

The “big transition”. That’s when PTAs change leadership at the end of their terms in office. The following ideas from Valerie Washington of Think 6 Results can guide you as your local unit transitions from one administration to the next. Outgoing and incoming leaders should work as a team. Focus on the ongoing plan, driven by making a difference for all children, to increase parent involvement and student achievement.

## **WHY TRANSITIONING IS IMPORTANT**

The transition of leadership for any organization is vitally important and may determine the effectiveness of the group for years to come. So.....

- How do you leave your position gracefully?
- How do you ensure the new officers are as ready as they can be to provide your unit with strong leadership?

## **A SMOOTH TRANSITION IS...**

- The responsibility of both the outgoing and incoming officers
- A way to help the unit avoid starting over or starting from scratch every year
- A transfer of significant organizational knowledge, minimizing loss of momentum of the unit
- An opportunity for closure for outgoing members
- A great opportunity for outgoing leaders to evaluate the year
- An orientation process for new leaders
- The leadership changeover period
- A time for incoming officers to ask questions and the outgoing leaders to give advice
- An outgoing leader’s last chance to say, “I wish I’d done this....”

## **SHARE THE WEALTH**

Pass on what you know and the files, records, and resources you have in your possession.

- Bylaws
- Job descriptions
- Organization goals
- Status reports and evaluations of previous programs or projects
- Previous minutes and support documentation
- Resources and contact lists
- Financial books, records and budgets
- Mailing and membership lists
- Historical records, scrapbooks and equipment

## **CHANGING OF THE GUARD**

Transition is not one activity. It is a process. Sharing knowledge, experience, and goals are key to the process. It is critical that you provide the incoming officers with all they need to continue the success of the organization.

- Fill in the gaps for new officers by asking yourself what you wished someone told you a year ago
- Talk about traditions, ideas, projects, as well as concerns or ideas that were never implemented
- Review and make current if necessary your bylaws, handbooks, and the like to reflect changes made during your administration
- Review job descriptions for the officers and board to be sure they accurately describe what your needs and uses
- Encourage informal meetings between incoming and outgoing officers
- Review your mailing list or membership records to make them current
- Leave behind files that might be helpful to the new person
- Orient incoming officers about resources used

## **GETTING STARTED**

### **Outgoing Officers:**

Describe the duties of office  
What was your biggest frustration with your office?  
How could it be avoided in the future?  
What was the biggest success in this office?  
What were your goals?  
Did you meet them? Why or Why not?  
How did the general members perceive this office?  
What was the Board's biggest success this year?  
Why were you able to achieve this success?

### **Incoming Officers:**

Describe the duties of office  
What questions do you have for the outgoing officer?  
What are your goals for this office?  
How do general members perceive this office?  
How do you plan to work effectively with your board?  
How do you plan to work the administration of the school?

## **YEAR IN REVIEW**

Go to [www.georgiapta.org](http://www.georgiapta.org) (Members Only Section, Leadership) to download a list of simple questions to ask yourselves as you review your unit's goals or objectives for the previous year, programs and activities, membership efforts, officer and board structure, and organizational operations.