



# ALKI PTA BOARD

## ROLES & RESPONSIBILITIES

**Duties of a Nonprofit Board member: (from WSPTA Leadership Handbooks)** Each elected member of a nonprofit board has three legal duties, collectively known as their "fiduciary" duty. A fiduciary is a person who holds something in trust for another. A PTA board is charged with holding the well-being of the PTA in trust for its members. The three legal duties are:

- **Duty of Care:** to pay attention to the organization's activities and operations
- **Duty of Loyalty:** to put the interests of the organization before personal and professional interests
- **Duty of Obedience:** to comply with applicable federal, state and local laws; adhere to the organization's bylaws; and remain guardians of the mission.

The descriptions below are a comprehensive list of the duties and responsibilities of PTA Board roles as they pertain to Alki Elementary PTA. As with any volunteer position, the most important thing is having a passion for serving the students, staff and families of Alki. Alki PTA's mission is to **support an engaged community that partners with our school to advocate for every child.**

### PRESIDENT / VP – EXECUTIVE OFFICERS – ELECTED POSITIONS

PTA President and Vice President should be thoughtful, respectful and great at communicating calmly even when faced with tough decisions or emergencies. When presiding over meetings the President remains impartial ensuring all voices are heard. The President supports all members of the Board in their duties and ensures that the PTA is cohesive in its messaging and initiatives. The President oversees all operations and is responsible for maintaining PTA best practices, open communication with Board members, school principals and staff as well as being a warm and welcoming presence for all families.

The VP can support the President in all duties and is an ideal candidate to step into the President position at the end of their one or two year term. While serving as VP they may consider fulfilling another Board role concurrently or focus on another area of responsibility in addition to shadowing the President.

**TIME COMMITMENT: Varies. 5 - 10 Hours per week. Sometimes more/less depending on meetings/events.**

#### **Annual Responsibilities:**

- Attend PTA Officer training and ensure elected officers attend training for their respective roles
- Become familiar with Parliamentary Procedure, WSPTA By-Laws and Alki PTA Standing Rules
- "Super Admin" in GSuite online record keeping and shared drives - ensure all Board members have proper access to shared drives and alkipta.com emails
- Facilitate transition meeting in Spring for outgoing and new officers
- Ensure 3 check signers on record at Chase Bank - Treasurer, President and one other Board member



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- Facilitate Board Summer Retreat to bond with board members, create welcome packet, establish a Board charter, and PTA plan for the year
- Ensure Standing Rules are shared with members and ratified in October with any updates or changes
- Support Treasurer in overseeing annual budget, Insurance Renewal, WSPTA Standards of Affiliation Agreement, Annual Corporation Report, Charitable Solicitations renewal and submitting Taxes
- Support Membership Chair in creating membership campaign and staying abreast of membership goals
- Support Communications Chair in submitting relevant articles for Enews, monthly newsletter, Social media and proofing/editing before publication
- Create a PTA Calendar of Events in conjunction with School Calendar with the Principal in Spring for the following year
- Ensure Board of Directors appointed roles are filled. When roles are vacant - work with Board members to shoulder responsibilities until role is filled
- Facilitate/create with the Board a PTA welcome packet communicating PTA mission, calendar of events, PTA Board and Chair persons contact list, fundraisers, and how to join PTA
- Participate in PTA Budget Committee – 2 or 3 meetings in late winter/early spring
- Ensure a Financial Review committee is selected in the fall for a mid year and end of year financial review
- Ensure a Nominating Committee is elected in the fall for seeking officer candidates for election in the Spring

### **Monthly Responsibilities:**

- Create General and Board meeting agendas with Board Secretary
- Moderate General and Board meetings or delegate to VP or another Board member if unable to attend
- Co-Sign expense checks, facilitate and co-sign contracts as needed for PTA programs, events, budget obligations
- Oversee Treasurer's PTA Budget report and keep abreast of bank account and actual income/expenses
- Meet with Principal to check in with needs, coordinate calendar and update Board members of new business

### **Weekly Responsibilities::**

- Check [alkipta@gmail.com](mailto:alkipta@gmail.com) and [president@alkipta.com](mailto:president@alkipta.com) emails and respond in a timely manner
- Check PTA PO Box at Alki Mail and Dispatch (or ensure another board member checks)
- Save all pertinent information in shared drive for Board access and future president



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### TREASURER – EXECUTIVE OFFICER - ELECTED POSITION

The Treasurer (supported by the President) is responsible for maintaining basic business operations and submitting required documentation by annual deadlines. The Treasurer should be comfortable working with spreadsheets and managing online banking. Organized record keeping (either electronically or scanned copies) is strongly encouraged and weekly availability to sign checks and make deposits is helpful. The Treasurer (supported by the President, Fundraising Chair and Events Chairs) is responsible for updating actual income/expense categories throughout the year and communicating PTA financial standings at monthly Board and General Membership meetings. The Treasurer leads the PTA Budget committee in bringing any new Budget requests to general membership for approval and establishing a viable budget for the following year based on historical trends of income/expenses and ensuring the PTA budget is in line with PTA's overall vision and mission statement.

