

HELP YOUR SUCCESSOR SUCCEED: *THINGS TO TURN OVER DURING TRANSITION*

Resources

Procedure book which should include the items in the categories below, job descriptions from both the Toolkit and bylaws/standing rules, and *Communicator* or newsletter articles pertaining to the position.

California State PTA *Toolkit* (hard copy)
Parents Empowering Parents (PEP) Guide
National PTA's *Quick Reference Guides*
Our Children magazine (past issues)
PTA in California (past issues)
Communicator (past issues)
CD of Convention Handouts
Insurance and Loss Prevention Guide
List of "where things are" (storage facility, mailbox, etc.)

Contact Information

Current, outgoing board list (and previous year's lists)
Copy of Nominating Committee Report
Contact information for the district PTA and council PTA (if in council)
Names and contact information for school districts, county office of education, and allied agencies in the area
List of relevant websites

Data and Reports

Calendar of due dates for current year
Membership totals for current year and several previous years
Annual Historian Reports (with supporting pictures, etc.)
Reports and samples/flyers of invites/programs from any events or programs

Financial

Budget for (at least) current year (and last 3 years)
Audits for at least one year (and finalized arrangements for summer audit)
Year End Financial Report (arranged for)
990s and other legal filings (as part of the permanent records)

Communications

Copies of all newsletters from at least one year
Agendas from meetings for past year
Copies of minutes from past years (as part of the permanent records)

Bylaws

Copy of current adopted bylaws and standing rules