



## **Governance Team**

### **JOB DESCRIPTIONS**

October 2024

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## **EXECUTIVE COMMITTEE**

**The members of the Executive Committee shall:**

1. Perform duties as assigned by the president to achieve the goals of the state PTA.
2. Attend meetings of the Executive Committee, the Board of Directors, and specific committees when assigned.
3. Be responsible for proper procedure and confidentiality of privileged information.
4. Keep informed about state and national PTA projects, programs, and legislative activities and about the unit, council, region, and state structure.
5. Evaluate the need for standing and special committees. Recommend and submit to the Board of Directors for approval additions and deletions from the current list of standing committees.
6. Keep confidential all information regarding appointments of coordinators, region directors and specialists.

## **PRESIDENT**

### **The President shall:**

1. Be the Chief Executive Officer of the New York State PTA.
2. Serve as the spokesperson to the press/media for the organization.
3. Oversee the work of the State Office and the Executive Director.
4. Sign and execute all authorized bonds, stock certificates, mortgages, contracts, agreements, or other obligations in the name of New York State PTA.
5. Preside at all meetings of the Board of Directors, Region Directors and Specialists and the Executive Committee at which he/she may be present.
6. Select the dates for Executive Committee meetings and Board of Directors meetings in consultation with the Executive Committee.
7. On behalf of New York State PTA, engage a professional parliamentarian to serve at such meetings as he/she may deem necessary or desirable.
8. Prepare, with input from the Secretary, an agenda for all Executive Committee and Board of Directors meetings.
9. Appoint auditors of minutes for Executive Committee, Board of Directors and Region Directors and Specialist meetings.
10. Speak at the Legislative Summit, Summer Leadership Conference, and other conferences as requested.
11. Assign duties and areas of responsibility to officers, the immediate past president, and consultants, and oversee the coordination of the work of the officers, the region directors, the chair of standing committees, the chair of special committees/task forces, and the New York State PTA office.
12. Appoint all special committee chairs, except those for which other provisions are made, and fill vacancies in chairmanships of standing committees with the approval of the Executive Committee. Appoint task forces and consultants, no more than four consultants.

13. Announce the order of presiding at the Post-Convention meeting; to follow this order and to include: President, First Vice President, and remaining Vice Presidents in order of longevity, Secretary and Treasurer.
14. Sign, charters, and credential cards for delegates to the state and national conventions, along with the Secretary, if applicable.
15. Sign honorary life membership cards and memorials.
16. In cooperation with Designated Officers and consultants, approve materials that are to be sent to those beyond the Board of Directors, with the exception of those materials being emailed by coordinators to their counterparts.
17. Oversee the sending of required information and data of the New York State PTA to National PTA for its records.
18. Serve as the representative of the New York State PTA on the National Constituent Associations Advisory Council.
19. Appoint delegates to National PTA convention in consultation with the Executive Committee.
20. Immediately following the election of a successor, see that the Operations/Events Manager sends announcements of the name and address of the successor to members of the National PTA, educational groups, and other agencies with which the state PTA cooperates.
21. If available, sit on the Educational Conference Board as a representative for PTA.
22. For Convention:
  - a. Preside at convention
  - b. Engage a professional parliamentarian on behalf of New York State PTA
  - c. Appoint two auditors
  - d. Arrange for the Call to Convention to be sent to the Board of Directors and Governance Team members
  - e. Prepare guest list for convention
  - f. Provide the State Office and the Secretary with the names of special guests for banquet, luncheons, and dinners
  - g. Approve banquet seating arrangements
  - h. Send to National PTA the annual convention report, including the president's annual report, names, addresses and telephone numbers of

new state board members and term of office of the new president and officers when elected

23. Be the ex-officio of all committees except the nominations and elections and audit committees.
24. Submit articles to NYPT and GT Our Way.
25. Write a letter of recognition for service on the Board of Directors to anyone leaving the board.
26. Write a letter of recommendation for the Youth Members upon their request.

## **SECRETARY**

### **The Secretary shall:**

1. For meetings:
  - a. Have at all meetings a current copy of the bylaws, procedures, job descriptions and *Robert's Rules of Order, Newly Revised*.
  - b. Take attendance by roll call at meetings of the Executive Committee, Board of Directors and Region Directors and Specialists, establishing that a quorum is present.
  - c. Send to the president immediately after all meetings a list of approved items for action and of unfinished business.
  - d. Send the draft to the auditors for their review and verification within ten (10) days following a meeting with a note requesting return of minutes within ten (10) days. Carbon copy the president on all correspondence.
  - e. Post on the NYS PTA data system the proposed meeting minutes at least ten (10) days prior to the regular scheduled meeting.
  - f. Prepare an action item document of the approved actions taken at the Executive Committee and Board of Directors meeting to be approved by the President, posted on the NYS PTA data system and announced in the governance team newsletter.
  - g. Working with the Executive Director, see that copies of Executive Committee minutes for the fiscal year go to the professional auditors.
  - h. Present Executive Committee recommendations and actions to the Board of Directors.
2. Assist the President in preparing an agenda for the Executive Committee, Board of Directors and Region Directors and Specialists meetings.
3. Sign, with the president, credential cards for delegates to the state convention, the Call to Convention, and other official documents as required.
4. Respond to correspondence and telephone calls quickly and accurately.
5. Serve at the request of the president as recording secretary for committee meetings and workshops.
6. Prepare the calendar for the following year. Present proposed calendar at the mid-year Executive Committee meeting.
7. See that the Personal Profile, Committee Selection, and Interest Profile sheets are emailed to all members of the governance team with a deadline in early May. Compile the information and post it to the NYS PTA data system.

8. For Convention:
  - a. As chair of the Convention Rules Committee:
    - i. Prepare proposed convention rules with assigned committee to be approved at the summer Executive Committee meeting.
    - ii. Present the committee's report to the Executive Committee
    - iii. Send copies of the Proposed Convention Rules to the state office and the Convention Coordinator after the summer Executive Committee meeting
    - iv. Present the Convention Rules Committee report to the delegates for approval
  - b. Call to Convention:
    - i. See that the Call to Convention is distributed 30 (thirty) days prior to convention
    - ii. Read the Call to Convention at the opening session of convention.
  - c. Notify potential candidates (not nominated by the nominating committee) of procedures to be followed as outlined in the Board of Directors procedures
  - d. Ensure that the state office orders:
    - i. Plaque for retiring officers
    - ii. National PTA Honorary Life Achievement for newly elected President, if he/she has not been so honored previously
    - iii. Past President's pin for retiring President
    - iv. New York State Honorary Life award for the spouse/partner of the retiring President, if he/she has not been so honored previously
  - e. Perform other convention duties as outlined in the Convention Guidelines
9. For Nominating Committee:
  - a. The Secretary shall post a list of those eligible to serve on the least two weeks prior to the meeting.
  - b. At the board meeting, the secretary shall provide enough ballots for election of the Executive Committee, Board of Directors and Region Directors and Specialists as indicated in the bylaws and the nominating committee for election of the chair.
  - c. Refer to the NYS PTA Bylaws and Board of Directors Procedures for rules and process for the election of the nominating committee.
10. Provide the nominating committee chair a list of those eligible for election to office.
11. Maintain an ongoing record of the service of each member of the governance team including name, positions held, date(s) of appointment and/or election to office.

12. Work with the state office to see that packets and materials from conferences and meetings are sent to those invited but not in attendance.
13. Ensure that the adopted procedure amendments are incorporated, as stated in the Board of Director's Procedures.
14. Oversee the update of any and all documents necessary at the request of the President and/or Executive Committee, including the Job Descriptions document to be adopted by the Executive Committee.
15. Send a list of appointments of Coordinator/Youth Member(s)/Region Directors/Specialists with their names and addresses to the state office no later than December 15 or March 15 as appropriate for distribution to the Board of Directors.

