



Transition Checklist

Creating a smooth transfer of leadership responsibilities ensures that your PTA remains healthy and active—and that children continue to benefit. An incumbent president should:

- Meet with the incoming leadership team**—Discuss the past year’s successes and failures, the coming year’s objectives and expectations, and how to facilitate the transition; help the new leaders get to know the community, its people, its goals, and its traditions.
- Arrange meetings with contacts**—Make personal introductions for the new team to the principal, teachers, community leaders, and others; emphasize everyone’s commitment to continue serving the needs of children.
- Hand over records**—Pass along the procedure book and other pertinent records; make sure all passwords and account information (for banking, e-mail, etc.) changes hands as well.
- Introduce new team to the membership**—It’s just as important for the new team to meet the membership as it is for them to meet contacts; also encourage the incoming leaders to meet members outside of meetings and to have informal discussions with the board.
- Change contact information**—Update names, e-mail addresses, and the rest on your website, official records, and in your membership database.