

DUTIES OF OFFICERS:

Updated during PTO general meeting March 9, 2026

PRESIDENT/CO-PRESIDENT

1. Give curriculum night presentation to Lakewood community.
2. Set up 2 lecture/presentations per year of community interest.
3. The go-to person for information.
4. Liaison for parents and staff.
5. Schedule board and regular PTO meetings.
6. Prepare meeting agendas and preside over meetings.
7. Give notice to the community about upcoming events/meetings.
8. Coordinate PTO welcome packet at the start of the school year.
9. 1st week of school: meet with principal to create school year calendar.
10. Prepare PTO update for newsletter.
11. General planning with the principal, as needed.
12. Facilitate budget creation at first PTO meeting of the year.
13. Follow up on monthly action items at monthly PTO meetings.
14. Give Kindergarten Round-Up presentation to attending families.
15. Ensure the timely submission of the required tax forms by the Treasurer: IRS form 990-N due November 15th, Michigan Corporation Annual Report due October 1st, and Michigan form 5081 due February 28th. This task is a federal requirement following the loss, and latter reinstatement, of our 501 (c)(3) status in 2024 for failure to file. Failing to file these forms on time could jeopardize our non-profit status.
16. Monitor the main PTO email account: a2ptolakewood@gmail.com
17. Act as the second person on all financial accounts.

VICE PRESIDENT/CO-VICE PRESIDENT

1. Support the President in all functions.
2. Preside over meetings in the President's absence.
3. Ensure PTOC Representation.
4. Ensure maintenance of PTO Website and Social Media.
5. Participate in the annual audit held (preferably) in July.

SECRETARY

1. Record the minutes of all meetings. Track and record action items at each meeting.
2. Maintain permanent record of all minutes and correspondence written on behalf of the Board in shared Google Docs folder and posted on the PTO website after approval.
3. Send a copy of the minutes of the previous meeting to the PTO board members 1 week following a meeting.
4. Regularly check the PTO Mailbox.
5. Prepare materials and correspondences as requested by the PTO board.
6. Write thank you notes as needed on behalf of Lakewood for any donations to the PTO.
7. Write condolence cards and special acknowledgements as needed.
8. Keep time at meetings in order to keep the meeting on agenda and on track. Table items to discuss at end of meeting, if time allows, or to add the next month's agenda.
9. Act as liaison to local groups like the Sister Lakes Association and maintain regular sharing of information.
10. Maintain the organization of the PTO Google Drive (excepting Treasurer related documents)

TREASURER (Outgoing)

1. Deposit and administer all funds donated or received by the PTO in a timely manner.
2. Work closely with all executive board members in setting a budget.
3. Keep financial records of all PTO funds and report on such at monthly PTO meetings.
4. Work closely and follow up with all Lakewood staff members on budget items.
5. Regularly check the PTO treasurer's folder in the PTO mailbox and the treasurer's email: lakewoodptotreasurer@gmail.com.
6. Introduce budget to families at the 1st PTO meeting and make a year-end financial report at the final PTO meeting.
7. Maintain records and submit these records for an annual nonprofit tax return. This will usually include: an IRS form 990-N due annually by November 15 for the previous fiscal year, a State of Michigan Annual Report due annually by October 1 for the upcoming calendar year, a State of Michigan form 5081 due annually by February 28 for the previous calendar year.
8. Ensure the appropriate information is collected and filings submitted for raffle licenses and auctions.
9. Oversee the creation and maintenance of all PTO accounts (online: financial or otherwise), monitor the main PTO email account and ensure the transfer of these to the Incoming Treasurer upon leaving.

TREASURER (Incoming)

The Incoming Treasurer is a position that works with the Outgoing Treasurer to learn the software and responsibilities and then agrees to fill the Outgoing Treasurer's board position upon their leaving.

1. Seek out and identify opportunities to make or save money for the PTO aside from fundraising, such as: higher interest bank accounts, employer matching programs, and savings opportunities.
2. Work closely with all executive board members in setting a budget.
3. Operate a till during events in which money is exchanged and reconcile the earnings immediately afterwards.
4. Perform monthly account reconciliations with the Outgoing Treasurer.
5. Organize and participate in the annual audit committee (minimum of 3 participants) following the close of the fiscal year (July).
6. Familiarize oneself with tax and insurance policies.
7. Assist in introducing the budget to families at the first PTO meeting.

VOLUNTEER COORDINATOR/CO-VOLUNTEER COORDINATOR

1. Prepare, get translation for, and monitor volunteer signup sheets at the Meet and Greet, Curriculum Night and at other school events.
2. Coordinate any backpack mail or School Messenger requests for volunteers.
3. Find volunteers for various school events.
4. Communicate with PTO board about upcoming events and event needs.
5. Work with Fundraising Chair to promote Boxtop activities and Scrips.
6. Organize and run the Meet and Greet before school starts.
7. Organize and order lunch on the first day of school for the Lakewood staff.
8. Coordinate background checks for the board at the beginning of each year, and all volunteers prior to events when appropriate.

ADDITIONAL SUGGESTED ROLES DUTIES Not established by the bylaws:

FUNDRAISING COORDINATOR

1. Oversee Scrips and Box Tops
2. Manage any other PTO fundraising efforts throughout the year (ex: Restaurant nights, Schuler's weekend, Lizard Merch)
3. Step-in as lead co-ordinator in the absence of on for key events like the Fun Run, Read-A-Thon, and Summer Celebration.
4. Along with the Incoming Treasurer, seek out corporate giving matches and support parents in the process of listing Lakewood as a recipient of funds from their employers
5. Identify additional opportunities to raise money for Lakewood

REPRESENTATIVE

1. Be a voice for multicultural and multilingual families at Lakewood.
2. Communicate with families about PTO events and meetings and identify ways in which they can get more involved in these events.
3. Help to provide translation of PTO materials.
4. Organize regular “coffee hours” for our multicultural and multilingual families to meet with one another and with guest speakers of interest (such as: EL teacher, principal, social service agencies that support immigrants and refugees, cultural associations that represent diversity and other countries).
5. Find ways to represent different cultures around the school (ex: signs that say hello in different languages, posters of multicultural leaders, a theme day associated with different cultures).

COMMUNICATIONS LEAD

1. Maintain the Lakewood PTO Facebook group (or similar social media platform), or identify and oversee a volunteer to do so
2. Design event flyers, or identify and oversee volunteers who can do so.
3. Maintain the Lakewood PTO website, or identify and oversee volunteers who can do so
4. Look for opportunities to better communicate with our ESL families and ensure we are using all available tools at our disposal to do so consistently.