## **TREASURER**

**The Treasurer shall:**

1. Register the president's and designated signatures in all banks used by New York State PTA for checking and interest-bearing accounts.
2. Monthly:
  - a. Review the accuracy of the deposits and withdrawals of fund and interest-bearing accounts.
  - b. Revise the recording of salaries paid to the office employees and review payment of all federal and state withholding taxes, social security, disability insurance and health insurance.
  - c. Prepare and make available on the NYS PTA data system monthly financial and budget reports to the Governance Team members and appropriate chairs.
3. Present financial statements and the status of the budget to the Executive Committee and the Board of Directors.
4. Present the current budget for amendment to the Board of Directors for approval at the mid-year board meeting if necessary.
5. Using the accepted formula for computation of region allotments and determine the monetary allotments for all regions.
6. Present an annual summary to the Executive Committee for approval, to the Board of Directors for adoption, and to the delegate body at convention for its information.
7. Arrange for insurance and bonding.
8. Submit to the National PTA:
  - a. The National share of dues receipts in accordance with National PTA procedures
  - b. Its share of Founders Day receipts
  - c. The treasurer copies of the auditor's report and IRS Form 990 as filed
9. Review vouchers approved by the Designated Officers from members of the Governance Team and pay the same.
10. Pay expenses incurred by persons filling special assignments after approval by the president.

11. Invest savings account funds in certificates of deposit or other legal investments as directed by the Executive Committee and/or the Board of Directors.
12. Maintain in separate accounts and disburse funds from these accounts upon proper order:
  - a. the New York State PTA Jenkins Memorial Scholarship for Teacher Education Fund
  - b. New York State PTA Teacher Fellowship for Graduate Study – In Memory of Richard Gazzola Fund
  - c. PARP Fund
  - d. Building Fund
  - e. Empire State PTSA Fund
13. Maintain a Twin Projects Fund in a separate account and:
  - a. Determine, with the DO of Awards, the number of scholarships and fellowships to be awarded based on monies received to the fund in the prior year
  - b. Inform the Twin Projects Chair at the summer meeting of the number of scholarships and fellowships to be awarded
14. Review an annual inventory of state property maintained by the State Office.
15. Be notified by the chair of all live committee meetings with the names of those attending, the date and location of the meeting.
16. Be notified of all field service assignments by the Designated Officers of Region Directors and Chairs.
17. Receive and audit all bills for state meetings and prepare a cost analysis for the Executive Committee.
18. Keep regions up to date on units which have not paid the insurance fee.
19. Compile reports and send all books and records to the auditor for audit as of June
20. Serve as the resource for:
  - a. PTA insurance, sales tax, and tax exemption information
  - b. The proper way to handle fundraising events
21. Assist in cooperation with the Operations/Events Manager, the preparation of a preliminary statistical and financial report for every major PTA event (Summer Leadership, PARP, Convention, Leg Summit and Orientation) to be

presented within 60 days of the event, with the final report to be completed upon receipt of all accurate vendor bills.

22. Participate in the Strategic Planning Committee.

Treasurer's Duties for Convention

23. As convention registration chair:

- a. Arrange registration facilities by consulting with:
  - i. office staff regarding their role
  - ii. regions concerning number of persons from host region(s) required to assist with registration
- b. Notify Convention Coordinator of equipment and personnel needed for registration
- c. Prepare and provide Pre-Registration Report Form and instructions for Region Pre-Registration Chair and Region Directors. Inform Region Pre-Registration Chair of the number of voting delegates to which each unit is entitled
- d. Prepare the following materials for convention mailing to units, councils, and regions:
  - i. pre-registration form for delegates
  - ii. list of region pre-registration chairs
  - iii. general information for delegates (confer with convention coordinator)
- e. Order through the state office before August 1 identification badges, credential cards, voting cards and envelopes
- f. Ensure that region pre-registration chairs are provided with extra credential cards, pre-registration blanks and hotel reservation forms
- g. Secure safe deposit box or safe at convention site with executive administrator
- h. Prepare a report of the total number of voting delegates for the elections chair

24. As convention credentials chair:

- a. Prepare credentials report to include:
  - i. Number of voting delegates
  - ii. Number of non-voting delegates
  - iii. Number of regions represented
  - iv. Number of guests
  - v. Number of exhibitors
  - vi. Total attendance
- b. Give credentials report to convention body at the:
  - i. opening day of convention immediately following the reading of the convention rules

- ii. opening of each session
- iii. Provide copies of final credentials report to the president, the secretary, and the meetings manager

25. Prepare a report of registration as soon as possible after convention (copies to president, secretary, meetings manager) for presentation to Board of Directors at the mid-year meeting.

26. Present a convention financial report to the Board of Directors at the mid-year meeting.

## OFFICERS

### OFFICERS shall:

1. For Coordinators/Youth Member(s)/Region Directors/Specialist appointments:
  - a. At the post-convention meeting present recommendations for Resolutions Coordinator.
  - b. At mid-year meeting, review the Leadership Development committee recommendations for Coordinators, Youth Member(s), and Specialist(s)
  - c. At the mid-year meeting, review the recommendation received by the Designated Officer of Field Service Coordinators/Region Directors.
  - d. Notify the executive committee of positions filled within two weeks of appointments.
  - e. The President will contact those not reappointed. The State Office will send a follow-up letter, to thank them for their service.
  - f. Assure annual photos are taken at Orientation and, in coordination with the secretary, Personal Profile, Committee Selection and Interest Profiles are submitted.
  - g. Plan and conduct an annual orientation for all members of the Governance Team in cooperation with the Orientation Coordinator.
  - h. Arrange for transfer of all materials at the appropriate time.
  - i. Periodically review each coordinator and specialist progress with him/her in accordance with Board of Directors Procedures.
2. Maintain a file of approved team plans of work.
3. Ensure that job descriptions of all Governance Team positions are updated annually before orientation, or as appropriate, and that updates are posted on the NYS PTA data system.
4. Communicate with coordinators by mail/phone periodically as needed and specialists when necessary.
5. Notify the treasurer of all field service assignments of state coordinators, if applicable.
6. Send approved form to attend workshops/conferences to the treasurer.
7. Notify coordinator when a report is due and the desired format for submission of that report.

8. Encourage coordinators and specialists to write articles for all NYS PTA publications and social media networks.
9. Approve any car rental/air travel of coordinators and specialists.
10. Approve all expenditures over \$50 (fifty) not specifically approved in the team or committee plan of work.
11. Ensure that the Job Description document is updated whenever a change occurs.

## **Designated Officer**

### **Designated Officer shall:**

1. Oversee assigned team:
  - a. Be responsible for monitoring the budget and tracking the expenses of assigned budget lines
  - b. Be responsible for monitoring actions of the team members to ensure consistency with approved team plan of work and overall mission of NYS PTA
  - c. Keep up-to-date file on the team members
  - d. Serve as an ex-officio member of standing committees assigned to their team
2. Welcome new team members, making sure they have received appropriate files of their predecessor with a copy of the previous team plan of work.
3. For Team plans of work:
  - a. Prepare with the team a new plan of work each year
  - b. Present the Team plan of work at the designated Executive Committee meeting as stated in the procedures
  - c. Notify the team of the disposition of these plans of work after the Executive Committee meeting
  - d. Place approved plan of work on the NYS PTA data system
  - e. Periodically review the progress with the team
4. Review and approve materials to be distributed by the state office, i.e., flyers, applications, etc.
5. Review and approve documents, articles and workshops/webinars.
6. Review statements/testimony to be given by team members and forward such to the President for final approval.
7. Review letters (i.e. award letters/contracts) to be sent by the PTA Office and forward such to the President for final approval.
8. Communicate regularly with the Coordinators and/or team members
9. Request reports from team members attending conferences, meetings or hearings representing NYS PTA
10. Carbon copy Designated Officer for Field Service Coordinators/Region Directors when work of team members affects region directors

11. Approve all travel by air, car or train, car rental and/or hotel, if applicable, prior to any events
12. Request approval for own air travel or car rental from president
13. Ensure that website has the most current information
14. Encourage the team to maintain, update or create new materials relating to their area.

**Designated Officer of Advocacy shall:**

1. Oversee Legislative Summit.
2. Coordinate with the Executive Director the flow of information between outside organizations/agencies and the members of the Advocacy Team.
3. Provide advice and expertise to the members of the Advocacy Team as needed.
4. Provide assistance and information for advocacy communications, Legislative Briefs and/or PTA Alerts.
5. Coordinate state and federal legislation, or if a coordinator of federal legislation has been appointed, work with him/her to coordinate all advocacy efforts.

**Designated Officer of Awards shall:**

1. Work with the Awards team and assigned staff members to create new awards.
2. Work with the Awards Coordinator to oversee the responsibilities of the Recognitions Specialist.
3. Work with the Awards Team to review Awards Process Book as needed.
4. Report to the Executive Committee all awards information, as required by the BOD Procedures.

