

Good transitions = Great starts!

The smooth transition of outgoing and incoming board members and officers is of vital importance and can determine your PTA's leadership 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.

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.

- Did the PTA achieve the goals set at the beginning of the term?
- Were efforts made to include more members in planning and working towards 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?

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

- List of PTA board members, addresses, phone numbers and email 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 the position.
- Summary of activities, successful ones and those not so successful with recommendations for improvement.
- Reports of work for the year, including any committee reports and explanations of costs associated.

Transition basics for every officer:

- Finish the term
- Complete *all* responsibilities (including updating your procedure book).
- Meet with current board to evaluate the term.
- Send new board contact information to your council or district.
- Meet with successor; introduce successor to key individuals.
- Turn over *all* PTA materials and resources that relate to position.
- Incoming and outgoing boards meet together.

- Minutes from all meetings (both board and association) for the past year or two.
- List of community partners and agencies with whom a relationship was established.
- Any information felt to be pertinent, especially things you wish you had known before starting the job.

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

- Accept office or position only when willing to uphold the policies and procedures of the State and National PTA;
- Accept office only when willing to prepare oneself 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 privacy of the business of the executive board;
- Protect members' privacy by allowing no distribution of membership lists to outside interests;
- Meet due dates and fulfill assignments promptly;
- Give accurate and detailed account of all monies entrusted to them;
- Delegate instead of doing everything;
- Develop and strengthen leadership;
- Attend conferences, workshops and conventions;
- Maintain a procedure book to pass on to one's successor; and
- Resign if unable to perform the required duties of the office.

Encourage new officers to attend PTA training, especially the annual conventions (organized both by National PTA and most state PTAs). Local district or regional PTAs often hold job-specific workshops tailored to unit needs. Participating in training connects new leaders to a network of experienced leaders as mentors to call upon during the term.

An orientation and planning meeting for a new executive board helps a PTA jump start the year right 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 timeliness of communication will set the stage for a productive PTA team effort.

Activities of the board-elect may include:

- Register the officers for convention.
- Determine resources and materials needed, and order them.
- Distribute copies of bylaws and job descriptions, if they were not included in procedure books.
- Fill vacancies and ratify appointments.
- Brainstorm to set goals and prepare a master calendar.
- Meet with site administrator.
- Assure that year-end financial report and year-end audit take place so budget committee can begin to plan.

Outgoing officers should give support and information when requested but 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 a PTA leader can have is to be known as a good mentor who taught their successor well and provided the preparation needed for continued success of the association.



Essential to make sure elections are conducted before the year ends

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

If the new school year begins *without* new officers ...

1. **Months of transition and planning time** is forever lost (because the new board can begin meeting and planning right after the annual election).
2. **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 its required approval.
3. **The PTA executive board must play catch-up.** It can take months to feel organized and prepared to effectively lead the association.
4. **Banking, check signatures, and bill paying 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.
5. **The transition of officers and chairmen** after an extended break loses the momentum of sharing and passing on information and materials. If past officers or chairmen move to another campus or community, materials and procedure books often become lost.
6. **Newly elected officers miss the opportunity** to participate in counterpart training often provided by the district and council PTA in the spring, as well as convention and other workshops.
7. **Mailings of valuable resources and materials** from National and the state PTA are missed or not received in a timely manner.
8. **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.
9. **Administrators and school staff may be confused** as to whom the PTA leaders are and how valuable the PTA/PTSA is to the school community.
10. **Opportunities for valuable community building**, networking, and volunteer recruitment, which normally begin when officers take office, are lost.
11. **The membership campaign gets a late start** and can't take advantage of the enthusiasm of a new school year.
12. **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 deadline.