

Quick Tips for Successful Transition from Outgoing to Incoming Officers A President's Checklist

Communication between outgoing and incoming PTA leadership teams is vital for continuity between school years and in order to maintain PTA programs, training, and business during the summer months. By successfully transitioning between administrations, incoming officers better understand their responsibilities, gain confidence and are better prepared to develop viable PTA goals for the next school year.

Resources: Local Unit Bylaws, Leadership Resource and Treasurer Guide, District and Council Leaders, Georgia PTA, and www.georgiapta.org.

Election of new officers

- Nominating Committee elected at general PTA meeting at least one month prior to officer election meeting.
- Nominating Committee submits to the PTA board, a slate of best qualified candidate for each officer position. The PTA board posts the proposed slate of officers 10 days prior to officer election meeting.
- Officers elected at general PTA meeting.
 - Nominating committee presents slate
 - President conducts election including opening nominations for officer positions to the floor
 - Election concluded by vote of PTA members only

Money Matters/Finance

- Review member approved budget to determine if changes are needed. Your goal is to have a balanced budget ready to turn over to the incoming officers the last day of your term, which is the last day of the school year. Please note that all money expenditures must be part of a member approved budget. Therefore, if you find you have excess funds or a lack of proposed funds amend the budget to reflect actual intake and output of PTA money.
- Request Treasurer prepare/submit recommendation for auditor or audit committee members
- Board of Directors vote on auditor or auditor committee
- Review all paperwork necessary for completing an annual audit
- Request treasurer prepare books for audit. The complete list of paperwork needed to complete the audit maybe found in the Leadership Resource and Treasurer's Guide under Audit.
- Request secretary make copies of all Executive Committee, Board of Directors, and General meeting minutes required for audit purposes and give them to the treasurer
- Write Georgia PTA Convention and Georgia PTA donation checks for Centennial Celebration Convention and Reflections donations, etc. These fees should be delineated as part of your member approved budget and are legitimate uses for PTA funds collected throughout the year.

Transition/Information Sharing Meetings between outgoing and incoming officers

- Request your secretary send all new officer information to Georgia PTA by May 15. This is done via the Georgia PTA website.
- Plan meeting dates with incoming officers to share information regarding the current school year's PTA business and status
- Meet with incoming officers to go over the goals and budget you set for the current school year
- Share your successes and areas of improvement
- Explain through use of bylaws the responsibilities of each officer
- Prepare procedure books to turn over to each officer by the last day of your administration--which is the LAST DAY OF SCHOOL
- Secure a date to change the signatures on file at the PTA bank. This must be done prior to the end of the school year as your administration will no longer be able to sign checks after the end of your term (last day of current school year). You will need to take a copy of your election meeting minutes and all new officers with check signing capabilities (President, Treasurer, and Secretary). The minutes are needed to prove election of the new officers and their right to access to the PTA account(s).
- Plan meeting dates for current Board of Directors (all officers and PTA committee chairs) and the incoming administration
- Request that your committee chairs turn over their procedure books and all paperwork associated with their committee to the incoming chair or officers
- Have committee chairs share with their incoming counterparts how to do their jobs--both successes and needed areas of improvement. Only through honest dialogue can PTA improve and this is an important sharing assignment.
- Challenge your board to share the things they wish they had known before beginning their job!

Membership Review

- Review your membership drive for the year with your Board of Directors
- Solicit honest input about your membership numbers
- Discuss if your member are excited/enthusiastic about PTA activity and programs
- Conduct a needs assessment to determine what your membership would like to see PTA involved in next year
- Assess your volunteer base and determine ways to grow this to include your school community/family