**Designated Officer of Bylaws shall:**

1. Approve all modifications to the online bylaws system and all guidance documents associated with the use of the system
2. Approve all amendments from the Bylaws Committee to be sent to the President for final approval by the Board of Directors

**Designated Officer of Diversity shall:**

1. Encourage and promote efforts to integrate diversity and inclusion into the work of NYS PTA at all levels of the organization and across all areas of the state
2. Help to coordinate training in diversity and inclusion for the Governance Team
3. Participate along with the Diversity, Equity and Inclusion Committee, in the judging of the Diversity, Equity and Inclusion Award

**Designated Officer of Family Engagement shall:**

1. Encourage and promote efforts to integrate family engagement into the work of NYS PTA at all levels of the organization and across all areas of the state
2. Facilitate efforts to work with Governance Team members to help units seek out new opportunities to engage families.
3. Support and promote statewide implementations of PTA family engagement initiatives and National PTA Family-School Partnerships Standards and support the adoption and implementation of the NYS Family Engagement Standards.
4. Collaborate with the Family Engagement Coordinator to review and update the Family Engagement Toolkit.

**Designated Officer of Field Support shall:**

1. For Region Director appointments:
  - a. Work with the Designated Officer of Leadership Development on the Region Director Recommendation form.
  - b. Create a list of eligible region director candidates for appointment
  - c. Report the results of the recommendations to be filled by the Executive Committee at the mid-year meeting
  - d. Notify Executive Committee of positions filled and any vacancy positions

- e. Send a list of appointments of region directors with their names and addresses to the secretary no later than March 15
- f. Notify region directors of the names and addresses of their successors
- g. Plan and conduct training for region directors in consultation with the Field Support Coordinators
- h. Arrange for transfer of all materials at the appropriate time
- i. Periodically review each region director's progress with the input of the Field Support Coordinators, in accordance with Board of Directors Procedures

2. Work with the President to assign each Field Support Coordinator to the appropriate regions
3. Facilitate the work of the Field Support Coordinators:
  - a. Conduct monthly/bi-weekly meetings with the Field Support Coordinators, as necessary
  - b. Work with the Field Support Coordinators to prepare agenda for Field Team meeting and training workshops for the Region Directors at designated events.
  - c. Work with Field Support Coordinators to prepare orientation outlines and/or virtual training for region boards
4. Keep an accurate file on each region in each of the following areas:
  - a. monthly reports
  - b. bylaws
  - c. budgets
  - d. annual reports
  - e. treasurer's reports
5. Conduct monthly Field Team meetings
  - a. Provide the most up-to-date information from the Executive Committee
  - b. Provide reminders for upcoming events
  - c. Invite members of the GT to share updates, timely information relevant to the field
  - d. Address any issues necessary
  - e. Include reports from the assigned office member, Outreach Coordinator and/or Field Support Coordinators
6. Review and approve all Field Service Request(s) by Region Directors for state representatives. Confirm that the state representative(s) is/are available. Make sure a copy of the approved request is sent to all listed on the form.

7. Obtain NYS PTA Greetings for Presidents/Principals events as well as Installation ceremonies from the President.
8. Review, approve, and process "Request to Drop a Unit/Council" forms as received from region directors as per Board of Directors procedures.
9. Approve requests for waivers for insurance, membership, bylaws along with the President. Send the approved waivers to the State office for processing.

**Designated Officer of Leadership Development shall:**

1. With the Leadership Development Committee, plan and provide leadership workshops on a statewide basis.
2. Facilitate efforts to provide leadership training as requested by regions, in consultation with the Leadership Development Coordinator, the Leadership Training Specialist, the Field Support Coordinators, and their Designated Officer, particularly through regional training.
3. Coordinate with the Leadership Development Committee the recruitment, review, and recommendation to the Executive Committee of appointments of Coordinators, Specialist and Youth Member(s).
4. Participate, along with the Leadership Development Committee in the judging of the Leadership Award in Honor of Jane Skryzpek
5. Work with the Leadership Development Team to tailor leadership development programs to meet specific current needs.
6. Encourage the use of NYS PTA media by regions to share their leadership materials and techniques with other regions throughout the state and keep a file of region leadership or development programs, materials, and techniques on the NYS PTA data system.
7. Propose general improvements in leadership approaches, problem solving and planning procedures as needed.
8. Plan with the Leadership Development Committee for Board of Directors or Governance Team leadership training attached to Board meetings and through online training.
9. Facilitate the Leadership Development Committee's periodic evaluation of state Leadership Awards Program determine any changes or replacements.

10. Facilitate the maintenance of workshop materials used in designated mandatory or elective workshops attached to NYS PTA Leadership Awards Program.
11. Supervise the initial study of any newly proposed leadership awards and recognitions.

**Designated Officer of Membership shall:**

1. Approve membership logo/theme and all awards/prizes, documents, articles, and workshops/webinars regarding membership
2. Approve documents to the Membership Online Toolkit

**Designated Officer of Outreach shall:**

1. Facilitate the work of the Outreach Coordinator to maintain and update the charter binder and other documents and resources used in the chartering of new NYS PTA units and councils
2. Support the work of the Outreach Coordinator to respond to and maintain records of all outreach inquiries for new charters
3. Support the work of the outreach coordinator to provide chartering training to region directors and help them to identify and pursue opportunities for outreach, engagement, diversity and growth in their regions
4. Facilitate the collaboration of the Outreach Coordinator, Field Support Coordinators, and Region Directors to support and mentor new units and at-risk units
5. Working with the Outreach Coordinator to determine if a unit/council should be dissolved or retained
6. Collaborate with the Outreach Coordinator and State Office to working on the status of units not in good standing

**Designated Officer of Programs shall:**

1. Work with the Programs team and assigned staff members to create new programs.

2. Be aware of new or changed National PTA awards and programs and their requirements, to assist NYS PTA to plan its participation i.e. Reflections, School of Excellence.
3. Oversee the NYS PTA Celebration of the Arts with the Events/Programs Associate, and collaborate with the Programs Coordinator and Arts Specialist responsible for facilitating the planning.
  - a. Creating a budget for the event for the treasurer
  - b. Approving the ordering of the necessary items
  - c. Approving all correspondence, invitations, etc.
  - d. Giving updates to the Executive Committee of process and the event
4. Report to the Executive Committee all PARP and Reflection awards information, as required by the BOD Procedures
5. Review all information, program award applications, reflections materials and PARP Toolkit, posted to the website prior to sending it to the President

**Designated Officer of Youth Members shall:**

1. Encourage the Youth Member voice in NYS PTA

## **FEDERAL LEGISLATIVE CHAIR COORDINATOR**

**Coordinator of Federal Legislative Chair shall:**

1. Keep abreast of issues concerning federal legislation and share that information with the Executive Committee and the Board of Directors.
2. Coordinate federal and state advocacy with the President and assigned staff.
3. Write articles for the *New York Parent Teacher* and make presentations on federal topics at major PTA events.
4. Attend monthly live training webinars hosted by National PTA.
5. Arrange the appointments for Hill visits in the year that National PTA holds a legislation conference.
5. Serve as a member of the Legislative Summit Committee.

