

BLUE OAKS PTC

Working together for our students

PTC BOARD DESCRIPTIONS

All Positions

- Make every effort to attend all PTC Board meetings and general meetings
- Assist specifically at Back to School Night(s) at the PTC membership table
- Show support for our PTC Representatives, event/activity chairs and provide volunteer time whenever possible

PRESIDENT (ELECTED)

- Develop agendas for and preside over all general and Executive Board meetings
- Prepare the master calendar with input from the Principal
- Work with Executive Board to develop a budget for the year
- Coordinate the officers and committees towards the goals of the PTC
- Meet with the Principal on a regular basis for communication and approval
- Appoint non-elected officers and committee chair people
- Keep parents and staff apprised of PTC activities
- Act as primary liaison and problem solver for parents and staff
- Sign checks for all PTC funded activities
- Promote the objectives of the PTC
- Work with Media Coordinator to write monthly blurb for school newsletter
- Keep Blue Oaks PTC current with items such as business license, annual registrations renewal report w/ Attorney General of CA, liability insurance, etc...
- Perform other duties mentioned in other job descriptions

VICE PRESIDENT A (ELECTED)

- Temporarily assume any duties or responsibilities of the President in his/her absence



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- Assume check signing privileges in the absence of the President
- Assist President with any big picture planning, trouble shooting and team building/support
- Help with recruiting chairpersons and committee members for events and activities
- Makes every effort to attend any events specifically supported by this position to offer on-site assistance
- Stay in close communication with specific chairpersons and committees as needed by way of emails, phone calls and committee meetings. (2 months out, 1 month out, two weeks out, and week of event/activity). Ensuring that events and activities reflecting a reasonable timeline, within budget and the overall planning thought through
- Specific Chairs/Committees for this position include:
 - Box Tops & Labels for Education
 - E-Scrip
 - Learn to Earn
 - Dinners Out
 - Book Fair
 - Fundraiser/s
 - Walk-A-thon

VICE PRESIDENT B (ELECTED)

- Help with recruiting chairpersons and committee members for events and activities
- Makes every effort to attend any events specifically supported by this position to offer on-site assistance
- Stay in close communication with specific chairpersons and committees as needed by way of emails, phone calls and committee meetings. (2 months out, 1 month out, two weeks out, and week of event/activity). Ensuring that events and activities reflecting a reasonable timeline, within budget and the overall planning thought through.
- Become familiar with the state and local requirements for fundraising
- Specific Chairs/Committees for this position include:
 - Bear Jamboree
 - Spirit Wear
 - Pancake Breakfast

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- o Auction/Adult Event/Parent Night Out
- o Staff Appreciation
- o Art Docent

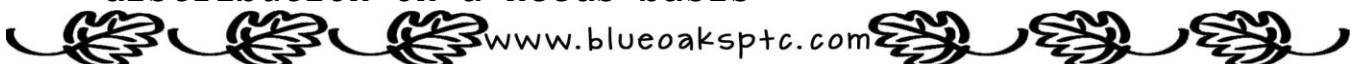
SECRETARY: (ELECTED) This position can be held by one individual or divided into more than one position at the request and agreement of candidates and the PTC members. Division of responsibilities will be determined by the Secretary(s) and the President, but may be similar to the following:

A) RECORDING SECRETARY

- Create and maintain the annual membership roster
- Record the minutes of Executive Board and general meetings, Special attention should be given to any item voted on. Who motioned, who seconded, yay, nay votes, unanimous, etc.
- Prepare meeting minutes and email a copy to the President within a week
- After each general meeting, acquire teacher report to add to the tentative minutes
- Keep an official file of all agendas and meetings minutes, should it need future referencing
- Make and distribute copy of prior general meeting minutes at PTC general meetings
- Once approved post minutes from previous month on PTC bulletin board
- Send approved final copy of general meeting minutes to Media Facilitator to post on the website

B) SECRETARY CORRESPONDING

- Assist the School Staff and PTC President with Blue Folder and PTC packet assembly prior to school year
- Create and distribute notices of PTC meetings one week prior to meeting date
- Support President by copying and distributing PTC meeting agendas
- Check PTC box once a week and handle any correspondence (thank-you's, no thank-you's etc,) the President has requested
- Support the President or PTC with any other copies or distribution on a needs basis



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- Create and distribute special invitations (ie. 5th grade invite for Cooley presentation)
- Support Nurses office with twice a year shopping trips for supplies

TREASURER (ELECTED)

- Obtain all hard copies, records and materials from predecessor
- Train with predecessor ASAP to go over procedures, programs, areas of interest, etc.
- Assist the Principal and President on the budget planning
- Present proposed budget at the first Board and PTC meeting for approval
- Make all deposits promptly and report to Financial Secretary for recording and accountability
- Submit financial report at PTC Board and general meetings, keep us updated
- Facilitate and provide account information for audit at the end of the year
- Oversee tax returns and files required by law
- Work with Financial Secretary to control and collect all bounced check issues
- Provide cash and cash boxes for all events/activities as needed
- Attend all events where money may need to be counted (2 people must count it and sign "income form")
- Hold onto any petty cash and change as needed

FINANCIAL SECRETARY (APPOINTED)

