

## **Position: Treasurer**

**Name:** Lisa Watanabe

**Number of children enrolled at Ben Franklin Academy:** Currently, one child; our older child graduated from BFA in 2015

**Grade of each child:** 5th grade; our older child is currently a sophomore in the IB program at Thunder Ridge

**How long your family has been at BFA:** This is our 5th year at BFA

**How many PTO Meetings you have attended in 2017-18:** Over 20 meetings so far this year, including 7 general PTO meetings, 4 executive sessions & more than 10 ad hoc sessions. (In addition, I attended every meeting I was asked to participate in since joining the PTO in 2015 through June 2016.)

**Why are you interested serving on the BFA PTO?** Parental involvement is crucial to the success of our school and our children's' educations - I believe my skills are most compatible with the goals of the PTO.

**Why do you think you would be a good fit for this position?** In addition to over 20 years of professional experience in finance/accounting, I've held the position of Treasurer for almost two years. During this time, I've spent over 1,000 volunteer hours organizing the chart of accounts and getting the PTO reinstated as a 501(c)3 organization. I have created and streamlined processes / procedures so that we have a comprehensive system in place. I have made it a goal for parents to receive monies in an efficient manner. Additionally, I've guided the PTO to ensure we have practical long-term financial goals.

**Is there any other information you would like to share?** Yes, my tenure (so far) primarily includes getting up to speed on treasurer responsibilities and addressing the special projects identified above. Given the learning curve for this position, even for someone with a strong background in finance/accounting, I believe it's in the best interest of the PTO and the school for me to stay in this role for another two years. This additional time would give me the opportunity to test and formalize the newly established procedures, perform a cum-to-date reconciliation of select accounts, build a working relationship with our newly appointed accountant, and ensure that we have filed three consecutive years of taxes in a timely manner. I have enjoyed the challenge of being Treasurer and want the opportunity to verify that the updates that have been made are the best possible options for BFA.