

# 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
5. Turn over all resources and materials in a timely manner
6. 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.