

# Agenda

Mascotte Charter PTO

---

Tuesday, November 17, 2020 @ 4:30 - [via Zoom](#)

---

Please [CLICK HERE](#) to Join via Zoom:

ID: 660 342 2279

Passcode: [pto](#)

## Topics

Welcome & Call to Order

Approval of Minutes for February 2020

Treasurer's Report

New Business

1. Vote in new PTO Board members. Up for grab is President, Vice President, Secretary, and Treasurer.
2. Grade Level Funds
  - a. Discuss on how to allocate this year's grade level funds.
  - b. How to include VPK and ESE
3. Discuss upcoming PTO meeting dates/times

Principal Report

Floor Open

Adjournment

- Next meeting: TBA

## **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

### *Typical Monthly Tasks:*

- Prepare for and lead PTO meetings
- Have regular check-in meetings with the principal
- Thank volunteers for their efforts

## **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
- Good computer skills
- Strong organizational 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
- Oversee fundraising selection, planning, and evaluation
- Be a liaison for new families
- Lead the membership drive

### *Typical Monthly Tasks:*

- Participate in executive board meetings

## 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.

### *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 board meetings
- Prepare agendas for general meetings, as developed in the 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:*

- Set up a filing system at your house and on your computer
- Determine, with board approval, the most appropriate methods and frequency of communicating with members
- Manage communications and marketing for the PTO

## **Treasurer Job Description**

**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 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
- File Form 990-EZ (annual IRS information return required for 501(c)(3) groups)
- Renew incorporation with the state
- Facilitate annual financial review (audit)