

Orangevale Open Parent Teacher Student Organization

Board Roles and Descriptions

Chair of the PTSO – Two Year Term July 1st

The Chair will have general supervision, direction, and control for the affairs of the PTSO and Board. They work with the PTSO Board and with input from the OVO Community to see how the PTSO can best support the OVO program. This is largely done through events, fundraising, treasury management, and maintaining organizational health. They facilitate both PTSO Board meetings and PTSO General Membership meetings. They serve as an Ex-officio member to all PTSO standing committees.

Vital Availability: It is important the PTSO Chair is able to field e-mails, phone calls, and text messages from members of the OVO community.

Useful Skills: Some experience facilitating meetings is helpful. Some comfort or willingness to learn how to use Mailchimp (group communications) and Wix (website management). Some experience in project management would be useful.

Time Commitment: Likely 5 hours a month, heavily weighted in preparation of Board or General Meetings in addition to attendance at special committee meetings. Additional time requirements depend on the chair's level of involvement in various events/fundraisers.

Tools Available: Organization by-laws that outline the governance structure of the PTSO. PTSO Chair Calendar and Handbook and an archive of previous meeting minutes. Some years the outgoing Chair may be available for assistance if they are a continuing parent.

Vice Chair (This section is in process of editing)

The Vice Chair will attend all meetings of the organization including the Board of Directors meetings. The Vice Chair will perform the duties of the Chair in his/her absence or at the request of the Chair. Vice Chair will assist Chair in the direction and control for the affairs of the PTSO and Board. Vice Chair may be called upon to act as Chair in the event the position becomes vacant. The Vice Chair will be an ex-officio member of the Programs and Activities Committee of the PTSO.

Vital Availability:

Useful Skills:

Time Commitment:

Tools Available:

PTSO Treasurer – Two Year Term July 1st

The PTSO Treasurer oversees all PTSO and Student Council related income, expenses, accounting and record keeping. They over-see the PTSO budget, income from fundraisers, file taxes and legal registrations required for a 501(c)3 non-profit, (Prior knowledge not required, there are forms, references and a paid accountant). They work primarily with the Student Council Treasurer and PTSO related reimbursement requests from staff and parents, as well as with the Head Grade Treasurer, PTSO Chair and Auditor (a PTSO Director) for double oversight, and as a team when needed. The Treasurer will be a Ex Officio Member on the Finance & Fundraising Committee of the PTSO. The Treasurer and the Head Grade Treasurer will work closely to complete the work of the PTSO.

Vital Availability: It is important the Treasurer can be on campus sometime during school business hours at least one day each week (8:15am to 4:00pm) to pick up, drop off and process paperwork and check requests. They can work with the Head Grade Treasurer if needed if they are unable to come to camps.

Useful Skills: Some accounting experience, able to create and balance a budget, keep and balance check ledgers, keep a good paper trail of all transactions. Some experience with spreadsheets, especially Microsoft Excel would be helpful.

Time Commitment: Likely 5 hours a month, heavily weighted to the end of the month. Additionally likely, 10 hours in August (setting up setting up bank accounts, filing taxes and non-profit registrations) and 10 hours in July (reconciling records and accounts, closing out the year).

Tools Available: A calendar of tasks and processes are available. PTSO employs an accountant for taxes. And works as a team with the Head Grade Treasurer. Some years the outgoing Treasurer may be available for questions if they are a continuing parent.

Secretary (This section is in process of editing)

The Secretary will keep a true and complete record of all the minutes of the PTSO and the Board and will have custody of any books and papers of account. Through the minutes, he/she will notify all members of the annual meeting and any special meetings at least one week (5 school days) prior to the meeting. The Secretary will perform such other duties as may be prescribed from time to time by the Board, including acting as signature authority on PTSO checks as requested by Chair. The Secretary will be an ex-officio member of the Hospitality and Outreach Committee of the PTSO.

Vital Availability:

Useful Skills:

Time Commitment:

Tools Available:

PTSO Head Grade Treasurer – Two Year Term July 1st

The Head Grade Treasurer oversees all grade funds as a clearing house for all grade income and expenses. The Head Grade Treasurer works with all Grade Treasurers as the Chairperson of the Grade Treasury Team. They manage all invoicing, reporting of income to the grades, and are the oversight for all checks and record keeping. The Head Grade Treasurer will be an Ex-Officio Member of the Finance and Fundraising Committee.

Vital Availability: It is important the Head Grade Treasurer can be on campus some time during school business hours at least one day each week (8:15am to 4:00pm) to pick up, drop off and process paperwork and check requests.

Useful Skills: Some accounting experience, able to create and balance a budget, keep and balance check ledgers, keep a good paper trail of all transactions. Knowledge of Spreadsheets, especially Microsoft Excel as well as experience with QuickBooks would be helpful.

Time Commitment: Likely 5 hours a month, heavy weighted to the end of the month. Additionally likely, 20 hours in August (setting up invoices, training grade treasurers, setting up bank accounts) and 15 hours in July (reconciling records and accounts, closing out the year).

Tools Available: A calendar of tasks and step by step processes in the Treasury Handbook and SOP, as well as the Treasury calendar. Some years the outgoing Head Grade Treasurer may be available for questions if they are a continuing parent.

PTSO Directors – Two Year Term July 1st

Directors of the PTSO carry out the work of the PTSO. Primarily through the organization, planning and execution of Events and Fundraisers at the school. Directors will lead one of three of the PTSO Standing Committees; 1) Programs and Activities, 2) Finance and Fundraising, and 3) Hospitality and Outreach, two directors are assigned to each Standing Committee. The Directors may be asked to lead any meetings held for special committees created for the purpose of fulfilling the OVO Program.

Vital Availability: It is important the directors are available to respond to committee members request for information. And if needed convey the information to the board for review. Be flexible with assignments to meet the needs of the PTSO, committees and school program.

Useful Skills: Ability to communicate with multiple groups of PTSO members. Lead volunteers in discussions and meetings. Further abilities will depend on which committee the Director is assigned to.

Time Commitment: Likely 5 hours per month. Time commitment could be greater depending on to which Standing Committee the director is assigned and the time of year. And which special projects are being organized and executed at the time.

Tools Available: Organization by-laws that outline the governance structure of the PTSO. Guidance of the PTSO Executive Board. Access to the PTSO DropBox for documents and flyers. Assistance of member volunteers of ad hoc and special committees.