

EXECUTIVE BOARD

Position Descriptions

Memorial Elementary PTO

Policy & Procedures Handbook — Volume I

10 Voting Positions | 1 Non-Voting Advisory

Updated: April 2026

How to Use This Document

Each role description is designed to stand alone — you can print or share individual pages for recruiting, onboarding, or reference. Every description follows the same format so it's easy to find what you need quickly. These descriptions are a starting point, not a contract. Roles evolve, circumstances change, and the best boards adapt. Update this document annually during the transition period.

Position	Vote	Time / Month	Reports To
President	Voting	18–24 hrs/mo	PTO Membership
Outgoing President	Non-Voting	6–10 hrs/mo	Alongside President
President-Elect	Voting	10–14 hrs/mo	President
Recording Secretary	Voting	6–10 hrs/mo	Leadership Team
Treasurer	Voting	12–19 hrs/mo	Board / Membership
Treasurer-Elect	Voting	5–8 hrs/mo	Treasurer
Communications Chair	Voting	10–14 hrs/mo	Leadership Team
Student-Led Fundraising Chair	Voting	10–16 hrs/mo	Leadership Team
Community Fundraising Chair	Voting	10–16 hrs/mo	Leadership Team
Volunteer Chair — Upper Grades	Voting	8–14 hrs/mo	Leadership Team
Volunteer Chair — Lower Grades	Voting	8–14 hrs/mo	Leadership Team

P	<p>President Executive Board Voting Member Leadership Team</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	PTO Membership	18–24 hrs/month	Year 2 of 3-year leadership commitment

ABOUT THIS ROLE

The President is the public face of Memorial Elementary PTO and the engine that keeps everything moving. You preside over meetings, serve as the main point of contact between the PTO and school administration, sign contracts, and make sure the whole organization is pointed in the right direction. You don't have to do everything — your job is to make sure everything gets done.

Why This Role Matters

A strong President sets the tone for the entire year. When parents and teachers see confident, organized leadership, they trust the PTO and show up. Your presence creates the foundation that every committee, event, and fundraiser builds on.

WHAT YOU OWN

- Preside over all General PTO Meetings and Executive Board meetings
- Prepare or co-prepare agendas with the Recording Secretary
- Keep meetings on track and on time
- Call for votes and document decisions
- Serve as the official representative of the PTO and its families to school administration
- Responsible for all direct communication with school administration
- Maintain regular standing meetings with the principal to align on PTO priorities, funding needs, and volunteering goals
- Represent parent concerns, priorities, and feedback to the principal and school staff
- Represent the PTO at school district or community events as needed
- Sign contracts on behalf of the PTO
- Oversee the health of the organization
- Monitor budget progress with the Treasurer
- Support all board chairs and ensure each team has what it needs to operate effectively
- Resolve conflicts and make judgment calls when needed
- Publish the annual PTO calendar in coordination with school administration by the first PTO meeting of the year
- Ensure the PTO operates in compliance with its bylaws and 501(c)(3) requirements
- Submit a written transition summary to your successor by June 30th

TEAM YOU LEAD

- President-Elect
- All Executive Board Chairs (Communications, Student-Led Fundraising, Community Fundraising, Volunteer Chairs)

WHAT SUCCESS LOOKS LIKE

- Meetings start on time, stay focused, and end with clear next steps
- Board members feel supported and know who to go to when they're stuck
- The principal and school staff see the PTO as a trusted partner, not an afterthought
- Parents feel informed and welcome to get involved
- Each team chair operates confidently within their area and has clear access to leadership support
- Your successor starts the year with everything they need and no mysteries to unravel

TOOLS & PLATFORMS

ParentSquare School communication platform	Google Drive Shared org documents & records	Email / Calendar Scheduling & correspondence	Square / Online Store Payments overview
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IDEAL FOR SOMEONE WHO...

- Has been involved with the PTO before (required — must have prior board experience)
- Is comfortable speaking in front of a group and running a meeting
- Thinks big picture but follows through on details
- Is a calm, steady presence — not easily rattled
- Knows how to delegate and let others shine

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
PTO Email Login	Credentials stored in shared password manager — transfer access to incoming President
Vendor & Contractor Contacts	Master contact list in Google Drive — update with any changes before handoff
Active Contracts	Note any multi-year or recurring contracts; flag renewal dates
School Admin Relationship Notes	Brief written summary of key relationships, ongoing conversations, and commitments made to the school
Annual Calendar Template	Updated calendar framework with recurring events already populated
Budget Overview	Walk through current year actuals with incoming President and Treasurer

Transition Summary Letter	Written summary of major decisions, lessons learned, and recommendations — due June 30th
Signing Authority	Remove from any vendor portals, bank authorization, etc. and add incoming President

OP	<h2 style="margin: 0;">Outgoing President</h2> <p style="margin: 0;">Executive Board Non-Voting Advisory Role Leadership Team</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Non-Voting — Advisory	Serves alongside current President	6–10 hrs/month	Year 3 of 3-year leadership commitment

ABOUT THIS ROLE

You just finished one of the hardest volunteer jobs at Memorial Elementary — and now you get to do it again, but easier. As Outgoing President, your job is to be the institutional memory and steady backstop for the current President. You know where the bodies are buried (figuratively). Share that knowledge generously.