- Obtain all audited information financial records and materials for the previous financial team
- Receive all money transactions from the President and Treasurer
- Record all receipts and transactions in detail to the QuickBooks program
- Bill all credit card transactions as needed through the QuickBooks system



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- Work with the Treasurer to collect and control bounced check issues
- Prepare all reimbursement or payment checks and get to the President to sign
- Monitor PayPal account and transfer money periodically
- Reconcile monthly bank statements and prepare monthly financial reports
- Distribute monthly reports to the Treasurer and President
- Keep the checkbook up to date with current bank balance
- Supply staff account information twice a year

HISTORIAN: (APPOINTED) This position can be held by one individual or divided into more than one position at the request and agreement of candidates and the PTC members. Division of responsibilities will be determined by the Historian(s) and the President, but may be similar to the following:

A) HISTORIAN A

- Work with the school photographer and it's program to create the school yearbook
- Communicate with photographer to confirm any picture day specifics or needs
- Work with staff to create and distribute notifications for picture day(s)
- Create and distribute all Yearbook order forms and communications
- Keep records of all yearbook and message sales (3 offers, message sales, distribution times/ sales)
- Provide photos to Media Coordinator for the website as needed

B) HISTORIAN B

- Create a picture board for Back to School Night's membership table of past achievements and events
- Maintain a file and keep record of school activities/calendar for the school year (assemblies, school events, flyers, plays and productions, etc)
- Create and update the PTC bulletin board in the office monthly



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- Safeguard past records and pass them later to successor
- Assist Historian A with yearbook orders, distribution and support throughout yearbook creation as needed.

PARLIAMENTARIAN (APPOINTED)

- Connect with the predecessor and obtain Bylaws document and Roberts Book of Order
- Review Book of Order and ensure that the voting process and procedures are conducted appropriately at meetings
- Advise the President should a parliamentary procedure be questioned
- Ensure that each Board member receives a copy of the Bylaws at Summer meeting date
- Form and Chair end of the year annual Bylaw review committee
- Support PTC facilitator as needs arise to ensure smooth meeting start and finish
- Present proposed Bylaw changes at the last general meeting of the year and get membership approval
- Create, maintain and coordinate the No Hassle Fundraising records, coupons and confirmations
- Work with the librarian to assign No Hassle dedications
- Work with the financial team to organize payment plan No Hassle members

MEDIA COORDINATOR (APPOINTED)

- Meet with President to confirm events/activities/school calendar and set preempt dates for notifications, reminders and NEWS
- Submit all weekly text to President for edit and approval, always working two days ahead of the current notification
- Send out finalized weekly eNewsletter using Constant Contacts
- Supply Webmaster with finalized weekly text website updates

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- Watch for school/event/activity time changes and reflect such changes in next edition
- Develop and maintain the email distribution list
- Review PTC website and Facebook page periodically and provide recommended changes to the President
- Work with Webmaster to change website

PTC FACILITATOR (APPOINTED)

- Coordinate dates and confirm locations for PTC Board and general meetings and babysitting
- Arrive a half-hour early to meeting to ensure that set-up is completed before meeting time
- Use allocated funds to supply light refreshments—creating a comfortable setting
- Provide a sign-in sheet to record general meeting attendance and give to Secretary at the end of the evening
- Obtain two dependable sitters, over age 14 and coordinate with Treasurer to make sure they are paid at the end of the evening
- Ensure that meetings begin on-time
- Lead the Pledge of Allegiance at all general meetings
- Ensure that meeting location is left in an orderly and secure condition
- Secure small raffle prizes, set out raffle box and draw names at each general meeting
- Support the President as needed

PTC LIAISON TO THE SCHOOL SITE COUNCIL

- Attend School Site Council and PTC Board and general meetings
- Provide informational perspective/input regarding events and activities of interest to both groups

VOLUNTEER COORDINATOR (APPOINTED) This position can be held by one individual or divided into more than one position at the



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request and agreement of candidates and the PTC members. Division of responsibilities will be determined by the Volunteer Coordinator(s) and the President.

- Aide President and Vice President in recruiting chairpersons and committee members for events and activities
- Create master Volunteer list using membership forms and volunteer check points
- Email copy of compiled volunteer list to President
- Assist chairs with the coordination and provision of volunteers, all emails to be sent through the volunteer coordinator specifically
- Whenever possible attend committee planning meetings for large events to ensure understanding of volunteer needs and that adequate volunteer base is supplied
- Notify Media Coordinator in advance of any specific volunteer requests to go out via eNews, website, Facebook page or specific mass emails
- Attend events to greet and manage the volunteer table
- Send thank-you's and give them generously
- Keep the Board informed on volunteer availability and needs
- Work with teachers to help identify possible classroom representatives and Art Docents
- Provide leadership and coordination of the classroom PTC representatives
 - Send monthly reminders to class reps about upcoming meeting & provide notes from PTC meetings
 - Provide classroom reps with instruction on their role
 - Ensure that classroom items for auction are created and collected

PAST PRESIDENT ADVISOR (APPOINTED)

- Provide incoming President with all historic information and files
- Attend all Board meetings
- Provide advice to the Executive Board as needed, but does not vote



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- Provide assistance to the President as requested