PTA Leadership Transitions

Unit/Council Leadership Transition Document

Being an effective leader and productive team member is also essential for all board members.

• Here are the things I did do during all or most of my term in office year that my successor should know and practice.

• Here are the things I wish I did all year—had I known then what I know now—that my successor should know and practice.

• Here are the things I suggest that my successor address during the first 30 days of their term of office

• Here are the things that I think would instill an effective unit/council board and help to conduct productive board meetings.

• This is my final thought(s) to the new board leadership team—that may or may not have been covered above—for the good of the order.

The Outgoing board should always:

1. Complete an end-of-the year checklist
2. Meet to debrief & evaluate the work for the year/offer suggestions for improvements
3. Fully complete your term (and tasks)
4. Meet your successors
5. Update your Officers in MemberHub to reflect the new school year using the Add Officers button even if some officers are remaining in their current role
6. Turn over all resources and materials in a timely manner
7. Host a get together honoring the outgoing board & celebrating the upcoming journey of the new board (it’s a celebration, a passing of the torch)

The incoming board should always:

1. Register for Region Training Events and NYS PTA training- Summer Leadership Conference (SLC) & Convention
2. Order any necessary materials and supplies
3. Fill any vacancies and/or appoint chairmen if necessary
4. Work on your goals for the year and develop your calendar of events
5. Meet with school administration
6. Ensure that end-of-the-year financial and audit reports are complete to begin your budget work

* At the end of the day, outgoing officers should give their support to the new board, ensuring that they step back & let go as well.