## COORDINATORS

### Each Coordinator shall:

1. Upon Appointment:
  - a. Obtain all files and material including State PTA property from the previous (chairman)/coordinator within two (2) weeks of the beginning of term
  - b. Review predecessor's reports of the specialists/committee/team activities, and recommendations, if any
  - c. Become familiar with all PTA positions pertaining to the position and become knowledgeable about all areas that fall within the position in an effort to become an informed and capable leader
  - d. Review job description, procedures & bylaws including specific areas/topics to be covered, items produced
  - e. Obtain a list of region counterparts and send a letter of introduction to region counterparts or Region Director if no counterpart has been appointed, if applicable
  - f. Arrange a zoom call with designated specialists and region counterparts.
2. For Specific Board Position:
  - a. Keep current with developments and information within assigned area
  - b. Respond to emails, text messages and telephone calls within 48 hours
  - c. Coordinate activities with other state coordinators whenever joint efforts will prove effective
  - d. Prepare a position paper or other documents if requested by the convention delegates and/or Board of Directors
  - e. Serve on assigned committee(s) as described in Board of Directors Procedures and/or assigned by President
  - f. Prepare and submit articles and/or blurbs for all publications and social media sites listed on the communications chart
  - g. Participate in National PTA Virtual Meetings, if applicable
  - h. Serve as primary liaison between NPTA and the state PTA; and between the state PTA and local units/councils/regions
  - i. Advise the designated officer of a need for a committee
  - j. Obtain approval for all travel through Designated Officer
  - k. Obtain approval for all materials from the Designated Officer
3. For Reports:
  - a. Prepare reports for Board of Director meetings and submit to Designated Officer for approval and posting on the internal data system
  - b. Keep Board of Directors informed of new developments within the field
4. Respond to communications received from units or councils after consulting with the appropriate region director and share information with the designated officer and appropriate region counterpart. Provide assistance to the region counterpart with unit and council problems as requested by the region director

5. For Events:
  - a. Attend SLC and Convention and any other event when “Call to Conference is received.
  - b. Present workshops at events as needed.
    - i. Submit RFP for workshop with approval by Designed Officer
    - ii. Prepare and have approved by Designed Officer any materials to be distributed
  - c. Perform duties as greeter or host for workshops as assigned by the Operations/Events Manager
6. Working with Specialists, if applicable:
  - a. Encourage Specialists to contribute articles for state publications and make recommendation for updating of website
  - b. Send a letter of introduction for the specialist to region counterparts or region director if no counterpart has been appointed, in the fall
  - c. Communicate regularly, report progress and introduce new plans/business of assigned specialist to the designated officer
  - d. Keep up-to-date file on assigned specialists
  - e. Review and approve any material of assigned specialists to be distributed by the state office and forward to designated officer for final approval
  - f. Review new material to be distributed by assigned specialists at workshops and forward to designated officer for final approval
  - g. Remind assigned specialists to get approval from designated officer for all travel
7. Maintain a file including:
  - a. Reports to designated officer
  - b. Information sent to and received from region counterparts
  - c. Articles written for the state publications
  - d. Materials received from National PTA and other resources including source and cost
  - e. Agenda and reports of all workshops and meetings conducted
  - f. Correspondence and other material relating to the position and pertinent to the continuity of the work of the coordinator
  - g. Approved plan of work
8. Review/Update information:
  - a. Coordinate with the State Office to update and maintain current information on the website and social media
  - b. Coordinate with the Designated Officer to upload current information on the NYS PTA data system
  - c. Review/Update the Resource Guide as needed
  - d. Review/Update Policies and Procedures as needed
  - e. Review/Update training materials and videos
9. Chair Committee Meetings:
  - a. Call at least two (2) meetings a year, if applicable
  - b. Provide to committee members reports of committee meetings and work

- c. Have committee approval of report to be presented to Board of Directors, if applicable

10. Team Meetings

- a. Call team meetings at least two (2) times a year, if applicable
- b. Work with your team to provide support and information
- c. Update the team on any changes in Board of Directors Procedures, guidelines, etc.
- d. Create a plan of action for the team aligned with the Strategic Plan

## **AWARDS COORDINATOR**

**In addition to the general Coordinator responsibilities listed above, the Awards Coordinator shall:**

1. Be the Coordinator of awards offered by NYS PTA with the exception of Reflections and PARP.
2. Assign tasks to Recognitions Specialist as support is needed to ensure consistency is maintained in relation to PTA guidelines
3. In conjunction with the Recognition Specialist create and execute a marketing plan to promote all awards and recognition opportunities
4. Be responsible for the following regarding Youth Humanitarian Award in Memory of Stanley Marcus, Leadership Award in Honor of Jane Skrzypek, Teacher Fellowship for Graduate Study in Memory of Richard Gazzola, Family Engagement Award in Honor of Jami-Beth Knapp, Susanne Smoller Commitment to Advocacy Youth Award and Innovative Teacher Grant:
  - a. Coordinate with the State Office in updating all award applications and forward them to Designated Officer for approval
  - b. Coordinate with the State Office on updating all letters and flyers as well as post on the web site
  - c. Coordinate the judging of all applications received with the designated state committee
  - d. Coordinate with the State Office the distribution of all letters for finalists, non-finalists, Presidents and Region Directors, where applicable
  - e. Coordinate with the State Office the ordering of any and all awards including plaques, clocks, award checks, etc.
  - f. See that all state winners are announced and posted on the web site
5. Be responsible for the following regarding Jenkins Memorial Scholarship:
  - a. Coordinate with the State Office in updating all award applications and forward them to Designated Officer for approval
  - b. Coordinate with the State Office on updating all letters and flyers as well as post on the web site
  - c. Forward each regional Jenkins interview site the documents needed to organize the interviews
  - d. Contact NYSUT for luncheon and invitation to Jenkins interview (only if interviews are in person)
  - e. Coordinate invitations for students to region site
  - f. Coordinate distribution of the student applications to the appropriate region site and all other necessary documentation
  - g. Coordinate the judging of all applications received with the designated state committee

- h. Coordinate with the State office the distribution of all letters for finalists and non-finalists
- i. See that all state winners are announced and posted on the web site
- j. Review transcripts and process all check request received from previous Jenkins scholarship winners

6. Seek new awards, scholarships and income opportunities
7. Work with the State Office on all awards as stated in the Awards Process Book
8. Work with the State Office in preparing the Awards presentations for convention

## BYLAWS COORDINATOR

**In addition to the general Coordinator responsibilities listed above, the Bylaws Coordinator shall:**

1. **For the State PTA Bylaws:**
  - a. Review the State PTA bylaws to ensure conformity with National Bylaws as required
  - b. Review the NYS PTA Bylaws regularly with the Bylaws Committee to recommend any necessary changes
  - c. See that the proposed bylaws amendment(s) are sent to units/councils at least thirty (30) days prior to the convention
  - d. Present the proposed bylaws amendments to the delegate body at convention for their adoption
  - e. Post-convention, edit the amended bylaws document and forward to the Designated Officer and President for approval and posting
2. For units, councils, and regions:
  - a. Provide updated instruction and training to Region Bylaws counterparts and Region Directors and unit/council members on bylaws at Summer Leadership Conference
  - b. Set up virtual meetings with Region Bylaws Chairs, as necessary
  - c. Review and update bylaws patterns as needed
  - d. See that the bylaws data on the membership data system/bylaws data system is up to date and accurate
  - e. Approve bylaws received from Region Bylaws counterparts via the bylaws data system
  - f. Post the newly approved Region Bylaws to the Region Board membership data system
  - g. After approving a unit's/council's bylaws, update the expiration date on the unit's/council's home page on the membership data system
  - h. Assist units, councils, and regions with the formulation of procedures
  - i. Submit pattern changes for approval by the Executive Committee
3. Review and update the NYS PTA Procedures with the Bylaws Committee with input from the Board of Directors

## **DIVERSITY COORDINATOR**

**In addition to the general Coordinator responsibilities listed above, the Diversity Coordinator shall:**

1. Have knowledge of the PTA Diversity policies and plans.
2. Arrange for and/or present training and workshops/webinars on diversity issues at state events and at other times as requested
3. Provide the Board of Directors with timely information and training on state and national issues relating to diversity and inclusion
4. Work with other coordinators and specialists to develop and implement plans of action for outreach and engagement which are appropriate for diverse communities
5. Follow census and other indices of demographic changes that will influence PTA membership, leadership, and family engagement
6. Act as a liaison to outside organizations with common interests when requested
7. Be knowledgeable of National PTA diversity and Inclusion policies, programs, tools and plans and attend diversity workshop/trainings offered by National PTA
8. Participate in the NYS PTA Diversity, Equality and Inclusion Committee
9. Participate in the Leadership Development Committee
10. Work through the Leadership Development Team to expand leadership capacity at state, region, and local levels by training and engaging diverse members, families, and communities