**TIME COMMITMENT: Varies. 3-5 hours per week. Additional hours during budget committee season**

#### **WA State PTA Required Annual Action Checklist (currently completed by Treasurer):**

- Pay AIM Insurance premium (Annually by October 25th)
- Complete Federal Income Tax Return (990 EZ Annually by November 15th)
- Complete Business License Renewal (City of Seattle by December 31st)
- Send IRS Form 1099MISC to all independent contractors (Annually by January 31st)
- Complete Charitable Solicitations Act Registration & Annual Report (By May 31st)

#### **Additional Annual Responsibilities:**

- Attend PTA Officer Training annually
- Lead Budget Committee in establishing annual PTA budget aligning with school budget
- Maintain Chase Bank account and all PTA income accounts (ie: Square, PayPal, cc processing accounts, online fundraisers, etc.)
- Ensure annual subscriptions are set up for automatic payment or pay by due date
- Prepare treasurer records/files twice a year for independent financial review

#### **Monthly Responsibilities:**

- Generate Profit & Loss/Budget Updates and report at PTA Board and General Meetings
- Receive reimbursement requests and co-sign reimbursement checks to send via mail or deliver checks to school and/or PTA volunteers
- Keep record of all invoices/reimbursements/receipts
- Co-Sign contracts (with President or second Board member) and send checks for school grant needs, programs/facility use

#### **Weekly Responsibilities:**

- Check [Treasurer@alkipta.com](mailto:Treasurer@alkipta.com) email and respond in a timely manner
- Save all pertinent files in shared drive for Board access and future treasurers



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### SECRETARY – EXECUTIVE OFFICER - ELECTED POSITION

The Secretary position is an integral part of the Board in keeping the meeting minutes and working with the President in setting agendas that allow for chair reports, old and new business and pertinent motions to be made. The Secretary holds the organization's current Standing Rules, any addendums and keeps a record of all motions made in a year. Meeting minutes keep record of business discussed as well as action items that allow for all Board and/or general members to always have a reference as to what is happening and planned to happen within the organization. Great listening skills and concise note-taking are essential.

**TIME COMMITMENT: 3-5 hours/week**

#### **Annual Responsibilities:**

- Attend PTA Officer Training annually
- Keep and maintain a binder/folder (or electronic files) with the past 2 years of meeting minutes, Standing Rules, and any addendums to Standing Rules or other pertinent PTA documents/policies.

#### **Monthly Responsibilities**

- Create Board and General Meeting Agendas with President
- Provide sign-in sheet (or record the list of attendees at virtual meetings)
- Take minutes for all Board and General meetings - recording business discussed and motions made
- Provide minutes to Board members and general membership within two weeks of meeting date
- Provide copies of minutes for in person meetings or electronically for virtual meetings
- Review monthly bank statements checking for any variances, discrepancies and/or unusual activity
- Coordinate with President to check the PTA PO Box at Alki Mail and Dispatch

#### **Weekly Responsibilities:**

- Check [secretary@alkipta.com](mailto:secretary@alkipta.com) email and respond in a timely manner
- Save pertinent information in shared drive for Board member access and future Secretaries

### COMMUNICATIONS CHAIR – BOARD OF DIRECTORS - APPOINTED BY PRESIDENT/BOARD

The Communications Chair is the voice of PTA and responsible for facilitating Alki PTA communications including weekly Enews publications, the monthly printed newsletter, alkipta.com website, social media posts and printed event flyers. They are supported in their role by fellow Board members, events chairs and staff liaisons in providing pertinent content for publication. The Communications Chair should be positive, friendly, and informative to our



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parent community in all outgoing publications. PTA Communications Chair stays abreast of PTA and school news and plays a crucial role in keeping Alki families informed. Skill Set includes: strong communication and writing skills, basic understanding of graphic design, comfortable with website management, consistency and organization a plus! This position may be fulfilled by ONE person or each of the main communications channels (ie: website, Enews, Newsletter) could be managed by separate volunteers as long as the messaging is consistent.