Why This Role Matters

Every year, the PTO risks reinventing the wheel or repeating past mistakes simply because no one wrote things down. You are the living record of what worked, what didn't, and why certain decisions were made. Your presence on the board is one of the most practical things this organization does.

WHAT YOU OWN

- Serve as an advisor and thought partner to the current President — available for questions, guidance, and a second opinion
- Attend Executive Board meetings and General PTO meetings as a non-voting advisor
- Cast the deciding vote in the event of a tie among the voting members of the Executive Board
- Help onboard new board members, especially those in roles you may have worked closely with
- Assist with major transitions, especially if an unexpected vacancy occurs mid-year
- Complete and share your written transition summary if not already done
- Share key vendor relationships and contacts
- Share what you wish you'd known in year one
- Flag unfinished business or multi-year initiatives in progress
- Step back and let the current President lead — your role is to support, not to run things

WHAT SUCCESS LOOKS LIKE

- The current President feels like they have a safety net, not a shadow
- No major decision requires starting from scratch because the history is documented
- New board members feel welcomed and oriented quickly
- When the President asks 'did we try this before?' — you have an answer

TOOLS & PLATFORMS

Google Drive Shared records & transition documents	Email / Calendar Board meeting attendance	ParentSquare Stay connected with school comms
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IDEAL FOR SOMEONE WHO...

- Just completed their term as President (this role is automatic — no application needed)
- Is genuinely interested in seeing the next leader succeed
- Is good at sharing advice without taking over
- Has a little more bandwidth now that they're not running the show

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Final Transition Summary	If not submitted at end of President term, complete and file in Google Drive
Contact Introductions	Introduce incoming President to key school admin and vendor contacts
Historical Reference Files	Confirm all major event documentation, budgets, and decisions are in shared Drive and organized
Board Handoff	Ensure your successor in this role (if applicable) has what they need — or confirm the role concludes

PE	President-Elect Executive Board Voting Member Leadership Team
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	President	10–14 hrs/month	Year 1 of 3-year leadership commitment

ABOUT THIS ROLE

Think of this role as President in training — with real responsibility right now. You oversee the PTO’s committee system, serve as the primary backup to the President, and spend the year building the skills and relationships you’ll need when you take the top spot. You’re the connective tissue between teams — making sure coordinators and chairs have what they need and that nothing falls through the cracks.

Why This Role Matters

Continuity is what separates a good PTO from a great one. The President-Elect role ensures there’s always someone ready to step into the presidency who already understands how the organization works, has relationships with every part of the board, and can hit the ground running on day one.

WHAT YOU OWN

- Chair Executive Board meetings and General PTO meetings in the absence of the President
- Automatically assume the role of President if the President vacates the position
- Oversee the PTO committee system — ensure all teams are functioning, coordinators are supported, and escalations are handled
- Serve as the go-to leadership contact for chairs who need support, problem-solving, or a second opinion
- Co-manage the annual PTO calendar with the President
- Ensure major events are scheduled, staffed, and communicated in advance
- Identify conflicts, gaps, or overloaded stretches in the calendar and flag early
- Build working knowledge of all board functions in preparation for the Presidency
- Support the President on special projects, external relationships, and strategic planning
- Represent parent concerns and priorities to school administration alongside the President

WHAT SUCCESS LOOKS LIKE

- All team chairs feel supported and know where to go when they need leadership-level help
- You could step into the President role on short notice without skipping a beat
- The calendar is published on time and reflects realistic, achievable plans

- You have a working relationship with every board member and understand their challenges
- Coordinators across all teams know the committee system is well-managed

TOOLS & PLATFORMS

<p>Google Drive Event documentation & shared planning files</p>	<p>ParentSquare Communicating event details</p>	<p>Email / Calendar Chair check-ins & scheduling</p>
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IDEAL FOR SOMEONE WHO...

- Has served on the PTO board before in any role (required by bylaws)
- Is organized and good at supporting others through complex projects
- Enjoys mentoring and making sure nobody drops the ball
- Is ready to eventually step into the President role and excited about it
- Has time to be genuinely present — this is an active, visible role

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Committee System Overview	Notes on each team’s health, open coordinator positions, and any unresolved escalations
Event Documentation Folder	Confirm each major event has a folder in Drive with runbooks, vendor info, and post-event notes
Open Coordinator Positions	Note any roles that are unfilled or at risk for next year
Calendar Template	Hand off the working calendar with all known recurring events and dates pre-populated
Transition Summary	Written notes on what’s working, what needs attention, and recommendations for next year

RS	<h2 style="margin: 0;">Recording Secretary</h2> <p style="margin: 0;">Executive Board Voting Member Records Team Lead</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Leadership Team	6–10 hrs/month	Up to 2 consecutive years

ABOUT THIS ROLE

You’re the keeper of the official record. At every board meeting and general PTO meeting, you make sure decisions are captured, minutes are distributed, and the organization’s history is preserved in a way that someone new can actually use. You also lead the Records Team — the Photography, Yearbook, and Calendar Coordinators — ensuring the PTO’s visual history, school yearbook, and master calendar are well-managed alongside the written record.

