

HERITAGE PTO OFFICERS

• Heritage Elementary School•
updated 2021

P R E S I D E N T - O P E N

- Leads the PTO officer team with a positive attitude, poise, and the ability to make balanced decisions that unify the team.
- Serves as the point person for the Executive Board/Budget Committee.
- Chairs the board officer meetings, PTO general meetings and monthly PAC meetings at EPS.
- Works in partnership with the Heritage principal to grow opportunities and meet the needs for the school, teachers, and students.
- Establishes a schedule for yearly meetings.
- Prepares communications when needed to reach Heritage families regarding events and information.
- Works in partnership with the VP(s) on fundraising goals, events planning and execution.
- Stays on top of all key organizational dates, including the district calendar of events.
- Oversees board elections and nomination committee.
- Participates in any necessary PTO bylaw revisions and officer job descriptions.
- Works closely with Communications Secretary on all communication efforts.
- Serves as a spokesperson for Heritage PTO for school orientations, events etc.

V P / C O - V P - (1 - 2) O P E N

- Works in partnership with the President and Communications Secretary to develop and promote Heritage events throughout the year.
- Performs President's duties if he/she is absent or can not serve in the role.
- Serves on the Executive Board/Budget Committee.
- VP(s) coordinate, oversee, and assist in successfully executing fundraising events.
- VP(s) plan any necessary purchases for fundraising events. (Ex: Hero Hustle prizes)
- Delegates tasks to committee members as needed.
- Works with Communications Secretary on upcoming events (Ex: Hero Hustle, restaurant nights, Kendra Scott, spirit wear)

T R E A S U R E R

- Responsible for monthly bookkeeping and reconciliations of PTO's funds in account.
- Develop and present report at monthly PTO meetings.
- Create and maintain current PTO budget.
- She/he is responsible for collecting money at fundraising events and other designated events.
- Assists the Co-Treasurer with counting and collecting money to be deposited into PTO account.
- A majority of this job can be executed at home.

C O - T R E A S U R E R

- Serves as a responsible steward of PTO's money.
- Requires attention to detail, excellent organization, and proficient with numbers.
- Listed on PTO account signature card. Responsible for updating this card at the beginning of the year.
- Set up filing/organization system to keep record of monthly paperwork (reimbursements, payments, deposits etc.)
- Manages the following: PTO checkbook and writes the checks, manages petty cash for events, manages funds deposited into the school PTO safe.
- Makes deposits for the annual book fair.
- Works in partnership with the Treasurer as needed.

C O M M U N I C A T I O N S S E C R E T A R Y - O P E N

- Works in close partnership with the President and Principal on upcoming school events and information.
- Designs the weekly digital school newsletter. Heritage Principal provides information for the newsletter. The newsletter combines both school and PTO news.
- Monitors and updates all PTO social media platforms as needed: Heritage PTO Facebook page, Heritage YouTube channel, Heritage PTO webpage.
- Designs creative marketing materials as needed - flyers, posters, FB posts.
- Monitors and responds to emails on the PTO email account.
- Serves on the annual Budget committee.

R E C O R D I N G S E C R E T A R Y - O P E N

- Responsible for taking meeting minutes at the PTO meetings as well as important executive and budget committee meetings.
- Post meeting minutes monthly via Heritage FB page.
- Creates and distributes "Thank You" correspondence to sponsors, donors, etc. This also may include donation letters and requests.
- Coordinates and organizes volunteer sign-ups as needed.
- Creates annual PTO officer ballot for distribution.
- Serves on the Budget committee.