**TIME COMMITMENT: Varies. 4-6 hours per week. Beginning of the month could be more with newsletter design and distribution**

#### **Annual Responsibilities**

- Attend PTA Training - not required but encouraged.
- Oversee all communications channels to ensure the messaging is consistent and cohesive
- Ensure alkipta.com is kept up to date with the current year's events and contacts
- Manage Constant Contact (Enews) adding and unsubscribing community members as needed

#### **Monthly Responsibilities (Newsletter)**

- Solicit contributors (Board, events/programs/fundraising chairs) for newsletter content
- Create newsletter to include monthly events, fundraisers, PTA thank yous, school news and other pertinent information
- Send to President (or Board) for proofing/editing prior to print
- Send final newsletter to Office Depot (PTA discount) for printing or arrange to have printed at school
- Arrange for newsletter (and any other Kid Mail flyers or PTA info) to be distributed in teacher's boxes at least 2 days prior to desired distribution date (first Wednesday of the month.)

#### **Weekly Responsibilities (Enews)**

- Solicit Board members, events/program/fundraiser chairs for E-News content prior to publication
- Create Enews and send to President (or the Board) for proofing/editing prior to publication
- Schedule Enews publication on same day/time each week (as much as possible)
- Post to PTA Facebook any pertinent events, reminders, updates (often several times a week)
- Monitor [info@alkipta.com](mailto:info@alkipta.com) email, as well as Facebook Messenger and respond to all inquiries in a timely manner
- Save pertinent information in shared drive for Board member access and future Communications Chairs



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### EVENTS CHAIR - BOARD OF DIRECTORS - APPOINTED BY PRESIDENT/BOARD

The Events Chair is a role that brings with it the opportunity to meet many of Alki's wonderful volunteers and families by overseeing and helping to facilitate all the PTA Sponsored Events throughout the year. The Events Chair is NOT responsible for coordinating ALL events, rather, they oversee and support volunteer event leads who may not be familiar with all the PTA resources and checklists in putting on a PTA event. The Events Chair is usually the Board member responsible for SPS Building Rental and reservations and reserving school spaces for PTA use. The Events Chair can also manage the Movie Licensing account and share streaming benefits with the community.

**TIME COMMITMENT: Varies depending on event frequency and demands. 2 - 3 hours/week.**

#### **Annual Responsibilities:**

- Attend PTA training - not required but encouraged
- Secure chairpersons for all PTA sponsored events and programs including but not limited to: welcome back events like popsicle social and kinder potluck, parent breakfasts, movie nights, BBQ's, Staff Appreciation Week, Running Club, Musical, etc.
- Support Event Chairs in communicating, planning and executing PTA events as needed and attending (or requesting another Board member to be in attendance) at all PTA events
- Support Event Chairs in managing the event budget and submitting reimbursement requests to treasurer in a timely manner
- Support Event Chairs in submitting budget requests for the following year
- Submit building use reservations in early fall for all PTA Event dates for the year

#### **Monthly Responsibilities:**

- Assist Event Chairs in submitting communications for newsletter, Enews and creating printed flyers for Kid Mail
- Assist Event Chairs in creating a signupgenius for events as needed
- Attend PTA Board and General meetings with announcements and updates about events
- Ensure any new ideas for PTA events/programs are brought to the Board and membership for consideration
- Submit movie streaming benefits for Enews/Newsletter publications

#### **Weekly Responsibilities**

- Check [events@alkipta.com](mailto:events@alkipta.com) email and respond in a timely manner
- Save pertinent information in shared drives for Board members access and easy transition for future Chairs



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### FUNDRAISING CHAIR – BOARD OF DIRECTORS – APPOINTED BY PRESIDENT/BOARD

The Fundraising Chair is responsible for managing the volunteers who coordinate the various fundraising activities that contribute to the budgeted income for the school year. The Fundraising Chair brings all proposed fundraisers to the board for approval before executing. Each fundraiser should also be included in the budget request for the year although some fundraising opportunities can be added during the year when approved by the Board and principal.

The Fundraising Chair is not fully responsible for managing all the initiatives but they must have visibility into each activity and assist where needed. They, along with the President and Treasurer will be account managers for all income sites, ie: Square, auction software, Gofundme, etc. They are the point of contact for all things 'income' and work closely with the Treasurer in providing income reports and tracking actual vs. proposed income goals.

**TIME COMMITMENT: Varies depending on time of year and level of facilitation needed. 3-5 hours/week. Considerably more investment if also Chairing a fundraiser like Auction or Alki-a-Thon.**

#### **Annual Responsibilities:**

- PTA Training - not required but encouraged - especially PTA & The Law to ensure being up to date on rules pertaining to raffles, banquet permits, fundraising limitations
- Secure Chairpersons for all PTA fundraisers included but not limited to: Auction, Alkiathon, Dine Outs,, Seasonal Fundraisers, Sporting Events, etc.
- Support Fundraiser Chairpersons in communicating, advertising, and executing fundraisers to achieve fundraising goals
- Support Fundraiser Chairpersons in managing budget, submitting reimbursements as well as ensuring event invoices, contracts, annual software subscriptions are provided to treasurer for recording and payment
- Assist Fundraiser Chairpersons in submitting budget requests for the following year