Why This Role Matters

When experienced volunteers leave, the PTO loses institutional knowledge — unless it was written down (or photographed). Your minutes, notes, event records, and the visual archive your team maintains are how this organization learns from itself. Good documentation means the PTO gets smarter every year instead of starting over.

WHAT YOU OWN

- Prepare and distribute agendas for all Executive Board and General PTO meetings
- Coordinate with the President to finalize agenda items at least 48 hours before meetings
- Distribute agendas to board members in advance
- Record and distribute meeting minutes
- Take accurate notes during meetings capturing motions, votes, key decisions, and action items
- Finalize and distribute minutes within one week of each meeting
- Post approved minutes in shared Google Drive and on PTO website
- Maintain all official PTO records — digitally in Google Drive and in organized print copies as needed
- Maintain historical records for major events
- Collect and file event summaries, vendor notes, and lessons learned after each major event
- Ensure records are organized so anyone can find what they need without asking a person
- Lead the Records Team
- Oversee the Photography Coordinator — ensure event photos are captured, organized, and archived
- Oversee the Yearbook Coordinator — support yearbook production timeline and content collection

- Oversee the Calendar Coordinator — maintain the master PTO/school calendar, track event dates, and coordinate the printed calendar distributed by the school
- Assist with preparing materials for General PTO meetings (sign-in sheets, handouts, etc.)

TEAM YOU LEAD

- Photography Coordinator
- Yearbook Coordinator
- Calendar Coordinator

WHAT SUCCESS LOOKS LIKE

- Minutes are posted within a week of every meeting — every time
- When someone asks ‘did we do this before?’ the answer is in a document, not someone’s memory
- The shared Drive is organized and up to date — not a dumping ground
- Event photos are archived and accessible; the yearbook ships on time
- The master calendar is current, accurate, and available to all board members and families
- New board members can get up to speed by reading the records without needing a 2-hour phone call
- Meeting agendas go out on time and meetings feel prepared

TOOLS & PLATFORMS

<p>Google Drive Central records, minutes & documents</p>	<p>Google Docs Agendas, minutes, and summaries</p>	<p>ParentSquare Distributing minutes to membership</p>	<p>PTO Website Publishing approved minutes publicly</p>
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IDEAL FOR SOMEONE WHO...

- Is detail-oriented and follows through consistently
- Writes clearly and summarizes well — doesn’t need to capture every word, just what matters
- Is organized and actually enjoys keeping things tidy and filed
- Attends meetings reliably (this role requires being present)
- Comfortable with Google Drive and basic document formatting

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
<p>Master Records Folder</p>	<p>Confirm all minutes from the year are filed and named consistently in Google Drive</p>

Event Summaries	Ensure post-event notes and summaries are filed for every major event
Document Templates	Hand off agenda and minutes templates to successor
Website Login	Transfer access to any web platform where minutes are published
Pending Items Log	Document any unresolved action items from the final meetings of the year
Records Team Introductions	Introduce successor to Photography, Yearbook, and Calendar Coordinators and brief them on where things stand
Photo Archive Access	Ensure incoming Secretary has access to the photo archive and understands the filing system
Calendar Files & Contacts	Master calendar files, printing vendor contact, and distribution timeline

T	<p>Treasurer Executive Board Voting Member Financial Team Lead</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Executive Board / PTO Membership	12–19 hrs/month	Auto-assumed by Treasurer-Elect; up to 2 years

ABOUT THIS ROLE

The Treasurer is the financial backbone of the PTO. You manage the money, keep the books accurate, report finances to the board every month, file taxes to maintain nonprofit status, and build the budget that makes every event and program possible. You lead the Financial Team — the Treasurer-Elect who shadows you year-round, the Endowment Coordinator who manages the PTO’s long-term fund, and the Audit Committee that conducts the annual financial review. You don’t have to be an accountant — but being organized, detail-oriented, and trustworthy is non-negotiable.

Why This Role Matters

Without solid financial management, the PTO can’t do anything. Every dollar raised needs to be tracked, every expense authorized, and every stakeholder able to trust that the money is being handled with integrity. The Treasurer makes sure the community’s generosity is respected and well-stewarded.

WHAT YOU OWN

- Manage all PTO finances with accuracy and transparency
- Collect revenue and process payments via Square, checks, and online platforms
- Pay authorized expenses in a timely manner
- Maintain the checking account with dual-authorization controls
- Report financial activity monthly at Executive Board meetings
- Prepare a simple monthly report showing income, expenses, and running balance by category
- Flag any budget variances or concerns proactively
- Build and manage the annual budget
- Develop the proposed annual budget with input from board members
- Submit to the Board and newly-elected board no later than June 15th
- Track actuals vs. budget throughout the year
- File federal Form 990 and maintain all filings necessary to preserve 501(c)(3) status
- Facilitate an annual financial review or audit at year-end
- Maintain a minimum operating reserve of \$2,000 per bylaws
- Oversee and train the Treasurer-Elect throughout the year
- Support the Endowment Coordinator in managing the PTO’s long-term fund

