

PTSA Year End Board Transition

Tips for a smooth hand off!!



The PTSA year ends on June 30th and the new year begins on July 1st.

To keep your PTSA operating efficiently and effectively, records and knowledge must be transferred as completely as possible. The transition process is the responsibility of both incoming and outgoing officers and board members.

OUTGOING BOARD RESPONSIBILITIES

Share information and provide support when requested, but allow incoming Board members to bring their new ideas and enthusiasm to effect the change that is essential to your PTSA.

- As soon as the new officers are elected, schedule a transition meeting with all incoming and outgoing board members. Pass on all PTSA information, share your successes and areas for improvement, and review PTSA materials and resources. Introduce incoming board members to key individuals.
- Include incoming board members in the budgeting process. (Budgets for the upcoming year must be approved at a general membership meeting prior to June 30th.) Consider whether a dues increase is desirable.
- Register the incoming officers on PT Avenue (the WSPTA's online membership database). You need to do this even if you are continuing from the previous year. Only enter officers at this time. Send a roster of incoming board members and committee chairs to your Council President.
- Encourage incoming officers to attend Convention and/or other approved trainings. Invite them to attend a Council meeting with you.
- Survey membership to find out what they liked/disliked and what things they would like to see the PTSA involved in next year. Share this information with the incoming board members.
- Make sure your online membership enrollment is correct and reconcile enrolled membership entered with membership fees collected. Download a copy of your membership roster and close the year in PT Avenue between the end of school and June 30th.
- Pay all approved reimbursement requests and invoices prior to June 30th.
- Appoint a financial review committee and make sure the treasurer's records are up-to-date in preparation for the year-end financial review, which should occur as soon as possible after June 30th.
- Update your Legal Documents book.
- Set a date to change the signatures on file at the PTSA's bank.
- Send thank you notes to PTSA volunteers, publish a thank-you in the newsletter, and/or plan a special volunteer appreciation event.
- Inform members of the PTSA's accomplishments during the year.
- Ask all committee chairs to return their updated procedure notebooks and final reports, along with an evaluation.

INCOMING BOARD RESPONSIBILITIES

Give credit to those who have gone before you for the time and effort they have invested. Seek to build on their accomplishments. Bring a fresh perspective, but avoid reinventing the wheel.

- Talk with the current BOD members about their experiences and recommendations.
- Set a working calendar of meetings to review the PTSA's mission, set goals, and plan the budget and calendar for the upcoming year. Once the budget has been developed and approved, coordinate with the outgoing BOD to schedule for approval by the members.
- Agree on ground rules for board meetings and preferences for types and timeliness of BOD communications.
- Attend leadership workshops and training, beginning with the WSPTA Convention in April. Be mindful of the officer training requirements in the standards of affiliation agreement.
- Set planning meeting with school principal and staff (possibly just the President).
- Submit all Facilities Use Requests to the District by June 1st.
- Change names on the signature card at the PTSA's bank after July 1st.
- Verify that the financial review committee has completed the financial review by July 30. Accept and review financial records, minutes, and legal document notebooks after the financial review is complete. Determine whether the recommendations from the financial review should be implemented.
- Review your PTSA's Standing Rules and formulate recommendations for changes, if desired.
- Verify that a copy of the prior year's final membership report has been printed and added to the permanent records.
- Review and sign your PTSA's conflict of interest policy statement.
- Update committee job descriptions, review committee procedure notebooks, and appoint chairs. (Appointments are made by the president and approved by other elected officers.)
- Update your PTSA's website with new board and committee chair names and contact information.
- Review minutes of prior year's meetings and note any unfinished business.