## **EDUCATION COORDINATOR**

**In addition to the general Coordinator responsibilities listed above, the Education Coordinator shall:**

1. Keep the Board of Directors informed on state and, with Federal Legislation Chair, national issues relating to education
2. Attend State Education Department meetings when possible:
  - a. Collaborate with the Executive Director on follow-up actions as necessary
  - b. Partner with the Special Education Specialist and Legislation/Resolutions Coordinator on projects as appropriate
  - c. Summarize the State Education Department report to be shared with the Governance and members through communications vehicles within a 2-week timeframe, when possible
  - d. Testify at State Education Department meetings/hearings when requested by the president, when possible
  - e. In conjunction with the Executive Director network/build partnerships among State Education Department staff and other education counterparts
  - f. With office staff, maintain current State Education Department contact information and distribute at convention and/or other events/mailings. Assure State Education Department have PTA contact information
3. When possible, serve as the NYS PTA representative to the State Education Department committees and task force opportunities such as the annual Teacher of the Year Committee, and other committees as assigned by the president
4. Serve on the Resolutions Committee:
  - a. Be informed on resolutions pertaining to education
  - b. When necessary, write resolutions on education issues
  - c. Communicate with regions/units/councils regarding education resolutions and encourage them to participate in the advocacy process
5. Serve on the Legislative Summit Committee
6. Provide NYS PTA policy stance on education issues, current and changing education strategies and collaborate with Executive Director on education topics/draft papers of importance to NYS PTA
7. Work with the Executive Director and other Governance Team members on education policy related to family engagement initiatives

## **FAMILY ENGAGEMENT COORDINATOR**

**In addition to the general Coordinator responsibilities listed above. the Family Engagement Coordinator shall:**

1. Be knowledgeable about and share information regarding policies, strategies and practices that foster family, school, and community engagement in education to support learning and improve student achievement
2. Build member awareness and collaborate on advocacy efforts that support Regents policies and Commissioner's Regulations related to parent and family engagement
3. Support and promote statewide implementation of PTA family engagement initiatives and National PTA Family-School Partnership Standards and support the adoption and implementation of the NYS Family Engagement Standards.
4. Serve on the Diversity, Equity and Inclusion Committee as prescribed in BOD Procedures
5. Serve on Resolutions Committee as prescribed in BOD Procedures
6. Be familiar with state and national organizations with a common interest
7. Attend conferences and participate as the contact person for certain partnering organizations, as requested
8. Keep family engagement and building family-school partnership materials current on the NYS PTA data system and/or website
9. Work with Governance Team members to help units seek out new ways to engage families

## FIELD SUPPORT COORDINATOR

**In addition to the general Coordinator responsibilities listed above, the Field Support Coordinator shall:**

1. Serve as the support system for the region directors in assigned area. Be available for consultation and assistance
  - a. Within state budget limitations, attend the Annual meeting and at least one (1) region board meeting in each assigned region and/or as many region meetings, programs, events, and activities as possible
  - b. Plan with each region director an annual region board orientation, when requested. Attend and/or participate in the Region Board orientation. Conduct the Region Board training when requested by the Region Director
  - c. Assist with outreach for newly chartered units, if needed
  - d. Assist Region Director with resolving conflicts occurring within units and the Region, in your assigned areas, if requested
  - e. Support the Region Directors in consultation on unit matters, when requested
2. Organize virtual meetings and calls, periodically with assigned region directors
3. Discuss with the Region Director the state of the region throughout the year and assist with any plan of action, if needed
4. Monitor the NYS PTA data system/bylaws data system/membership data system to ensure timely postings from each region in each of the following areas:
  - a. monthly Region Director reports
  - b. monthly Treasurer report
  - c. region bylaws expiration date
  - d. region budget(s)
  - e. audit/financial review report(s)
  - f. annual reports – to include annual financial report and historian report
  - g. minutes of Annual meeting
5. Look for new talent for appointment to positions on the Board of Directors, state committees and task forces
6. Fulfill and oversee the responsibilities of the Region Director, until a new region director is appointed by the Executive Committee, if requested by the President and/or Designated Officer for the Field
7. Report to the Board of Directors the meetings that you have attended, committees you are assigned to, and actions taken within your assigned regions for the required meetings
8. Collaborate with the Field team on reviewing and updating:

- a. Forms pertaining to the field – i.e. Region Director Report

## **LEADERSHIP DEVELOPMENT COORDINATOR**

**In addition to the general Coordinator responsibilities listed above, the Leadership Development Coordinator shall:**

1. Work to further the efficacy of recruitment, training, growth, and support of current and potential leaders of the NYS PTA
2. Chair the Leadership Development Committee which has a focus of activities, resources, and events geared towards developing and mentoring current and future leaders
3. Facilitate the work of the Leadership Development Committee to create a model for leadership development, focusing on attracting, retaining, and developing new leaders both within and outside the association
4. Support and assist in the development of leadership training and mentoring programs on a statewide basis
5. Participate in the NYS PTA Diversity, Equity and Inclusion Committee
6. Assist in providing regional leadership training opportunities as requested in consultation with the Field Support Coordinators, the Leadership Training Specialist, and their Designated Officers.
7. Encourage the sharing of leadership materials and techniques throughout the state via NYS PTA publications and social media
8. Share updated National PTA leadership resources and awards information, along with criteria, to assist NYS PTA to plan its participation
9. Work with the Leadership Development Committee at the direction of the Awards Specialist to judge the Leadership Award in Honor of Jane Skrzypek
10. Work through the Leadership Development Team to expand leadership capacity at state, region, and local levels by educating and engaging diverse members, families, and communities
11. Work with the Leadership Development Committee to evaluate the NYS PTA Leadership Award Program annually

## LEGISLATION COORDINATOR

**In addition to the general Coordinator responsibilities listed above, the Legislation Coordinator shall:**

1. Be knowledgeable about the field of legislation and be informed and current on state legislative issues affecting children & youth, and:
  - a. Be familiar with the legislative process and the political process
  - b. Be in contact with state legislators, state educational organizations and the NYS Education Department, as needed
  - c. Be familiar with the NYS PTA's advocacy priorities as outlined in Legislative Directives
  - d. Revised annually the Legislative Priorities in collaboration with the Advocacy Team and present for approval at the Board of Directors pre-convention meeting.
  - e. Be familiar with National PTA's positions and legislative policies and programs
  - f. Work with the board member assigned to federal legislation to coordinate state and federal advocacy efforts
2. Be a resource for and communicate legislative news and information to units, councils, regions and the, Governance Team and:
  - a. Ensure that updated advocacy documents, and brochures are disseminated and/or posted to website
  - b. Write letters, memos, or emails regarding pending legislation, as needed
  - c. Facilitate member communication with legislators
  - d. Coordinate and edit any advocacy alerts, new briefs or NYPT
3. Work to promote PTA views and positions:
  - a. Attend meetings, legislative hearings, and state and national conferences as requested
  - b. Testify at hearings with the approval of the president
4. Be responsible for planning statewide legislative workshops and activities, such as PTA Advocacy Month, and Legislative Summit and Lobby Day training, with the assistance of the Advocacy Team and Executive Director
5. Serve as chair of the Legislative Summit Committee
6. Serve on the Resolutions Committee:
  - a. Be informed on resolutions pertaining to education
  - b. When necessary, write resolutions on education issues
  - c. Communicate with regions/units/councils regarding education resolutions and encourage them to participate in the advocacy process

## MEMBERSHIP COORDINATOR

**In addition to the general Coordinator responsibilities listed above, the Membership Coordinator shall:**

1. Set membership goals for the year for each unit, region and New York State and include those goals in the Membership Team Plan of Work to be approved by the Executive Committee
2. Work with the Membership Team to communicate with region directors and region membership chairs regarding membership:
  - a. Highlight membership numbers in relation to the previous year's numbers
  - b. In conjunction with the assigned staff member and Marketing Specialist, advise regions of their membership goals for the year, and provide encouragement and advice for meeting them
  - c. Give helpful information and instruction on how to carry out their responsibilities throughout the year
  - d. Encourage region membership chairs and other region board members to contact units regarding membership registration and payment
  - e. Provide copies of reports as needed, and instruct as to where report can be found
  - f. Provide them with the tools they need to have a successful membership year.
  - g. Conduct month calls and/or check-in with all region membership chair/ region directors.
3. Throughout the year, encourage region counterparts to have region board members cooperate in contacting units with small dues payments or no payments made.
4. Coordinate with the Designated Officer and assigned staff member to establish the list of units in delinquent status, so letters may be sent to the principal/superintendent per our procedures
5. Work with the Designated Officer and assigned staff member for information to be included in the electronic and/or hard copy August mailing. In conjunction with the assigned staff member and Marketing Specialist, encourage and provide units with marketing campaign resources to their membership
6. Work with the Membership Team to come up with membership awards and incentives
7. Chair the NYS PTA Membership Committee
8. Work with the Membership Team to develop campaign and marketing materials for use by units in recruiting and retaining members.