- Coordinate with the Audit Committee to complete the annual financial review
- Post financials on PTO website and make available to any member upon request

TEAM YOU LEAD

- Treasurer-Elect
- Endowment Coordinator
- Audit Committee

WHAT SUCCESS LOOKS LIKE

- Every board member always knows roughly where the PTO stands financially — no surprises
- Bills are paid on time, reimbursements are processed quickly, and no vendor is waiting on a check
- Tax filings are submitted on time and the PTO retains its nonprofit status without drama
- The Treasurer-Elect could step in tomorrow with minimal disruption
- Year-end audit is clean, straightforward, and affirms the numbers are right
- The endowment fund is tracked accurately and reported to the board regularly

TOOLS & PLATFORMS

MoneyMinder Bookkeeping & financial records	Square POS system for events	PTO Online Store Membership dues & product sales	Google Drive Budget files, reports & filings	Bank Portal Account access & transactions
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IDEAL FOR SOMEONE WHO...

- Is organized, detail-oriented, and comfortable handling money responsibly
- Has basic bookkeeping or finance experience (not required, but helpful)
- Is comfortable with spreadsheets and financial reporting
- Is reliable — month-end reporting and tax filings have hard deadlines
- Communicates proactively when something looks off or a decision needs to be made

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Bank Account Access	Remove outgoing Treasurer; add incoming — requires coordination with bank and President
MoneyMinder / Accounting Files	Year-end books closed and backed up; login transferred to Treasurer-Elect
Square & Online Store Access	Transfer admin access; confirm all payout accounts are updated
Tax Filing Copies	All prior-year 990s and state filings filed in Google Drive

Budget Template	Current year budget file with actuals; template for next year
Vendor & Reimbursement Contacts	List of recurring vendors and any outstanding invoices or reimbursements
Audit Summary	Year-end review completed and filed before handoff
Endowment Fund Status	Current balance, investment details, and any pending actions for the Endowment Coordinator
Transition Briefing with Treasurer-Elect	Minimum 2-hour in-person or video handoff session before July 1st

TE	<h2 style="margin: 0;">Treasurer-Elect</h2> <p style="margin: 0;">Executive Board Voting Member Financial Team Succession Role</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Treasurer	5–8 hrs/month	1 year; auto-transitions to Treasurer

ABOUT THIS ROLE

The Treasurer-Elect is how the PTO makes sure it never has a financial leadership gap. You spend the year learning the books, supporting the Treasurer, and building a deep understanding of how the PTO’s finances work — so that when you step into the full Treasurer role, you’re not starting from zero. This is a great role if you’re financially inclined and want to grow into a bigger leadership position.

Why This Role Matters

Financial knowledge doesn’t transfer automatically when someone new takes over. The Treasurer-Elect role exists specifically to break that cycle — ensuring there’s always someone ready to take the reins who already understands how the money works.

WHAT YOU OWN

- Assist the Treasurer with bookkeeping, reporting, and budget tracking throughout the year
- Attend all Executive Board meetings to stay current on financial and organizational matters
- Shadow the Treasurer on tax preparation and financial review processes
- Be prepared to serve as acting Treasurer if the Treasurer is unavailable

WHAT SUCCESS LOOKS LIKE

- You could take over as Treasurer with one week’s notice and know where everything is
- The Treasurer is confident you could take over at any point during the year
- You attend all board meetings and financial reviews and can speak to the numbers
- You and the Treasurer are a cohesive team — no silos

TOOLS & PLATFORMS

<p>MoneyMinder Learning the books alongside Treasurer</p>	<p>Square / Online Store POS system for events; learn alongside Treasurer</p>	<p>Google Drive Financial documents, budget files & reports</p>
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IDEAL FOR SOMEONE WHO...

- Has interest in finance, accounting, or business administration
- Is organized and reliable
- Wants a meaningful board role with a natural path to more responsibility
- Is comfortable learning new software and financial tools
- Enjoys the satisfaction of keeping things balanced and organized

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Financial Systems Summary	Notes on all financial systems, login credentials, and processes you learned this year
Online Store Admin Access	Transfer to incoming Treasurer-Elect or Treasurer
Training Handoff Notes	Walk new Treasurer-Elect through every system used; document quirks and important notes
Open Financial Items	Any year-end financial work in progress, open vendor invoices, or unresolved reconciliation items

CC	<h2 style="margin: 0;">Communications Chair</h2> <p style="margin: 0;">Executive Board Voting Member Communications Team Lead</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Leadership Team	10–14 hrs/month	Up to 2 consecutive years

ABOUT THIS ROLE

You’re the voice of Memorial Elementary PTO. As Communications Chair, you make sure families always know what’s happening, when it’s happening, and why it matters — across every platform the PTO uses. You lead a team of four coordinators who each own a specific channel or function, and your job is to keep them aligned, on-message, and not duplicating each other’s work.

Why This Role Matters

Families who feel informed feel included. When communications are inconsistent, late, or overwhelming, parents tune out — and then they’re surprised by things and frustrated. A well-run communications team means higher event attendance, more volunteers, and a community that trusts the PTO.

