



KEYS TO A SMOOTH TRANSITION for PTA LEADERS

Finish the term.

Do not stop fulfilling the duties and responsibilities of the position simply because a successor has been named.

Complete any final responsibilities.

Complete the Annual Report.

Ensure the audit and year-end financial report are completed.

Update your procedure book. Remove old, outdated materials.

Meet with current board to evaluate the term.

Review successes and include recommendations for next term.

Meet with your successor.

Review expectations, duties and responsibilities of the position.

Maintain your interest and concern, but don't dictate because of past experiences.

Review your procedure book and files.

Invite your successor to a current board meeting and to council and district PTA meetings.

Provide your successor with dates for the California State PTA Convention and other training opportunities.

Send your successor's name and contact information to council/district PTA by the directory deadline.

Turn over all PTA materials and files that relate to the position.

Remember there is more than one way to do a job.

Encourage those who follow to develop their own leadership style.