



## Tips for your PTA Leadership Transition

*As the school year draws to an end, PTA leaders are busy with many activities and events. Take time to look at the wonderful things your PTA has accomplished this year and express appreciation to those who have worked for the PTA and for children.*

*This list of important transition tasks will help assure smooth progress to get the PTA ready for the next year.*

- Current officers and committee chairs should complete their end of year reports, collect their materials and procedure books, and pass them on to their successors. (Please remember that PTA materials belong to the PTA and not to the individual person.)
- The treasurer should pay all bills, settle all accounts, and be sure records are ready for the audit.
- An audit committee should be appointed and prepare to audit the treasurer's books in a timely fashion.
- Unified Local PTA/PTSA bylaws were reviewed and any suggested amendments by your membership along with your Bylaws Review form should be emailed to [bylaws@azpta.org](mailto:bylaws@azpta.org).
- Attending convention or summer leadership classes is a great way to prepare for the new terms of office. This is especially important for NEW leaders. Annual training for all officers is mandatory!
- After elections, Officer List should be filed with the Arizona PTA and within 10 days of any change in officers. Officers List can be found here:  
[http://azpta.org/members/leader\\_forms/officers-list.html](http://azpta.org/members/leader_forms/officers-list.html)
- Signatures on the PTA bank account should be changed to the new check signers as per your standing rules/bylaws as to whom in your PTA is authorized to sign checks. **(Remember, all checks must be signed by two board members as designated by your standing rules/bylaws, Arizona PTA standing rules and our AIM insurance)**
- The new officers should be installed and outgoing or retiring leaders should be thanked for their service.
- New committee chairs should meet with their predecessors, and review materials that have been passed on in their procedure books.
- The new Board should meet and set goals for the PTA for the upcoming year.
- Plan the calendar for the upcoming year for membership meetings, board meetings, special events, fundraisers, etc and be sure to file facility requests with the principal.
- The treasurer and other officers and committee chairs should prepare a proposed budget for the upcoming school year. The PTA budget should reflect those goals. It will be approved at your first general meeting in the new school year.
- Committee chairs should recruit members and prepare plans of work for approval by the Board.
- PTA leaders taking care of these tasks will find it easier to provide exciting and effective activities and programs that will engage and serve your members. Remember to plan, set goals and enjoy the year!