WHAT YOU OWN

- Set and maintain the PTO communications strategy
- Establish a consistent voice, tone, and cadence across all platforms
- Create a communications calendar that aligns with the event calendar
- Set guidelines for what gets communicated, when, and through which channel
- Lead and support the Communications team
- Hold regular (or as-needed) check-ins with coordinators
- Review and approve communications before they go out as needed
- Help coordinators when they’re stuck or short on capacity
- Coordinate messaging with board members who need to communicate about their events or initiatives
- Manage the PTO’s primary email address and triage incoming messages
- Ensure all platforms (ParentSquare, social media, website, marquee) are updated and consistent
- Represent the Communications team at Executive Board meetings

TEAM YOU LEAD

- Digital Communication Coordinator
- Website Coordinator

- Marquee Coordinator
- Newsletter Coordinator

WHAT SUCCESS LOOKS LIKE

- Families consistently say they feel ‘in the loop’ about PTO activities
- Every major event has communications out at least 2 weeks in advance
- The team operates smoothly without you having to do everything yourself
- No two channels are saying different things at the same time
- The website, social media, and ParentSquare are all current and accurate

TOOLS & PLATFORMS

ParentSquare Primary family communications platform	Instagram / Facebook Public-facing community engagement	PTO Website Central information hub	Canva Graphics & promotional materials	Google Drive Shared content calendar & assets	PTO Email Inbound inquiries & outbound campaigns
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IDEAL FOR SOMEONE WHO...

- Has experience in communications, marketing, PR, or social media (even informally)
- Is a clear, concise writer who can match tone to audience
- Enjoys organizing and leading a small team
- Is proactive — doesn’t wait to be asked before flagging a problem or opportunity
- Has a feel for what families want to know and how to say it without overwhelming them

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Platform Logins & Access	All social, email, website, and ParentSquare credentials transferred to incoming Chair and relevant coordinators
Communications Calendar Template	Annotated calendar showing recurring communication touchpoints throughout the year
Brand & Style Guidelines	Any written or informal guidelines on PTO voice, fonts, colors, and imagery
Coordinator Roster	Contact list for all Comms team members with notes on each person’s strengths and availability
Content Library	Folder of past graphics, templates, and photos organized by event
Transition Notes	What worked, what didn’t, and what the incoming Chair should tackle first

SF	<h2 style="margin: 0;">Student-Led Fundraising Chair</h2> <p style="margin: 0;">Executive Board Voting Member Fundraising Team</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Leadership Team	10–16 hrs/month (higher during Fall Fest & Color Run)	Up to 2 consecutive years

ABOUT THIS ROLE

You lead the student-centered and event-based side of PTO fundraising — Fall Festival, Color Run/Boosterthon, Spirit Nights, Spiritwear, and School Supply sales. These are the programs families interact with most directly, and together they generate a significant share of the PTO’s annual revenue. Your job is to set strategy, support your coordinators, ensure every program hits its target, and keep the energy high without burning anyone out.

Why This Role Matters

Student-led fundraising is where the PTO connects most visibly with kids and families. These programs fund field trips, classroom supplies, enrichment, and more. A well-run student fundraising operation doesn’t just raise money — it builds school spirit and community pride.

WHAT YOU OWN

- Develop and execute the annual student-led fundraising plan in coordination with the Community Fundraising Chair and Treasurer
- Map out the student-led fundraising calendar — what events, when, and in what order
- Set realistic revenue targets for each program and track progress throughout the year
- Oversee Fall Festival financial operations and coordinate with the Fall Fest Coordinator on event logistics
- Lead the Color Run / Boosterthon relationship — manage the vendor partnership, set goals, and support school-wide participation
- Oversee Spirit Nights, Spiritwear, and School Supply coordinators
- Hold regular check-ins with coordinators to ensure programs are on track
- Help coordinators recruit volunteers and problem-solve as needed
- Ensure all student-led fundraising activities comply with 501(c)(3) requirements and PTO financial policies
- Coordinate with the Treasurer on revenue tracking, deposits, and reconciliation for all student-led programs
- Represent the student-led fundraising programs at Executive Board meetings and present updates
- Collaborate with the Community Fundraising Chair to ensure the full fundraising portfolio is balanced and strategic

TEAM YOU LEAD

- Fall Fest Coordinator (+ Fall Fest Committee)
- Spirit Nights Coordinator
- Spiritwear Coordinator
- School Supply Coordinator

WHAT SUCCESS LOOKS LIKE

- Student-led fundraising targets are met without over-relying on any single program
- Fall Fest is well-organized, well-attended, and hits its financial target
- Color Run / Boosterthon participation is strong and the vendor relationship is well-managed
- Coordinators operate confidently and know exactly what they own
- Families experience fundraising as fun and community-building, not exhausting
- The student-led and community fundraising calendars complement each other without overlap or fatigue

TOOLS & PLATFORMS

Boosterthon / Color Run Portal Student fundraising management	Square / Online Store Payments & merchandise	Google Drive Event docs, tracking sheets & budgets	Canva Event graphics & promotional materials	ParentSquare Fundraising announcements & campaigns
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IDEAL FOR SOMEONE WHO...

