**Secretary Responsibilities Timeline -** Tax ID #: 237257644

**August / September**

\*Get ready for MEMBERSHIP by picking a **theme**. Last year it was "Together we can make a difference....Become a member of our family tree" I made a goal to improve our membership numbers from the year before by 10% (Dana wanted me too☺). The year before was 209, so we made a goal to exceed 230. We got 232 so we got the Golden Acorn award. Get a staff list from Terri so you can make sure ALL staff have signed up for PTA membership.

\*Attend kindergarten and 1-4th grade **Open Houses** (for membership kick off).

-Have a table set up for membership at entrance in from of glass bulletin boards.

-I had a board from the PTA room that I put membership signs/info on (some extra are in vanilla folder)

-Membership forms (maybe I printed 100 for then? – use copy machine at school using PTA codes) & pens

-Have container/envelope to keep money in (maybe some change- I made it work without)

-School IPAD with Credit card reader ready to use (get from Casey/Dana)

-Credit Card Deposit Sheet copies (can get from PTA container in main office or online or binder (have maybe 5 sheets ready to use))

-Scissors to have them cut off top of form and take with them.

-Ideally, have 2 people for sign ups, one handling CC sign ups and one cash.

-CC person has the IPAD, Credit card reader, Membership forms/pens, and Credit Card Deposit Sheet. Run the card, fill out Credit Card Deposit Sheet, write cc on their membership form, cut off top for them to take. HAND OUT PTA CARD TO THEM right then! You don’t have to write their name on.

-Cash/check person has Membership forms/pens, another paper (to write names, cash amount on date signed up-helps keep order), envelope/container for money, cut off top for them to take with. HAND OUT PTA CARD TO THEM right then! You don’t have to write their name on.

-2014/15 we had 158 signed up after open houses alone so this is where most of it happens!

\*Make copies of Membership forms and put in all teacher mailboxes so all children get a form for their parents. You will then check PTA box in main office for those who return forms. These will be all cash/check and you will enter their info just as you did for others.

\*Make a **list of PTA Members** in Excel (Membership). Update this often and balance to make sure $ makes sense. A list of names is required to turn in with the Membership Cover Sheet. You will have the names, email addresses, phone numbers, addresses, kid’s teacher’s names in an Excel program. You also need to input the names and email addresses into the [secretary@arrowheadpta.org](mailto:secretary@arrowheadpta.org) email address that you will use to send out email blasts.

\***Deposit Cash/Checks** from membership sign ups with treasurer. Use Cash or Checks Deposit form (in pull out plastic box in office or online or in binder) to fill out and deposit. You can do this monthly or whenever you have time, but if you have the money, then you are responsible for it! You have to meet with Casey to do this, so call her or email her and do before or after meetings or set up a time to meet.

\*Membership Cover Sheet also needs filled out and turned into treasurer when you make a deposit. Balance the amount being deposited with the number of members ($5 = 1 member).

\***Monthly PTA meetings**:

Attend these meetings

Copies available of Previous month’s minutes for others to look over

Copy available of Sign In/Volunteer Log available for members to sign in, write volunteer hours on

Copies of PTA Motion forms ready for changes

Take notes during these

\***After PTA Meetings**:

Type up minutes, email to president for approval (and so she can put on website) within one week of the meeting.

Email BLAST out meetings minutes to all members emails you have.

Insert minutes into Secretary Binder followed by Motion Forms (if used that meeting) Sign In/Volunteer Log, Treasurers Report, Council Report and any other forms used during that meeting.

**October – December –** Continue to collect membership forms, add to list and email addresses at [Secretary@arrowheadpta.org](mailto:Secretary@arrowheadpta.org), turn info into treasurer, attend meetings and take notes.

**January**

\***Head Nominating Committee**.

-In January, 1st have all Board members fill out ½ sheet form letting you know their intentions (if they are considering being on the board next year).

-In January, start emailing all members and sending through backpacks forms for members to sign up for the Board positions for the following year. Anyone wanting considered needs to put this in writing (and let them know you want it in writing by FEB).

**February**

-Create Nominating Comm. by February. You will head this committee and also need 2 current board members and two general PTA members (it helps to have people who know others!).

-Meet (in person or via email) and determine slate (find people willing to serve in the positions) to be presented in March Meeting.

-If people have sent back forms showing they are willing, that is the easiest way, BUT you may have to start looking around for ideas. I used PTA sign in lists to get names and looked up their phone numbers and called to ask them. I also asked all on the committee again and again to give me names, then looked them up and called them.

**March**

-Present a list of names for the positions.

**April**

-Read the list during PTA meeting and have all Vote on the names.

**May**

\*Yearly report Volunteer Hours – Email all members asking for volunteer hours. Look at Meeting sign in sheets to get hours from there. President has a form for you to fill out and turn in.