



Good transitions = Great starts!

By the Leadership Commission of the California State PTA

The smooth transition of outgoing and incoming board members and officers is of vital importance and can determine your PTA's success for years to come. The transition process is the responsibility of both incoming and outgoing officers and board members. It gives closure to those leaving their positions and allows those coming in to be properly prepared.

Performance evaluation

A good process of transition provides an opportunity for outgoing members to evaluate their work and efforts while giving suggestions to new board members on what they wish they had done differently. Some of the questions outgoing leaders should ask themselves include the following:

- Did the PTA achieve the goals set at the beginning of the school year?
- Were efforts made to include more members in planning and working toward achieving the goals?
- Did PTA membership increase? Were more parents engaged?
- Were association meetings well-attended?
- Did the membership participate in making decisions?
- Was the membership effectively informed of PTA events and programs?
- Were PTA resources and information shared?

Leadership materials handover

Outgoing officers should prepare all materials, records, and resources before turning them over. Update procedure books to include the following:

- List of PTA board members, addresses, phone numbers, and e-mail addresses
- List of names and contact information for those who have held the position in the past
- Current PTA bylaws and standing rules
- Current budget

- Job description for each officer and board position
- Summary of activities, results, and recommendations for improvement
- Reports of work for the year, including any committee reports and explanations of associated costs
- Minutes from all meetings (both board and association) for the past two years
- List of community partners and agencies with which a relationship was established
- Any information felt to be pertinent, especially when it fills in gaps that hindered the outgoing officers and board

Roles and responsibilities

To ensure a successful term of office, certain responsibilities begin as soon as officers are elected. All board members and chairs are expected to:

- Uphold the policies and procedures of the state PTA and National PTA
- Prepare appropriately to fulfill the responsibilities of the office
- Study and follow unit bylaws and standing rules
- Attend and participate in meetings
- Abide by the will of the majority
- Respect the confidentiality of executive board business
- Protect members' privacy and the confidentiality of member information entrusted to PTA
- Meet due dates and fulfill assignments promptly
- Give accurate and detailed account of all monies PTA handled
- Cooperate with others by delegating tasks to appropriate individuals
- Attend conferences, workshops and conventions to develop and strengthen leadership skills
- Maintain a procedure book and appropriate records to pass on to successors
- Resign if unable to perform the required duties of the office

Training and orientation

Encourage new officers to attend PTA trainings, especially the state and national conventions. Local, district, and regional PTAs often hold job-specific workshops tailored to unit needs. Participating in training serves to connect new leaders to a network of experienced leaders who can act as mentors during the year.

An orientation and planning meeting for a new executive board helps a PTA jumpstart the year by offering an opportunity to share ideas, review PTA resources, and create a working calendar. Agreeing on ground rules for board meetings, priorities in working styles, and preferences for types and timing of communication will set the stage for a productive team effort.

Activities of the board-elect may include:

- Registering the officers for convention
- Determining resources and materials needed, and ordering them
- Distributing copies of bylaws and job descriptions, if they were not included in procedure books
- Filling vacancies and ratifying appointments
- Brainstorming to set goals and prepare a master calendar
- Meeting with the school administrator
- Ensuring that the year-end financial report and audit take place so the budget committee can begin to plan

Outgoing officers should give support and information when requested, but they should remember that there is more than one way to do every job. Encourage those who follow to develop their own leadership style. The best reputation PTA leaders can have is to be known as good mentors who taught their successors well and provided the preparation needed for their PTA's continued success.

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The Leadership Commission of the California State PTA can be reached at leadership@capta.org.

Transition basics for officers

- Finish the term.
- Complete all responsibilities, including updating your procedure book.
- Meet with current board to evaluate the activities and outcomes of the previous year. Send new board contact information to your council or district. In your state, local units may wish to use Just Between Friends, PTA's membership management and communications system, to keep track of such information.
- Meet with successor; introduce successor to key individuals.
- Turn over all PTA materials and resources that relate to position.
- Meet with the entire incoming and outgoing board to discuss the future of ongoing projects.

Why you should elect new officers before school ends

Bylaws indicate when elections are held; but it is especially important to elect new officers before the current school year ends, not when the new school year starts.

Here are some of the drawbacks of starting a new school year without new officers.

- Months of transition and planning time are forever lost.
- The program and budget committees have inadequate time to develop and plan prior to the first association meeting, which leaves little time to give notice for and present plans to the membership for approval.
- The PTA executive board must play catch-up. It can take months to feel organized and prepared to lead the association effectively.
- Banking and check writing can be impaired if previous officers have moved on and financial procedures have not been properly addressed at the end of one fiscal year and the beginning of another.
- The transition of officers and chairs after an extended break loses helpful momentum for sharing and passing on information and materials. If past officers or chairs move to another campus or community, materials and procedure books can be lost.
- Newly elected officers miss the opportunity to participate in spring peer trainings that may be provided by the district and council PTA, as well as the National PTA Convention in June.
- Mailings of valuable resources and materials from the state and National PTA are missed or not received in a timely manner.
- The opportunity to promote PTA, build a relationship with the school, and publicize the PTA's role on campus is delayed, and momentum is lost.
- Administrators and school staff may be confused about who the PTA leaders are and how they intend to work with the school community.
- Opportunities are lost for valuable community building, networking, and volunteer recruitment, which normally begin when officers take office.
- The membership campaign gets a late start and cannot take advantage of the enthusiasm of a new school year.
- Students lose the opportunity to participate in Reflections, PTA's fine arts program, because there is inadequate time to plan, kick off, and meet entry due dates.

Find out more

National PTA has several *Quick-Reference Guides*, in English and Spanish, to assist new officers in learning and performing their duties—one for presidents, one for membership chairs, one for treasurers, and one for program chairs. To download these guides, go to PTA.org/reference_guides.asp.