- Has experience in event planning, sales, or project management
- Is energetic and enjoys rallying a community around a shared goal
- Can manage multiple programs running simultaneously without dropping details
- Is comfortable working with vendors and negotiating partnerships
- Gets motivated by seeing tangible results — revenue targets met, kids having fun, families showing up

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Fall Fest Event Folder	Full event folder: vendor contacts, booth layouts, volunteer schedules, financial actuals, post-event notes
Boosterthon / Color Run Vendor Contact	Rep name, contract terms, and performance data from current year
Spirit Nights Schedule & Contacts	List of venues, contact names, and how each partnership was arranged
Spiritwear Files	Vendor info, inventory records, design files, and sales data
School Supply Coordinator Notes	Vendor contact, order timeline, and pricing history

Fundraising Calendar Template	Full-year plan with student-led events, deadlines, and revenue targets
Coordinator Transition Notes	Notes on each coordinator’s strengths, working style, and any open issues

CF	<h2 style="margin: 0;">Community Fundraising Chair</h2> <p style="margin: 0;">Executive Board Voting Member Fundraising Team</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Leadership Team	10–16 hrs/month (higher during Gala season)	Up to 2 consecutive years

ABOUT THIS ROLE

You lead the PTO’s signature fundraising event (the Gala), the annual family giving campaign, corporate and community sponsorship programs, and grant opportunities. This is the relationship-driven, high-dollar side of PTO fundraising — where long-term partnerships and donor stewardship matter as much as any single event. Your job is to set strategy, manage donor and sponsor relationships, and ensure these programs deliver sustainable revenue year after year.

Why This Role Matters

Community fundraising is what funds the PTO’s biggest investments — capital improvements, enrichment programs, and major teacher support. The relationships you build with sponsors, donors, and grant-makers don’t just raise money this year — they create a foundation for the PTO’s future.

WHAT YOU OWN

- Develop and execute the community fundraising strategy in coordination with the Student-Led Fundraising Chair and Treasurer
- Lead the Gala — set strategic direction, approve the budget and venue, and oversee the Gala Coordinator’s execution
- Review and approve the Gala auction strategy, sponsorship integration, and ticketing approach
- Attend key Gala planning milestones and help resolve issues that exceed the Gala Coordinator’s authority
- Set and execute the corporate and community sponsorship strategy
- Manage the sponsorship pipeline, donor relationships, and appreciation efforts
- Approve sponsorship packages and engage personally with the highest-level sponsors
- Review sponsorship performance and retention metrics quarterly
- Ensure the Family Giving & Corporate Sponsorship Coordinator maintains a current sponsor and donor tracker
- Oversee the fall Family Giving Campaign — approve strategy, giving levels, and campaign messaging
- Support the Grants Coordinator in identifying and pursuing high-value grant opportunities
- Review giving and grants performance metrics and report consolidated fundraising results to the board

- Attend key donor appreciation events and provide board-level access for top-tier sponsors as appropriate
- Ensure all community fundraising activities comply with 501(c)(3) requirements and PTO financial policies
- Represent the community fundraising programs at Executive Board meetings and present updates
- Collaborate with the Student-Led Fundraising Chair to ensure the full fundraising portfolio is balanced and strategic

TEAM YOU LEAD

- Gala Coordinator (+ Gala Committee)
- Family Giving & Corporate Sponsorship Coordinator
- Grants Coordinator

WHAT SUCCESS LOOKS LIKE

- The Gala meets or exceeds its revenue target and the community looks forward to it
- Major donors and sponsors feel valued and retention is strong year over year
- The family giving campaign grows participation and revenue annually
- Grant opportunities are identified and pursued systematically, not ad hoc
- Coordinators operate independently and keep their programs on track
- The full fundraising portfolio — Gala, giving campaign, sponsors, grants — grows revenue year over year
- The student-led and community fundraising calendars complement each other without overlap or fatigue

TOOLS & PLATFORMS

<p>Betterworld / Auction Site Gala auction & ticketing platform</p>	<p>Square / Online Store Payments & donations</p>	<p>Google Drive Sponsorship decks, event docs, tracking sheets</p>	<p>Canva Sponsorship packages & event graphics</p>	<p>ParentSquare Giving campaign announcements</p>
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IDEAL FOR SOMEONE WHO...

- Has experience in sales, development, event planning, or relationship management
- Is comfortable asking for money — diplomatically
- Builds trust easily and maintains professional relationships over time
- Can manage a portfolio of programs without losing sight of the big picture
- Is motivated by building something sustainable, not just hitting a number once

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Gala / Party Files	Full event folder: vendor contacts, venue contract, sponsorship roster, ticket sales data, post-event notes
Sponsor Contact List	All current and past sponsors with contact info, giving history, and relationship notes
Family Giving Campaign Files	Campaign materials, donor records, perk fulfillment tracker, year-over-year comparison data
Grant Applications & History	Any submitted or pending grant applications with deadlines and contact info
Fundraising Calendar Template	Full-year plan with community fundraising events, deadlines, and revenue targets
Coordinator Transition Notes	Notes on each coordinator's strengths, working style, and any open issues

VU	<h2 style="margin: 0;">Volunteer Chair — Upper Grades</h2> <p style="margin: 0;">Executive Board Voting Member Engagement Team Co-Lead Grades 3rd–5th</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Leadership Team	8–14 hrs/month (higher at start of year)	Up to 2 consecutive years

ABOUT THIS ROLE

You are one of two Volunteer Chairs who together lead the Engagement Team — the team responsible for connecting families to the school, building community, and making sure every event has the people it needs. For your half, you build and manage the Room Guardian network for grades 3–5, set up classroom communication channels, and coordinate volunteers for upper-grade activities. Together with the Lower Grades Chair, you co-lead the full Engagement Team: the coordinators who run teacher appreciation, parent engagement, Book Fair, Dad’s Club, Garden, After-School programming, and the 5th Grade Celebrations Committee.