9. In conjunction with the president, write an annual membership proclamation for the Governor to sign. Submit to the Governor's office in Albany by June 1. Request Governor's office to send original to the state office, and ensure that it is added to the website for units to use by September 1
10. Conduct member surveys as needed and disseminate information gathered to Board of Directors, and suggest improvements for approval, if applicable
11. Be familiar with the job of the assigned staff members and Marketing Specialist
12. Work with other NYS PTA Teams to develop new ideas to reach more members.
13. Participate in the NYS PTA Diversity, Equity and Inclusion Committee

## **OUTREACH COORDINATOR**

**In addition to the general Coordinator responsibilities listed above, the Outreach Coordinator shall:**

1. Work directly with the field team on all necessary outreach
2. Maintain the Charter Binder
  - a. updating as necessary
  - b. provide training for Region Directors
  - c. develop new outreach and marketing materials, as needed
3. The State Office will forward all calls and correspondence to the Outreach Coordinator. Outreach Coordinator will contact the person to get information on why they want to be a potential PTA/PTSA, and shall provide information regarding the benefits of PTA/PTSA. Maintain records of outreach inquiries received.
4. Respond to all inquiries within 48 hours
  - a. Initial contact will be made by the coordinator who will then follow up with the appropriate Region Director and field support coordinator
  - b. Follow up with the designated Region Directors periodically, updating files accordingly
  - c. Keep a supply of outreach materials and send as appropriate
5. Work with Region Directors to identify key areas for potential PTA growth
  - a. Obtain and maintain a list of all PTA/PTSA's and all non PTA/PTSA's
  - b. Send a letter to Superintendents to inquire about any interest
  - c. Be advised by all Region Directors of requests for chartering and/or interest in PTA within their regions
  - d. Assist Region Directors in meeting with school administrators, community leaders, and parent groups to determine interest in establishing new units and presenting the advantages and benefits of PTA to schools, communities and/or parent groups
  - e. Report to the designated officer the resolution of all contacts
6. Informational meeting with potential PTA/PTSA shall be conducted by the Region Director and/or Outreach Coordinator upon request.
7. A pre-charter and/or charter meeting shall be conducted by the Region Director or Outreach Coordinator upon request.
8. Maintain a spreadsheet with the State Office of the status of new charters, pending charters and inquiries. Report the status to the Board of Directors and in any necessary publications assuming new charters are acknowledged.
9. Working with the Designated Office, maintain the Dissolution Process with

the necessary materials.

- a. Dissolutions process and form will be in the Charter Binder
- b. Sample letter for a dissolution unit in jeopardy
- c. Sample letter for units requesting a dissolution
- d. Sample Principal letter to assist in getting the unit back in good standing

10. Work with Region Directors and Field Support Coordinators to mentor new units and at-risk units.
  - a. Check in on new units at least quarterly. Work with the Region Directors' to help units get themselves in good standing.
11. Develop and implement outreach and engagement efforts within NYS urban, rural, suburban, and diverse communities.
12. Work with any GT members as needed to assist at-risk units.
13. Participate in the NYS PTA Diversity, Equity and Inclusion Committee
14. Participate in the NYS PTA Membership Committee

## PROGRAMS COORDINATOR

**In addition to the general Coordinator responsibilities listed above, the Programs Coordinator shall:**

1. Be the Coordinator of programs offered by NYS PTA
2. Provide oversight and support for assigned specialists to ensure consistency with related PTA guidelines
3. Be aware of new or changed National PTA criteria related to programs (i.e. Reflections)
4. In conjunction with the Literacy Specialist, facilitate the PARP award process
5. In conjunction with the Arts Specialist, facilitate the Reflections program and awards, Reflections Theme Search contest and arts celebration(s).
6. Seek new programs including those in collaboration with any Governance Team member(s)
7. Conduct virtual meetings with Specialists and Region partners

## RESOLUTIONS COORDINATOR

**In addition to the general Coordinator responsibilities listed above, the Resolutions Coordinator shall:**

1. Be knowledgeable about the field of advocacy and be informed on issues affecting children & youth, and:
  - a. Be familiar with NYS PTA's positions as defined in Basic Policy and Where We Stand
    - i. After review by Resolutions Committee, prepare revised Basic Policy for approval by Executive Committee at the June meeting
    - ii. In collaboration with the state office, revise Where We Stand to reflect delegate action taken at the annual convention
  - b. Be familiar with National PTA's positions and public policy
2. Be a resource for and communicate NYS PTA policy and resolutions information to units, councils, regions and the, Governance Team and:
  - a. Ensure that updated advocacy documents and brochures are disseminated and/or posted to website
  - b. Write letters, memos or emails regarding PTA resolutions and policy, as needed
3. Work to promote PTA views and positions:
  - a. Attend meetings and state and national conferences as requested
  - b. Do presentations and training for NYS PTA members
4. Serve as chair of the Resolutions Committee and member of the Convention Committee
  - a. Prepare resolutions binder and materials for the Resolutions Committee
  - b. Coordinate and guide the work of the Resolutions Committee throughout the year
  - c. Present the proposed Resolutions and Basic Policy to the Executive Committee for their approval
  - d. Prepare the proposed Resolutions packet
  - e. Ensure that after convention the adopted resolutions shall be posted on the website and sent
    - i. To units, councils, and regions in a state publication and/or by direct mail
    - ii. To appropriate agencies

## **WELLNESS COORDINATOR**

**In addition to the general Coordinator responsibilities listed above, the Wellness Coordinator shall:**

1. Maintain regular communication with local, state, and federal agencies concerned with wellness issues
2. Remain educated, informed and up to date on wellness-related issues affecting children and youth.
3. Send wellness information to unit/council and region counterparts when appropriate
4. Contact legislators:
  - a. Ask to be placed on mailing lists of legislators assigned to committees addressing wellness issues including following legislators on social media outlets
  - b. Support pending legislation through phone calls, emails, letters, and visits
  - c. Keep copies of all correspondence
5. For all wellness issues:
  - a. Provide leadership in developing, organizing, implementing, and evaluating the state's wellness efforts
  - b. Coordinate efforts of wellness-related specialists
  - c. Provide assistance, education, leadership training and encouragement to unit/council/region and state PTA leaders on matters related to wellness curricula, policies, resources, services, and education programs
  - d. Serve as a resource and lead person for researching, developing, and implementing state PTA wellness-related resolutions and position statements
  - e. In collaboration with specialists, identify, recommend, and disseminate appropriate wellness-related written and audio-visual information and educational materials to PTA leaders and members
  - f. Serve as the state PTA liaison to state agencies and community-based organizations for wellness issues that are not covered by a specialist
  - g. In collaboration with specialists, maintain regular contact with region counterparts regarding wellness-related issues
6. Serve on the Resolutions Committee
7. Serve on the Legislative Summit Committee

## **YOUTH MEMBER(S)**

**In addition to the general Coordinator responsibilities listed above, the Youth Member(s) shall:**

1. Provide student perspective on the Board of Directors
2. Keep the Board of Directors informed about issues related to youth
3. Plan and promote student events at will, or as requested
4. Promote increased student participation in all PTA levels
5. Encourage youth members to participate on region boards
6. Collaborate with youth organizations to promote student focused programming
7. Participate in activities provided by the National PTA as approved
8. Share information with region counterparts
9. Assist in the coordination of the yearly SLC Donation Drive
10. Be a part of the Membership Committee
11. Chair the NYS PTA Youth Member Committee. This committee shall include the Designated Officer, and one youth member from each region

## REGION DIRECTORS

**The Region Director shall:**

1. Arrange a date for holding a region board orientation with the Field Support Coordinator and continually encourage and develop leadership on the region board. Attend and assist with any meetings which may be conducted by the Field Support Coordinator when necessary or desired
2. Plan, with the region board, the use of state allocation funds in the region.
3. Review the contact information for the unit/council officers on the NYS PTA data system for the current year. All units/councils can have no less than a President, Secretary, and Treasurer, but no more than is listed in the unit bylaws.
4. Submit your Officer contact information to the designed State Office team member as soon as possible after the region's annual meeting (Spring Conference)
5. Submit the region board contact information to the designated State Office team members and FSCs no later than July 15
6. Assist in advancing the work of the units and councils within the region:
  - a. Urge all units to submit the state and national portion of the dues to the state office as directed by the state bylaws
  - b. Supervise the organization of new units and councils within the region
  - c. Have an outreach plan for non-PTA schools for the purpose of PTA affiliation
  - d. Arrange and plan Schools of Instruction for units/councils when requested
  - e. Communicate with units and councils on a regular basis to keep them informed of region and state information and events
  - f. Assist newly chartered units by providing an outreach within the unit or attendance at a comparable region workshop (i.e. -new officers' training) at minimal cost to the unit as soon as possible after the initial charter
7. Supervise the manner in which delinquent units are handled by following the "Dissolution Process" and submit "Request for Dropping Unit/Council" form to Designated Officer for approval along with a copy to the Field Support Coordinator. Refer to the Board of Directors procedures for further clarification.
8. Coordinate responsibilities for state convention:
  - a. Carry out duties as a host region if assigned
  - b. Organize a region resolutions forum for units/councils
9. Any member of the Governance Team acting on behalf of NYS PTA must inform the Region Director in that area when conducting trainings or workshops, especially those who reside in that region.

