



Tips for Your PTA Leadership Transition

As the school year draws to an end, PTA leaders are busy with many activities and events. Take time to look at the wonderful things your PTA has accomplished this year and express appreciation to those people who have worked for the PTA and children.

This list of important transition tasks will help assure smooth progress to get the PTA ready for next year.

- Current officers and committee chairs should complete their year-end reports, collect their materials and procedure books, and pass them on to their successors. (Please remember that PTA materials belong to the PTA, not the person.)
- The treasurer should pay all bills, settle all accounts, and be sure records are ready for the audit.
- An audit committee should be appointed and prepare to audit the treasurer's books in a timely fashion.
- If the PTA bylaws were reviewed or amended by the membership, be sure two copies are sent to the Tennessee PTA State Office, 1905 Acklen Avenue, Nashville, TN. 37212.
- Attending the Presidents Roundtable, hosted by Dr. Webb, dinner is a good way to celebrate the end of the year and look forward to the new term. .
- After the elections, names, addresses, etc., of officers should be sent to the Tennessee PTA State Office.
- Signatures on the PTA bank account(s) should be changed to the new treasurer, secretary, and president if needed. **(Remember that all checks should be signed by two people.)**
- The new officers should be installed and outgoing or retiring leaders should be thanked for their service.
- New committee chairs should meet with their predecessors, and review materials that have been passed on in their procedure books.
- New leaders should attend the SCC PTA Leadership Training in May and the Tennessee PTA Summer Leadership Training in July.
- The new Board of Managers should meet and set goals for the PTA for the coming year.
- Plan the calendar for the coming year for membership meetings, board meetings, special events and file room requests with the Principal.
- The treasurer, other officers, and appropriate committee chairs should prepare the proposed budget for the coming year. The PTA budget should reflect those goals.
- Committee chairs should recruit members and prepare plans of work for approval by the Board of Managers.

PTA leaders taking care of these tasks, will find it easier to provide exciting and effective activities and programs that will engage and serve your members. Remember to plan, set goals and enjoy the year.