

Welcome to the George F. Roberts PTO Board

Serving on the PTO Board is an opportunity to make a meaningful impact on our students, families, and school community. This guide is designed for those interested in serving on the PTO Board. It outlines how the PTO operates, what's expected of board members, and the responsibilities of each officer's role.

What You Should Know Before Serving

Understanding the PTO's Role

The George F. Roberts PTO is an independent, parent-led organization that operates as its own entity. While we work closely and collaboratively with school administration and staff, the PTO functions separately from the school and school district. As such, the PTO is responsible for its own governance, finances, decisions, and operations in accordance with its bylaws and applicable guidelines.

How the PTO Is Governed

The PTO operates under the following guided document:

- **Bylaws** – Define the authority, structure, officer roles, elections, and overall governance of the PTO as an independent organization.

All board members are expected to be familiar with and act in accordance with this document.

Officer Terms & Responsibilities

- Officers are elected annually and serve one-year terms.
- No officer may serve more than two consecutive terms in the same role.
- All officers must act in alignment with PTO bylaws, policies, and district guidelines.

Officer Vacancies & Continuity

While the PTO strives to fill all officer positions each year, vacancies can occur. The PTO has clear procedures in place, outlined in the bylaws, to ensure continuity if a role is not filled or becomes vacant.

- If the **President position becomes vacant**, the Vice President will step into the President role. A new Vice President will be elected at the next regularly scheduled meeting.
- If **any officer position is not filled**, its responsibilities may be temporarily assumed or shared by another board member.
- If the **Bookkeeper role is not filled**, those responsibilities must be assumed by either the Vice President or the Secretary.

These procedures allow the PTO to continue operating smoothly and responsibly while maintaining transparency and accountability. Serving on the PTO Board requires flexibility, collaboration, and a shared commitment to supporting the organization when needed.

Accounts, Access & Transitions

- All PTO-related accounts, passwords, records, and contact information belong to the PTO, not individual members.
- Proper transitions are critical for continuity and transparency.
- The President oversees and verifies all transitions.

Meetings, Participation & Communication

- Board members are expected to attend meetings regularly.
- Participation in PTO events is an important part of board service.
- Officers should communicate proactively if conflicts or concerns arise.

Records, Transparency & Continuity

- Accurate records protect the PTO and its members.
- Timely meeting minutes, financial reporting, and organized transitions are required.
- Clear documentation ensures long-term success from year to year.

Serving on the PTO Board is a position of trust. We value collaboration, transparency, and a shared commitment to doing what's best for our school community.

PTO Board Roles & Responsibilities

President

The President provides overall leadership and ensures the PTO operates smoothly, responsibly, and in alignment with its mission.

Key Responsibilities:

1. Preside over all General PTO and Executive Board meetings.
2. Serve as the primary point of contact with the school principal.
3. Act as an ex officio member of all committees (except the nominating committee).
4. Coordinate the work of all officers and committees.
5. Provide guidance, resources, and support to officers and committee chairs.
6. Serve as a secondary check signer along with the Treasurer.
7. Prepare and distribute meeting agendas in advance.
8. Ensure compliance with PTO bylaws, policies, and district guidelines.
9. Conduct annual officer onboarding and oversee smooth transitions at the end of each term.
10. Collaborate with the Vice President and Secretary to seek and secure donations or sponsorships from community partners.
11. Oversee operational planning for the school year, including:
 - ✓ Scheduling an annual planning meeting with the principal.
 - ✓ Obtaining required forms, student lists, and school schedules.
 - ✓ Coordinating bilingual PTO communications to support accessibility.
 - ✓ Organizing General PTO and Executive Board meetings.
 - ✓ Ensuring all PTO records, accounts, materials, passwords, and access credentials are properly maintained and transferred at the conclusion of officer terms.

★ Vice President

The Vice President supports the President and leads communication, engagement, and volunteer coordination efforts.

Key Responsibilities:

1. Assist the President and assume duties in their absence.
2. Oversee public relations and community engagement, including the Roberts PTO Facebook page and other platforms.
3. Maintain and update the outdoor PTO display case.
4. Serve as a liaison between event committees and the President.
5. Support volunteer recruitment, coordination, and appreciation.
6. Ensure event forms, building usage requests, and volunteer requirements are completed.

★ Secretary

The Secretary ensures accurate documentation, communication, and organizational continuity.

Key Responsibilities:

1. Record and prepare clear, accurate minutes for all General PTO and Executive Board meetings.
2. Submit draft minutes to the President within two weeks of each meeting.
3. Create and distribute the monthly PTO calendar of events and deadlines.
4. Maintain and safeguard official PTO records, including minutes, bylaws, policies, and key documents.
5. Collaborate with the Vice President to support consistent PTO communication.
6. Maintain a current list of officers, committee chairs, and contact information.
7. Track annual PTO events and deadlines to support planning and continuity.
8. Prepare and distribute meeting notices, reminders, and volunteer communications.
9. Partner with the President and Vice President on donation requests and sponsor tracking.

★ Treasurer

The Treasurer is responsible for overseeing PTO finances and ensuring fiscal responsibility.

Key Responsibilities:

1. Receive and manage all PTO funds.
2. Work closely with the Bookkeeper to record receipts and expenditures.
3. Disburse funds in accordance with the approved budget.
4. Issue reimbursement checks on the 1st and 15th of each month (unless otherwise agreed).
5. Attend General PTO meetings as needed (either the Treasurer or Bookkeeper must be present).
6. Support the Bookkeeper during budget preparation and year-end reporting.

★ Bookkeeper

The Bookkeeper supports financial accuracy, transparency, and reporting.

Key Responsibilities:

1. Maintain accurate financial records in collaboration with the Treasurer.
2. Serve as a secondary verifier for PTO expenditures.
3. Complete monthly account reconciliations and share them with the board.
4. Prepare and submit required annual tax and financial filings.
5. Present quarterly budget updates to the Executive Board.
6. Maintain organized digital records of deposits, receipts, and invoices.
7. Provide financial statements upon request and a full year-end report at the budget meeting.
8. Assist with budget preparation and year-end financial reporting.

★ Teacher Representative(s)

Teacher Representatives help strengthen communication and collaboration between staff and the PTO.

Key Responsibilities:

1. Serve as a voice between Roberts' staff and PTO members.
2. Be selected by the PTO Board or Principal to provide staff input and perspective.
3. Share PTO updates during staff meetings.
4. Encourage teacher participation in PTO activities and events.

This document is intended to support transparency, consistency, and informed participation for all current and prospective PTO Board members.