#### **Monthly Responsibilities:**

- Attend PTA Board and General Meetings and provide current fundraising updates
- Ensure any new fundraising initiatives are brought to Board for approval
- Support Fundraiser Chairpersons in submitting communications for Enews, Newsletter and creating printed flyers for Kid Mail

#### **Weekly Responsibilities:**

- Check [fundraising@alkipta.com](mailto:fundraising@alkipta.com) email and respond in a timely manner
- Save pertinent files in shared drive of fundraising resources, graphics, timelines and checklists



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### MEMBERSHIP CHAIR – BOARD OF DIRECTORS – APPOINTED BY PRESIDENT/BOARD

The Membership Chair is a great fit for an enthusiastic volunteer who likes finding new ways to engage families and exceed goals. The Membership Chair manages the online Member Planet account and tracks Alki PTA members and annual membership growth. They can facilitate a fall membership drive, invite staff to join PTA, and keep abreast of the latest member benefits to share with the community. They track paid dues (automatically received and submitted online) and report to the treasurer. They can work with the Board in facilitating new ways to inspire families to join and they can even reach out to neighboring PTA's to engage in friendly membership competitions between schools.

#### **Annual Responsibilities:**

- Attend PTA Membership Training - not required but encouraged
- Organize Back to School Membership Campaign and communicate via Enews, Newsletter, Social Media
- Manage the Member Planet account - updating current member info and purging old or irrelevant lists
- If needed - create/update Alki PTA Membership Form, manually enter new members, and submit any cash/check dues for deposit to treasurer

#### **Monthly Responsibilities:**

- Attend PTA Board and General meetings - provide updated membership report

#### **Weekly Responsibilities:**

- Check [membership@alkipta.com](mailto:membership@alkipta.com) email and respond in a timely manner
- Save pertinent information in shared drive for Board access and future membership chairs

### ADVOCACY CHAIR – BOARD OF DIRECTORS – APPOINTED BY PRESIDENT/BOARD

The Alki PTA Advocacy Chair works to inform Alki PTA members about issues; helps members understand the statewide legislative platform; empowers members to discuss local advocacy issues and helps members speak up when it matters most. The Advocacy chair represents Alki PTA at state and other local PTA events but no legislative experience is needed -- just a desire to get involved and help organize and advocate for our kids. Skill set includes: good written communication skills, must be able to present information in a clear, engaging, and non-partisan way. Good research skills, must be able to gather information from a variety of separate sources.

**TIME COMMITMENT: VARIES. 2-5 hours/week, depending on time of year and how engaged you want to be. An hour or so a week can make a big difference to the kids in Seattle Public Schools.**



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### Annual Responsibilities:

- Attend PTA Training - not required but encouraged
- Work with PTA Board in establishing an advocacy agenda for Alki PTA/ask members what their concerns are and what issues need solving
- Attend PTA Focus Day in Olympia (in January) and lobby for education bills
- Attend the WA State Legislative Assembly meeting in October
- Attend WA State PTA Convention

### Possible Monthly Responsibilities

- Reach out to other West Seattle Advocacy Chairs to build relationships
- Attend School Board meetings/School Board Director Community meeting
- Attend PTA Board and General meetings and help members stay current on the local and state issues that impact them.
- Submit relevant articles for Enews and Newsletter publications

### Possible Weekly Responsibilities:

- Check [advocacy@alkipta.com](mailto:advocacy@alkipta.com) email and respond in a timely manner
- Save all pertinent information in shared drive for Board to access and for future reference

### BUILDING LEADERSHIP TEAM PTA REP - BOARD OF DIRECTORS - APPOINTED BY PRESIDENT/BOARD

The Building Leadership Team (BLT) is a committee whose members include: the school Principal and staff representatives for all grade levels, administrators, and special teams in the building. This committee is the decision making task force for the building - guiding the decisions around curriculum, school programs, budget, staffing and anything that impacts Alki Elementary School. The BLT also includes a PTA Representative who attends monthly BLT meetings and reports back to the Board BLT business. The PTA BLT Rep also attends PTA Board and General Meetings to inform members of BLT Business and the general goings on at the school. **Time Commitment: 1-2 hours per week**

### BOARD MEMBER AT LARGE - BOARD OF DIRECTORS - APPOINTED BY PRESIDENT/BOARD

The Alki PTA Board Member at Large is a support role that often has past experience in PTA and/or at Alki Elementary. They can help to provide historical context around past PTA policies, budgets, changes in events and fundraisers. A historical perspective can be extremely beneficial to new Boards in understanding school climate and past successes as well as helping to avoid past pitfalls or recurring issues that new Boards may not be aware of. Board Members at Large can support PTA in other capacities concurrently if they choose; chairing an event, coordinating a fundraiser, and/or filling in where needed. **Time Commitment: 1-2 hours per week**