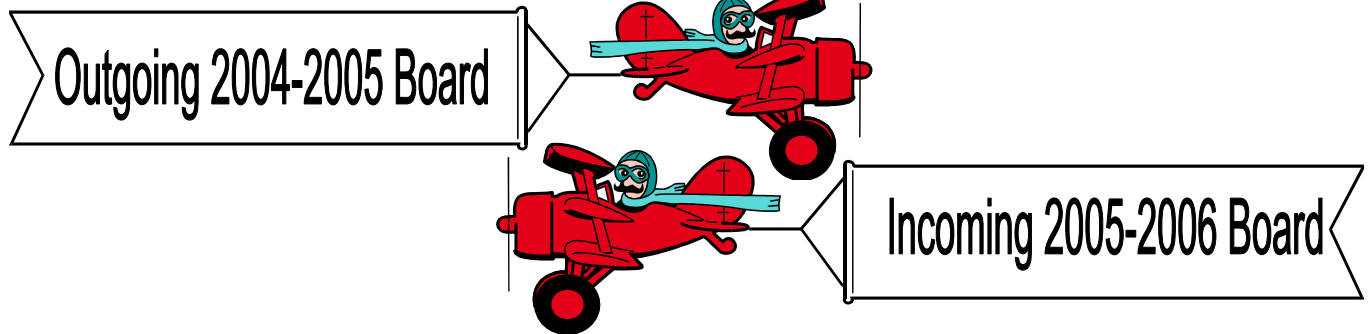


Year End PTA Board Transition



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. The **sharing** of leadership information should begin as soon as the new officers are elected.

2004—2005 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.

- 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 2005-2006 officers.
- Send a roster of incoming officers to your council president (and enter them in the directory section of the KAC website) and register them through the WA State PTA online membership program. You need to do this even if you are continuing from the previous year.
- Pay all reimbursement vouchers and invoices prior to June 30th.
- Appoint an audit committee and make sure the treasurer's records are up-to-date in preparation for the year-end audit as soon after June 30th as possible.
- Make sure your online membership enrollment is correct. Check for duplicates. Reconcile enrolled membership entered with membership fees paid.
- Prior to May 25, pay final membership dues for the year.
- Collect committee procedure books, so that they can be updated.
- Update legal documents books.
- Include incoming officers in budget planning meetings. (Budgets for 2005-2006 year must be approved at a general membership meeting prior to June 30th).
- Hold an orientation meeting and installation for 2005-2006 officers to **pass on all PTA information** and to enable a smooth transition.
- If possible be available to answer questions throughout the year.

2005—2006 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 2004-2005 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, beginning with the WA State PTA Convention May 5th—May 8th.
- 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.
- 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.
- Review committee procedure books and job descriptions and appoint committee chair (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 entered via the WA State PTA online membership enrollment site. You need to do this even if you are continuing from the previous year.
- Make sure procedure notebooks and legal document notebooks are updated.
- Ask questions.

Remember that the single most important thing EVERYONE can do during this time of transition is to be respectful of the other person involved. Honor the fact that this might be a difficult time for them. Help be a bridge during this time. The children will be the direct beneficiaries.