Why This Role Matters

Events don’t run themselves. Behind every Fall Fest booth, every field trip chaperone, every classroom party is a volunteer who showed up because someone made it easy for them to say yes. That someone is you. And the Engagement Team coordinators who build community and keep families connected need a consistent, accessible point of contact on the board — that’s you and your co-chair.

WHAT YOU OWN

- Recruit and support Room Guardians for every 3rd–5th grade classroom
- Recruit at Meet the Teacher and Back to School events
- Provide Room Guardians with a clear role description and support throughout the year
- Check in with Room Guardians regularly and replace any who become inactive
- Set up and manage WhatsApp Community chats for each classroom in grades 3–5
- Create chats before school starts and add Room Guardians as co-admins
- Ensure chats are being used effectively for classroom-level communication
- Collaborate with PTO Communications or President for ParentSquare access
- Ensure 3rd–5th grade Room Guardians have ParentSquare class posting permissions
- Provide additional training on appropriate uses of ParentSquare and continued guidance
- Co-lead the Engagement Team (with Lower Grades Volunteer Chair)
- Serve as a primary board contact for Teacher Engagement, Parent Engagement, Book Fair, Dad’s Club, Garden, After-School, and 5th Grade Celebrations coordinators and committees
- Check in with Engagement Team coordinators regularly to ensure they have what they need
- Help coordinators recruit volunteers and problem-solve as needed

- Escalate issues to the Leadership Team when necessary
- Coordinate volunteer needs across all events for upper grades
- Work with event leads to identify volunteer needs ahead of each event
- Create and manage SignUpGenius forms or ParentSquare sign-ups for each event
- Send reminders and follow-up to ensure slots are filled
- Collect and verify VIPS (Volunteers in Public Schools) approvals from upper-grades families who want to volunteer on campus
- Collaborate with Volunteer Chair — Lower Grades on school-wide volunteer needs, Engagement Team coordination, and consistent processes
- Maintain a volunteer roster and track participation throughout the year

TEAM YOU LEAD

- Upper Grade Room Guardians (3rd–5th grade classrooms)
- Shared Engagement Team leadership (with Lower Grades Chair):
 - Teacher Engagement Coordinator
 - Parent Engagement Coordinator
 - Book Fair Coordinator (+ Book Fair Committee)
 - Dad’s Club Coordinator (+ Dad’s Club Committee)
 - Garden Coordinator (+ Garden Committee)
 - After-School Coordinator
 - 5th Grade Celebrations Committee

WHAT SUCCESS LOOKS LIKE

- Every 3rd–5th classroom has a Room Guardian in place by the third week of school
- Volunteer slots for events are filled at least one week before the event
- Room Guardians feel supported and connected — not dropped into a job with no guidance
- Engagement Team coordinators know exactly who to call when they need board-level help
- VIPS verification for upper grade volunteers is handled smoothly and doesn’t slow down event staffing
- Teachers feel genuinely appreciated throughout the year
- Families — especially those new to Memorial — feel welcomed and connected
- You and the Lower Grades Chair operate as a unified team with a consistent approach

TOOLS & PLATFORMS

<p>SignUpGenius Volunteer sign-up forms for events</p>	<p>WhatsApp Community Classroom communication channels</p>	<p>Google Drive VIPS records, event docs & planning files</p>	<p>ParentSquare School-wide volunteer recruitment posts</p>	<p>Google Sheets Room Guardian roster & volunteer tracking</p>
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IDEAL FOR SOMEONE WHO...

- Is organized, personable, and comfortable reaching out to people they don't know
- Is reliable about following up — volunteer coordination only works if someone keeps nudging
- Is comfortable building relationships in the upper grades parent community
- Enjoys connecting people to ways they can contribute
- Is comfortable with WhatsApp, Google Sheets, and SignUpGenius (or willing to learn)
- Cares about community-building, not just task management

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Room Guardian Roster	Full list of current Room Guardians by classroom with contact info and notes
WhatsApp Community Groups	List of all active group chats; instructions on how to transfer admin access
SignUpGenius Account	Login credentials; library of past forms that can be reused as templates
Engagement Team Coordinator Contacts	Contact info and status notes for all Engagement Team coordinators
VIPS Coordinator Contact	HISD VIPS coordinator contact info and any school-specific notes
Volunteer Participation Summary	Which families volunteered most, which events had hardest time filling slots, and what approaches worked best
5th Grade Celebrations Notes	Event plans, vendor contacts, grade-level account balance info

