



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.

2025—2026 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.
- Report Volunteer Hours to OPTA (Service hours, Legislative/Advocacy, and Fundraising) by June 30, 2026. Remember there are a lot of hours behind the scenes for planning and prep work!
[2025-2026 Volunteer Hours Reporting Form](#)
- 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. Plan to attend your PTA Council's financial review party in July if your Council holds one of these.
- Remember that your term runs until a financial review or professional audit is all clear. Treasurers, don't turn over books to the new treasurer until after the financial review.
- **Prior to June 15th, pay final membership dues for the year in Givebacks.**
- Add new officers to Givebacks site and give the President and Treasurer Admin control.
- Collect committee procedure books, flash drives, digital files, etc., so that they can be updated and stored for future reference.
- Update legal documents files.
- Ensure that your [Ohio PTA Standards of Affiliation Checklist](#) is completed and submitted in Givebacks for 2025-2026!!!
- Include incoming officers in bridge budget planning meetings OR ensure all necessary information is passed on to the new officer so they can prepare for their budget planning meeting (Budgets for the next school year must be approved at your August or September

- general membership meeting). See OPTA [Legal and Financial Handbook](#)
- Hold an orientation/transition meeting and installation for incoming officers to **pass on all PTA information and documentation** to enable a smooth transition.
- If possible, be available to answer questions throughout the year by providing an email or phone number.
- Need Givebacks guidance: [Video Tutorials for Givebacks tasks](#)

2026—2027 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 and [National PTA's Thrive Learning Community](#).
 - 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. This can be a meeting between the principal and PTA president or your entire board.
 - Accept and review financial records, minutes and legal document notebooks/files 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 the minutes and maintaining [permanent records](#).
 - Review your PTA's bylaws, standing rules/policies and procedures. [OPTA Sample Unit and Council Bylaws and Standing Rules Resources](#)
 - Review committee procedure books/files, budgets, 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 into Givebacks for the upcoming year.
- *NOTE: You need to do this even if you are continuing in the same role from the previous year.
- Make sure procedure digital files or notebooks and legal document files or notebooks are updated.
 - Check with your outgoing officers to ensure the [Volunteer hours](#) were submitted.
 - Learn what is on the [2025-2026 Ohio PTA Standards of Affiliation Checklist](#) and be sure to have knowledge of how to complete it. (The incoming president completes the form by Nov. 30th.)
 - Review and update as needed your PTA [Conflict of Interest](#) and [Code of Conduct Policies](#) for the new year. The PTA membership and officers vote to accept or make amendments to these policies at the first general membership meeting. The president signs the final approved version of each of these policies.

The sample policies found at these links may be used or changed to best fit your PTA.

- Create or review your PTA's Social Media Policy, Your PTA members will vote to accept the policy and then the president signs the final approved version of this policy. [Sample Council/Unit Social Media Policy](#)
- **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.
- Help with learning Givebacks as an Admin: [Video Tutorials for Givebacks tasks](#)
- Review the [OPTA Summer Packet](#) and the [OPTA Handbooks](#) and review the [PTA Job Descriptions](#)
- Review the [PROGRAMS](#) listed on Ohiopta.org!
- Ask you Region Advisor or the VP of Field Service for the [ohiopta.org](#) password for the protected areas.

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, your Region Advisor, and all of Ohio PTA are here to help you have a successful year!