnership with President; take and distribute notes for those meetings
- Partner with the President on writing key summaries and updates for the membership and the school.
- Note: In recent years, the Communications lead (Hoofbeats, EBulletin, PTSA website) has been on the Executive Team as a VP. This is not required; but has worked well to streamline the flow of information. If the Communications lead is not an officer in a future year, the secretary and/or the President would need to share timely information with the Communications lead.

### **All Elected Officers**

All elected officers (President, Treasurer, Secretary, Vice President(s)) act as a fiduciary and are responsible for the financial well-being of the PTSA. (see “Managing Your NonProfit PTA” handbook for more information about the financial duties of officers.) Elected Officers:

- Vote on all motions at the monthly Executive Team meetings; review reports and provide feedback.
- Review and provide feedback and/or approve meeting notes.
- Attend council, region, and/or state training, webinars, workshops, and convention as able; at a minimum attend one training per year, and at least one board member take the class “PTA and the Law”.
- A few elected officers become signatories on the PTA bank account; each PTSA check written requires two signatures.
- An elected officer that is a not signatory on the PTSA bank account completes monthly reviews of the PTSA bank statement, then completes and submits a form summarizing findings to the treasurer.

The Executive Team meets monthly; meetings typically run 2 hours total, and are held at an Executive Team member’s house. The Executive team also attends as many Hazelwood PTSA General Membership meetings as possible; they are one hour each, and held at the school. Time above and beyond these meetings depends on the specific role (President, Treasurer, Secretary, VP). The term of office is one year, July 1- June 30. No member may serve more than two consecutive terms in the same office. The peak times of need at the school are the beginning and end of the school year. The Hazelwood PTSA is growing a culture of avoiding volunteer burnout by helping one another, anticipating needs and/or

making changes when necessary. Two people can also share a role. One of our motto's is "There are no PTA emergencies". We thrive on teamwork and clear communication.