10. Submit a Request for Field Service for any State Governance Team members who are acting on behalf of NYS PTA, including members who reside in your region, to attend or participate in, special region workshops, etc. at least 30 days prior to function (on Field Service Request Form)
11. Be responsible for training all region board members to become a future region director. Submit recommendation for qualified candidates for the position of region director, as requested.
12. Grow leadership. Delegate responsibilities to region board members within the region procedures and guidelines.
13. Announce to the units, councils, and community the name of the new region director and arrange for a timely transfer of files and supplies to the new region director
14. Attend training opportunities specifically designed for region directors as requested
15. Encourage region officers/region board members, and local PTA leaders to attend NYS PTA conferences and events and allocate funding when available
16. May serve on state committees if interested
17. Consult with assigned Field Support Coordinator as often as needed.

**Submit the following:**

Time	Report/Form	To
10 <sup>th</sup> of the month	Monthly RD Report	Posted to the NYS PTA data system
	Monthly Treasurer's Report	Posted to the NYS PTA data system
March 1	Spring Conference: Date, Location, Theme Field Service Request Form	Designated Officer along the Field Support Coordinator and State Office
No later than 30 days after Spring Conference	Annual Report (state of region report given at Spring Conference)	Posted to the NYS PTA data system
July 15 and as reviewed thereafter	Region Board contacts	Assigned staff member/FSC
October 1	Region Budget Region Audit Report	Posted to the NYS PTA data system
December 1 (due to IRS by 11/15)	Region Form 990	Posted to the NYS PTA data system
One month prior to a region function other than	Field Service Request	Designated Officer with a copy to the Field Support Coordinator

Spring Conference		
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## **SPECIALISTS**

We will be appointing the following specialists: Arts, Environment, Health, Juvenile Protection, Leadership Training, Literacy, Marketing, Male Engagement, Membership Engagement, Recognitions, Rural, Special Education, Technology Training Specialist, and Urban.

### **A Specialist shall:**

1. Upon Appointment:
  - a. Obtain all files and materials including State PTA property from the previous specialist within two (2) weeks of the beginning of term.
  - b. Review predecessor's reports of the team activities, and recommendations, if any
  - c. Become familiar with all PTA positions pertaining to the position and become knowledge about all areas that fall within the position in an effort to become an informed and capable leader.
  - d. Review job description, procedures & bylaws including specific areas/topics to be covered, items produced
2. For Specific Board Position:
  - a. Work with coordinators assigned in the NYS PTA Organization Chart.
  - b. Keep current with developments and information within the assigned area.
  - c. Respond to emails, text messages and telephone calls within 48 hours
  - d. Along with Coordinator, develop a suggested task list based on the NYS PTA Events Calendar
  - e. Participate in team meetings and calls with Coordinator and other Specialists
  - f. Serve on assigned committee(s) as described in Board of Directors Procedures and/or assigned by President
  - g. Participate when necessary on calls and webinars to provide a perspective on assigned area
  - h. Assist in preparing NYS PTA materials, as needed
  - i. Collaborate with and provide support and information to the Governance Team member(s) with whom they are assigned or requested to work
  - j. Work with State Office personnel in assigned area
  - k. Seek approval for correspondence from assigned Coordinator (Carbon copy Coordinator on all correspondence)
  - l. Communicate with unit/council/region counterparts
  - m. Provide information for the membership as related to assigned area.

- n. Prepare and submit articles and/or blurbs for all publications, NYS PTA website and social media sites listed on the communications chart
- o. Provide connections with outside organizations in assigned areas.
- p. Serve on committees of outside organizations representing PTA's interest in their topic area, as assigned and report to Coordinator
- q. Obtain approval for all travel through Designated Officer

3. For Reports:

- a. Prepare reports for Coordinator/Designated Officer periodically and when requested
- b. Keep Coordinator and Designated Officer informed of new developments within the assigned area

4. For Events:

- a. Attend SLC and Convention and any other events when "Call to Conference" is received
- b. Present workshops at events as needed
  - i. Submit RFP for workshop with approval by Coordinator and Designated Officer
  - ii. Prepare and have approved by Designated Officer any materials to be distributed
- c. Perform duties as greeter or host for workshops as assigned by the Operations/Events Manager

5. Maintain a file including:

- a. Reports to Coordinator and Designated Officer
- b. Information sent to and received from unit/council/region counterparts
- c. Articles written for state publications
- d. Materials received from National PTA and other resources including source and cost
- e. Correspondence and other material relating to the position and pertinent to the continuity of the work of the Coordinator
- f. Approved plan of work

6. Review/Update information:

- a. Coordinate with the State Office to update and maintain current information on the website and social media
- b. Coordinate with the Designated Officer to upload current information on the NYS PTA data system
- c. Review/Update the Resource Guide as needed
- d. Review/Update Policies and Procedures as needed
- e. Review/Update training materials and videos

7. Chair Committee Meetings:

- a. Call at least two (2) meetings a year, if applicable

- b. Provide to committee members reports of committee meetings and work
- c. Have committee approval of report to be presented to Board of Directors, if applicable

## **ARTS SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Arts Specialist shall:**

1. Expand the arts and art awareness within the State
2. Participate in National PTA calls
3. Advocate for the arts in school and foster school-community collaboration.
4. Be responsible for overseeing the Reflections Program for NYS PTA by:
  - a. Updating all the Reflections applications and documents
  - b. Updating the website with pertinent information
  - c. Coordinate and work with the Region Reflections Chairs (RRC)
  - d. Oversee the NYS PTA Celebration of the Arts
  - e. Oversee the digital Reflections Gallery at Convention
  - f. Oversee the Reflections Theme Search contest
  - g. Collect all Region artwork, organize items into a format prescribed by National PTA (i.e. a shareable Google spreadsheet that includes all Student Entry Form information and links to artwork.)
  - h. Oversee the Reflections judging process by working with/assist the State Office on securing the judges, judging score sheets and any other judging materials and files, and receiving back the judges' score sheets to determine the NYS PTA Reflections winners.
  - i. Work with the State Office to advance all state Reflections entries to the National PTA level
  - j. Work with the State office on the Reflections letters and certificates
  - k. Work with the State office on the returning of all Region artwork
  - l. See that the State and National PTA Reflections winners are posted on the web site

## **ENVIRONMENT SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Environment Specialist shall:**

1. Serve on the Resolutions Committee.
2. Participate in National PTA calls
3. Keep current and up to date on proposed legislation and regulation concerning environment-related issues affecting children and youth.
4. Review NYS PTA position paper in the area of the environment and inform the Resolutions Coordinator of any updated regulations or laws that need to be addressed.
5. Advocate for the environmental concerns, health and safety issues, and foster school-community collaboration
6. Assist regions with environmental health and safety concerns.

