



# Year End PTA Board Transition



**The PTA year ends on June 30, and the new one begins on July 1!**

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.

## **2024—2025 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/PTSA.

- ☐ 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 incoming officers.
- ☐ Pay all reimbursement vouchers and invoices prior to June 30.
- ☐ Appoint a financial review committee and make sure the treasurer's records are up to date in preparation for the year-end financial review as soon after June 30th as possible.
- ☐ Remember that your term runs until a financial review is all clear. Treasurers, don't turn over books to the new treasurer until after the review.
- ☐ Prior to June 15, pay final membership dues for the year.
- ☐ Add new officers to Givebacks and give them Admin Control.
- ☐ Collect committee procedure books, so that they can be updated.
- ☐ Update legal documents. Make sure to change the Stripe administrator in Givebacks if you have a new treasurer.
- ☐ Include incoming officers in bridge budget planning meetings. (Budgets for the next school year must be approved at your September general membership meeting).
- ☐ Hold an orientation/transition meeting and installation for incoming officers to **pass on all PTA information** and to enable a smooth transition.
- ☐ If possible, be available to answer questions throughout the year.

## 2025—2026 OFFICERS' RESPONSIBILITIES

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

- ☐ Talk with the outgoing officer about their 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 Ohio PTA Summer Leadership Conference.
- ☐ 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 financial review is complete.
- ☐ Change the signature cards at the bank only **AFTER** your financial review is complete. Review the budget thoroughly.
- ☐ Be familiar with the proper format for meeting minutes and maintaining permanent records.
- ☐ Review your PTA's standing rules/policies and procedures.
- ☐ Review committee procedure books and job descriptions and appoint committee chairs (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 added to Givebacks. You need to do this even if you are continuing your role from the previous year.
- ☐ Make sure procedure notebooks and legal document notebooks are updated.
- ☐ **KNOW YOUR BYLAWS!** This cannot be stressed enough. In order to conduct the business of your PTA properly, you **MUST** have a firm knowledge of your bylaws. Know them and review them often. Make sure your bylaws are updated every 3 years and are in accordance with the most recent template from Ohio PTA.
- ☐ **Please** ask questions. It is always better to ask than to just "wing it." Need help? Let us help you! No question is too small or insignificant. Your Council and Ohio PTA are here to help you have a successful year!