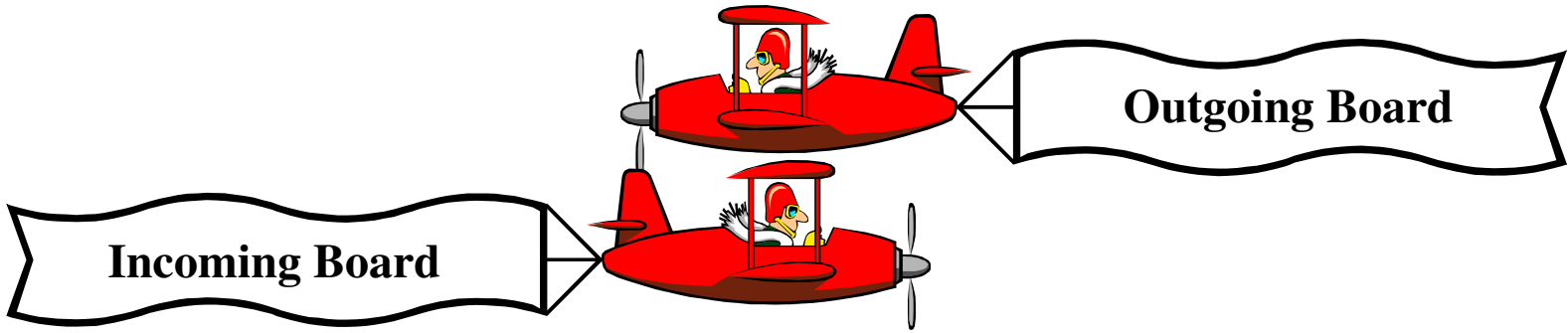


# Year End Board Transitions



**The PTA year ends on June 30th and the new one begins on July 1st!**

One of the most stressful and difficult times of the year can occur during the transition of one PTA board to another as they change leadership. Change is difficult but a necessity of life. The sharing of leadership information should begin as soon as the new officers are elected.

## 2007—2008 OFFICERS RESPONSIBILITIES

*Be available when asked, but allow the new officers to bring new ideas, enthusiasm and change that is essential to the success of your PTA. Offer support, suggestions but not criticism.*

- Thank your volunteers by newsletter, note, etc. or plan a special appreciation activity. Inform members of PTA's accomplishments this year.
- Survey membership to find out what they liked/disliked and what projects they would like PTA to work on next year. Share this information with the 2007-2008 officers.
- Send a roster of incoming officers to council president and download the template from the SCC PTA website and return to SCC PTA Publicity & President. Send roster to TN PTA office. You need to do this even if you are continuing from the previous year.
- Finish conducting business and pay all reimbursement vouchers and invoices prior to June 30th.
- Pass procedure books to incoming counterpart and meet with them to explain position and responsibilities.
- Update legal documents books and go to bank with new check signers to change bank accounts as close to July 1st as possible.
- Take a break and reflect on a job well-done! The continued success of a PTA is a compliment on a previous leader!

## 2008—2009 OFFICERS RESPONSIBILITIES

*Be sensitive to those who have gone before you. They have given their time and energies. Give them credit for their accomplishments and build on what they have begun.*

- Talk with the outgoing officer about his/her recommendations.
- Set a date to meet with the incoming executive committee and board for orientation and planning.
- Attend leadership workshops and training, including National PTA Convention in June and Summer Leadership in July.
- Encourage participation in PTA training opportunities because it's easier to do a job when you know what you're doing!
- Set up a planning meeting with the principal.
- Accept and review financial records, minutes and legal document notebooks after the audit is complete or on July 1.
- Change the signature cards at the bank on July 1st and review the budget thoroughly.
- Be familiar with the proper format for the minutes and maintaining permanent records.
- Review your PTA's standing rules & Bylaws.
- Review committee procedure books and job descriptions and appoint Parliamentarian and committee chairs (appointments are made by the President with the approval of the other elected officers).
- Remember the team concept and give each new officer and chair a share of your enthusiasm and positive attitude about PTA leadership while giving them meaningful tasks to perform.
- Make sure all of your officers and committee chairs are on the current roster sent to SCC PTA and TN PTA. You need to do this even if you are continuing from the previous year.
- Make sure procedure notebooks and legal document notebooks are updated.
- Appoint a Bylaw Committee, Audit Committee and a Standing Rules Committee.
- **Ask questions!**

**Shelby County Council**

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