

### Transitions for New Presidents by Ruby Kalra for PTA Council Transition Meeting, 6/3/15

1. Create Executive Board Roster and submit to CA PTA through PTA EZ. Make sure that Council PTA also has a copy of your roster.
2. Decide on committee chairs and create a committee chair roster. Standing committee chairs are part of the executive board. Call all committee chairs – thank them for service, ask if they would do it again the next year, and if not, get them to provide the notebook with a summary including what worked well, what needed changing, and possibly provide a successor from their committee. Start working with committee chairs for committees that start up right away such as New Family Orientation, Reflections, Teacher Appreciation Luncheon, etc.
3. Make sure that everyone has their Job Descriptions from PTA tool kit and set up an “In and Out event” with old/new EC. Encourage board to also attend the PTA Council Transition Meeting in June and your unit’s last EC meeting as well.
4. Chair people and EC need electronic packets (reimbursement forms, cash verification forms, calendar, roster, etc) Try to help to ensure that former chairs pass on any info to new chairs.
5. Create Calendar – need to confirm dates of Back to School Night, any registration dates and PTA meeting schedule with principal. Sylvia Carroll needs to know our calendar and should highlight any events with risk (alcohol). PTA Council should also have a copy of the calendar to make sure we don’t double book ourselves! Need to fill out Facility Use form to reserve any rooms at school site or district site for all our PTA meetings.
6. Meet with incoming board – Our Mission? Our Focus? Our Objectives? How do we populate holes in Committee Chair positions? New events? Calendar planning. Review preliminary budget. Have everyone sign the Whistle Blower form.
7. Build a preliminary budget prior to the last meeting of the year (June PTA association meeting) – need to vote to have money for summer expenses and to change check signers. Coordinate last PTA meeting agenda with out-going PTA president, **show preliminary budget, get approval for change of check signing, do installation** of next year’s board. Make sure that the **minutes reflect the change in check signing signatures so they are available to take to the bank.**
8. Bank visit for check signing (Treasurer and President and who else is in the bylaws.) Usually the bank will ask for 2 forms of identification, minutes from last meeting signifying change in check signers, and a copy of your unit PTA’s non-profit status designation letter from the US Dept of Treasury.
9. Encourage people to go to PTA Convention and/or First District Leadership Training.
10. Look at PTA website and make any changes for the new school year.
11. Write something for last newsletter if pertinent (Registration process and 1<sup>st</sup> president’s message)
12. Summer audit, close books, and no checks can be written until audit completed.

13. Need to get Registration Materials ready (PTA pres letter, volunteer form, etc)and coordinate with school principal any volunteer staffing needs.

14. First Day of School Welcome Back Coffee – coordinate food/coffee /location with Hospitality Chair.

15. First meeting of the year will need to approve minutes, audit, budget and calendar. Approve checks. Introduce EC and Major Chairs to tell about their events and call for volunteers.

16. Consider setting up a monthly meeting with school principal for ongoing communication.