VL	<h2 style="margin: 0;">Volunteer Chair — Lower Grades</h2> <p style="margin: 0;">Executive Board Voting Member Engagement Team Co-Lead Grades PK–2nd</p>
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BOARD STATUS	REPORTS TO	TIME COMMITMENT	TERM
Voting — Executive Board	Leadership Team	8–14 hrs/month (higher at start of year)	Up to 2 consecutive years

ABOUT THIS ROLE

You’re the volunteer hub for the PK through 2nd grade community — often the families newest to Memorial Elementary and most eager to plug in. You build the Room Guardian network for the younger grades, set up classroom communication channels, and make it as easy as possible for those families to show up and help all year long. Together with the Upper Grades Volunteer Chair, you co-lead the full Engagement Team: the coordinators who run teacher appreciation, parent engagement, Book Fair, Dad’s Club, Garden, After-School programming, and the 5th Grade Celebrations Committee.

Why This Role Matters

Lower grades families are often the most enthusiastic new members of the PTO community. Getting them connected early builds the long-term volunteer base that the PTO depends on. A great experience in 1st grade means an engaged parent all the way through 5th.

WHAT YOU OWN

- Recruit and support Room Guardians for every PK–2nd grade classroom
- Recruit at Meet the Teacher and Back to School events
- Provide Room Guardians with a clear role description and support throughout the year
- Check in with Room Guardians regularly and replace any who become inactive
- Set up and manage WhatsApp Community chats for each classroom in grades PK–2
- Create chats before school starts and add Room Guardians as co-admins
- Ensure chats are being used effectively for classroom-level communication
- Collaborate with PTO Communications or President for ParentSquare access
- Ensure PK–2nd grade Room Guardians have ParentSquare class posting permissions
- Provide additional training on appropriate uses of ParentSquare and continued guidance
- Co-lead the Engagement Team (with Upper Grades Volunteer Chair)
- Serve as a primary board contact for Teacher Engagement, Parent Engagement, Book Fair, Dad’s Club, Garden, After-School, and 5th Grade Celebrations coordinators and committees
- Check in with Engagement Team coordinators regularly to ensure they have what they need
- Help coordinators recruit volunteers and problem-solve as needed
- Escalate issues to the Leadership Team when necessary

- Coordinate volunteer needs across all events for lower grades
- Work with event leads to identify volunteer needs ahead of each event
- Create and manage SignUpGenius forms or ParentSquare sign-ups for each event
- Send reminders and follow-up to ensure slots are filled
- Collect and verify VIPS (Volunteers in Public Schools) approvals from PK–2nd grade families who want to volunteer on campus
- Collaborate with Volunteer Chair — Upper Grades on school-wide volunteer needs, Engagement Team coordination, and consistent processes
- Maintain a volunteer roster and track participation throughout the year

TEAM YOU LEAD

- Lower Grade Room Guardians (PK–2nd grade classrooms)
- Shared Engagement Team leadership (with Upper Grades Chair):
 - Teacher Engagement Coordinator
 - Parent Engagement Coordinator
 - Book Fair Coordinator (+ Book Fair Committee)
 - Dad’s Club Coordinator (+ Dad’s Club Committee)
 - Garden Coordinator (+ Garden Committee)
 - After-School Coordinator
 - 5th Grade Celebrations Committee

WHAT SUCCESS LOOKS LIKE

- Every PK–2nd classroom has a Room Guardian in place by the third week of school
- New-to-Memorial families feel welcomed and quickly find a way to plug in
- Volunteer slots for events are filled at least one week before the event
- Engagement Team coordinators have consistent support from both Volunteer Chairs
- VIPS verification for lower grades volunteers is handled smoothly and doesn’t slow down event staffing
- Teachers feel genuinely appreciated throughout the year
- Families — especially those new to Memorial — feel welcomed and connected
- You and the Upper Grades Chair operate as a unified team with a consistent approach

TOOLS & PLATFORMS

<p>SignUpGenius Volunteer sign-up forms for events</p>	<p>WhatsApp Community Classroom communication channels</p>	<p>Google Drive VIPS records, event docs & planning files</p>	<p>ParentSquare School-wide volunteer recruitment posts</p>	<p>Google Sheets Room Guardian roster & volunteer tracking</p>
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IDEAL FOR SOMEONE WHO...

- Is warm and approachable — especially good with newer, less-connected families
- Is organized and consistent about following up
- Has or is building relationships in the younger grades parent community
- Is comfortable with WhatsApp, Google Sheets, and SignUpGenius (or willing to learn)
- Sees volunteer coordination as community-building, not just task management
- Cares about making families feel they belong at Memorial

YEAR-END TRANSITION CHECKLIST

What to Hand Off	Notes / Where to Find It
Room Guardian Roster	Full list of current Room Guardians by classroom with contact info and notes
WhatsApp Community Groups	List of all active group chats; instructions on how to transfer admin access
SignUpGenius Account	Login credentials; library of past forms that can be reused as templates
Engagement Team Coordinator Contacts	Contact info and status notes for all Engagement Team coordinators
VIPS Coordinator Contact	HISD VIPS coordinator contact info and any school-specific notes
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