

PTA Year-End Board Transition: Nuts and Bolts

The current PTA year ends June 30 and the new PTA year begins July 1.

One of the most stressful and difficult times of the year can occur during the transition of one PTA board to another. Sharing leadership information should begin as soon as the new officers are elected. Remember that WSPTA Uniform By-laws requires election of local unit and council officers at a general membership meeting prior to **June 30**.



Outgoing Board

Outgoing Officers' Responsibilities

Be available when asked, but allow the incoming officers to bring new ideas, enthusiasm and change that is essential to your PTA's success.

- Schedule a transition meeting with all outgoing and incoming board members.
- Collect committee procedure books so they can be updated before being handed over.
- Update legal documents notebooks.
- Thank your volunteers.
- Inform members of PTA's accomplishments this year.
- Survey membership to find out what they liked or disliked and what projects they would like PTA to work on next year. Share this information with incoming officers.
- Include incoming officers in budget planning meetings. (Budgets for the upcoming year must be approved at a general membership meeting prior to June 30.)
- Send a roster of incoming officers to your council president. Register incoming officers through the WSPTA online membership program. **You need to do this even if you are continuing from the prior year. Only enter officers at this time.**
- Make sure your online membership enrollment is correct. Check for duplicates. Reconcile the number of members entered with the amount of membership fees paid.
- Pay final membership dues prior to **May 25**.
- Pay all reimbursement vouchers and invoices before **June 30**.
- Appoint a financial review committee; make sure treasurer's records are current in preparation for the year-end financial review.
- If possible, be available to answer questions throughout the year.



Incoming Board

Incoming Officers' Responsibilities

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

- Talk with the outgoing officer about his/her recommendations.
- Schedule a meeting with the incoming executive committee and board for orientation and planning.
- Attend the state PTA convention in May to fulfill the training requirement for the next PTA year.
- Set up a planning meeting with the principal (possibly just the president).
- Accept and review financial records, minutes, and legal document notebooks after the financial review is complete.
- Ensure that procedure notebooks and legal document notebooks are updated.
- Change the signature cards at the bank on **July 1** and thoroughly review the budget.
- Be familiar with the proper format for minutes; know which records must be permanently maintained.
- Review your PTA's standing rules.
- Review committee procedure books and job descriptions; appoint committee chairs. (Appointments are made by the president and approved by the other elected officers.)
- Remember the team concept: 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 officers and committee chairs are entered in the WSPTA online membership enrollment site.
- Ask questions. Help is available through your council, region, and state PTA leaders.