## **HEALTH SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Health Specialist shall:**

1. Participate, when necessary, on calls and webinars to provide a health perspective.
2. Serve on the Resolutions Committee.
3. Review NYS PTA position papers in the area of specialty and inform the Resolutions Coordinator of any updated regulations or laws that need to be addressed.
4. Assist regions with health-related efforts for their areas
5. Advocate for health, safety and wellness concerns and foster school-community collaboration

## **JUVENILE PROTECTION SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Juvenile Protection Specialist shall:**

1. Participate, when necessary, on calls and webinars to provide a juvenile protection perspective.
2. Serve on the Resolutions Committee.
3. Review NYS PTA position papers in the area of specialty and inform Coordinator of any updated regulations or laws that need to be addressed.
4. Assist regions with youth safety issues and protective services.
5. Advocate for the safety and well-being of all youth.
6. Keep current on proposed legislation and regulation concerning the safety and well-being of youth

## **LEADERSHIP TRAINING SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Leadership Training Specialist shall:**

1. Assist Coordinator in the development of leadership capacity in regions, units, and councils
2. Work with Coordinator and the Leadership Development Committee in the evaluation of the NYS PTA Leadership Award Program annually
3. Act as a liaison for leadership issues between NYS and region or local PTAs, as needed
4. Participate in Diversity, Equity and Inclusion Committee to assist in enhancing leadership capacity and family engagement in diverse, rural, and urban schools and communities
5. Participate in Leadership Development Committee
6. Assist in development of leadership development materials, webinars and other resources for state, region, and unit or council use, as appropriate
7. Be responsible for the Leadership Development Monthly Webinar Series
  - a. Set up the dates for the webinars for the year in conjunction with Coordinator and Designated Officer
    - \*webinars are usually scheduled for the first week of the month
    - \*check calendars for any conflicts with NYS events, school and/or religious holidays
  - b. Once the dates are set, sent this list to the office for confirmation of any other conflicts
  - c. In the summer, with the assistance of your Designated Officers, request from the Designated Officers possible topics on which their team could present a webinar
  - d. No later than two weeks before each webinar, confirm with the Designated Officers and the presenters, title and description for publication. Webinars may be done live or be pre-recorded
  - e. Confirm with the office the publication of the webinar information through social media, NYS PTA Connections and the GT news
  - f. Prior to the webinar, confirm with presenters and ask for some personal information regarding their PTA experience
  - g. Obtain a copy of the powerpoint presentation prior to the webinar
  - h. On the evening of the webinar, the Coordinator will open the meeting with the introduction of the webinar and the Leadership Training Specialist will begin the webinar with the introductions of

the presenter(s). With the assistance of the Coordinator, monitor the chat box and pose the questions to the presenter(s) for the Q and A period

- i. At the end of the webinar, announce any upcoming events as well as the date and topic for the next webinar

8. Collaborate in the activities of the Leadership Development Team

## **LITERACY SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Literacy Specialist shall:**

1. Chair the Literacy Committee
2. Expand literacy awareness within the state through newsletter articles and social media sites
3. Collaborate in planning any Literacy events or celebrations
4. Review, update and revise the PARP Toolkit, as needed
5. Be responsible for overseeing the PARP Award by:
  - a. Updating the application and forward it to the Coordinator and/or Designated Officer for posting on the website after approval by NYS PTA President
  - b. Coordinate the judging of the winning Region PARP applications received with the designated state committee
  - c. Coordinate with the State Office the distribution of all letters for finalist, non-finalist, Presidents and Region Directors, where applicable
  - d. Coordinate with the State Office the ordering of any and all PARP awards including plaques and certificates
  - e. Submit a check request form to Designated Officer of Programs and State Treasurer for PARP monetary awards to be included with plaques and certificates
  - f. See that all state winners are announced and posted on the web site

## **MALE ENGAGEMENT SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Male Engagement Specialist shall:**

1. Be a part of the Membership Committee or other committees as assigned by the President
2. Create male engagement initiatives for NYS PTA
3. Assist regions with male engagement efforts in their areas

## **MARKETING SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Marketing Specialist shall:**

1. Be a part of the Membership team.
2. Design membership logo/theme/contests in collaboration with the other members of the team and office staff.
3. Produce marketing materials for NYS PTA
4. Assist regions with marketing efforts for their areas

## **MEMBERSHIP ENGAGEMENT SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Membership Engagement Specialist shall:**

1. Be a part of the Membership Team
2. Create membership engagement initiatives for NYS PTA
3. Assist regions with membership engagement efforts in their areas
4. Serve as a resource for new and creative approaches for membership growth

## **RECOGNITION SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Recognition Specialist shall:**

1. In conjunction with the Coordinator, contribute newsletter articles announcing award applications, reminders about deadlines for awards and award winners
2. In conjunction with the Coordinator, facilitate the applications and awards process for Twin Projects Awards (Jenkins and Gazzola), Leadership Development Award in Honor of Jane Skrzypek, Youth Humanitarian Award in Memory of Stanley Marcus, Family Engagement Award in Honor of Jami-Beth Knapp, Susanne Smoller Commitment to Advocacy Youth Award, Innovative Teacher Grant Award and any additional awards approved by the Board of Directors
3. Be responsible for updating all other awards applications and their web pages, other than the ones already designated to a Specialist

## RURAL SPECIALIST

**In addition to the general Specialist responsibilities listed above, the Rural Specialist shall:**

1. Participate in Diversity, Equity and Inclusion Committee to identify and support rural communities interested in enhancing capacity and resources for family engagement in their schools and assist with models of implementation
2. Assist in outreach efforts to rural school leadership, staff, parents, and community to assess interest and potential for successfully establishing a rural PTA unit and to support the chartering process
3. Obtain a list of Rural School Districts/PTAs.
4. Assist in identifying, engaging, and seeking support of the following from rural school district/s, as appropriate:
  - a. District/school administrator/leader(s)
  - b. District/school family engagement and support positions
  - c. District/school parent leaders/council
  - d. Community-based organizations
5. Collaborate with Region Directors to enhance engagement, develop leadership and encourage inclusion of rural unit leaders in region communications and events
6. Represent NYS PTA in the Rural Schools Association
7. Assist in development of materials and resources relevant to rural schools and communities for state, region, and/or unit/council use, as appropriate
8. Collaborate in the activities of the Leadership Development Team
9. Participate in the NYS PTA Membership Committee

## **SPECIAL EDUCATION SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Special Education Specialist shall:**

1. Participate, when necessary, on calls and webinars to provide a Special Education perspective.
2. Assist the Coordinator with any and/or all necessary activities
3. Serve on the Resolutions Committee.
4. Review NYS PTA position papers in the area of specialty and inform the Resolutions Coordinator of any updated regulations or laws that need to be addressed
5. Assist regions and units with
  - a. Information on “What a SEPTA is?”
  - b. Present Special Education workshops at region events
  - c. Assisting them in providing the resources for special needs support, such as hearing impaired, etc.
6. Advocate for the needs of Special Education children, youth, and families.
7. Keep current on proposed legislation and regulation concerning special education

## **TECHNOLOGY TRAINING SPECIALIST**

**In addition to the general Specialist responsibilities listed above, the Technology Specialist shall:**

1. Assist in development of technology training programs, materials, webinars and other resources for state, region, and/or unit council use, as appropriate
2. Assist the NYS PTA Leadership Development Coordinator in the development of Technology Training in state, regions, units, and councils
3. Act as a liaison for technology training opportunities between NYS and region or local PTAs, as needed
4. Collaborate in the activities of the Leadership Development Team
5. Participate in Leadership Development Committee
6. Work with NYS PTA Leadership Development Coordinator and the Leadership Development Committee in the evaluation of the NYS PTA Leadership Award Program annually
7. Manage event app platform for state events such as SLC and Convention

## URBAN SPECIALIST

**In addition to the general Specialist responsibilities listed above, the Urban Specialist shall:**

1. Collaborate with Region Directors and the Office Team in identifying PTA Units in Urban areas that need additional support or are not in good standing.
2. Participate in Diversity, Equity and Inclusion Committee to identify and support urban, small city and diverse areas interested in enhancing capacity and resources for family engagement in their schools and assist with models of implementation
3. Assist in outreach efforts to urban school leadership, staff, parents, and community to assess interest and potential for successfully establishing an urban PTA unit and to support the chartering process
4. Assist in identifying, engaging, and seeking support of the following from urban school district/s, as appropriate:
  - a. District/school administrator/leaders(s)
  - b. District/school family engagement and support positions
  - c. District/school parent leaders/council
  - d. Community-based organizations
5. Collaborate with Region Directors to enhance engagement, develop leadership and encourage inclusion of diverse urban unit leaders in region communications and events
6. Assist in development of materials and resources relevant to urban schools and communities for state, region, and/or unit council use, as appropriate
7. Collaborate in the activities of the Leadership Development Team
8. Participate with the Advocacy Team, based on the work and feedback from Urban PTA units, to share that narrative in legislative planning, advocacy and talking points on what is impacting Urban schools and students.
9. Participate in the NYS PTA Membership Committee