

LEADERSHIP TRANSITION

How to successfully transition the leadership of your PTA from one board to the next.

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Virginia
PTA[®]

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DEVELOPING FUTURE PTA LEADERS



Begin with Your Last Day in Mind

Start planning at the beginning of your term for your own smooth transition out of office. Think about the history of your own PTA – what pops into your head? How would you like to be remembered?

Part of being a successful PTA leader is ensuring that your replacement has all the tools they need to be successful. Successful leaders = successful PTAs!

Our Presidents have a responsibility to ensure the future viability of their PTA – and offering opportunities for leadership development to your board members grows the number of qualified candidates for your Nominating Committee.

Growing Your Board through Leadership Development

- Ask them to join you in a meeting with your principal and/or teachers
- Give them an opportunity to build a relationship with a new partner or sponsor
- Bring them with you to Council and District meetings
- Encourage them to take National PTAs E-learning Courses
- Nominate them to chair a special committee
- Make them part of your group to attend Virginia PTAs Annual Conference to take Leadership Training workshops

THE ROLE OF AN OUTGOING LEADER



Communication is Key

- Meet with incoming leadership. Discuss what worked and what didn't. Help them get to know your community and people.
- Arrange meetings with your partners.
- Hand over the records and materials.
- Hand over your procedure books (including bylaws and Standing Rules)
- Introduce your new leadership team to your membership.
- Change contact information.

End of Year PTA Business

Elections: current President runs the election (*even if they are running again*)

Annual Audit:

- Current President and Treasurer complete the Financial Management Checklist section of the Audit Report (located at www.vapta.org) and arrange for an audit committee or auditor to review your books. If the incoming Treasurer and/or president are not signers on the PTA bank account, they may serve on the Audit Committee.
- Communicate the plan with new leadership!
- New leadership presents the completed audit to your new Executive Board and then to your General Membership (usually at a BTS meeting). It is signed by your new President and Treasurer.

SUPPORTING NEW LEADERSHIP



Outgoing Leaders ... now what??

The election is over, your term has ended and your new leaders have all of the tools they need to start another great PTA year for your school community. What's a past PTA leader to do?

- Be available to your new Board for questions.
- Be a supportive PTA member and celebrate their successes.
- Enjoy these rewards of a job well done – your work to ensure a smooth transition helps your new PTA leaders succeed!
- Continue your PTA career by joining your Council or District board ... or our Virginia PTA leaders!

Incoming Leaders ... what's next?

The election is over and you are communicating closely with the outgoing board – meeting your school community and becoming familiar with the bylaws, history and records of your PTA. Using this information, your first steps in office are:

- Develop goals for your PTA
- Appoint your committee chairs
- Set your calendar for the year
- Ensure that your contact information has been shared
- Utilize our PTA training resources – Back-to-School Kit from National PTA, Training Library from Virginia PTA

Support the work of your past PTA leaders, and learn from their experiences. Reach out to your Council and District, and to Virginia PTA any time for support –you have a network of PTA people to help you!

NETWORKING ACTIVITY



Our Objectives – can you ...

- Describe ways to develop the future leaders of your PTA
- List the actions an outgoing officer can take to ensure a smooth transition
- Identify the ways new PTA leaders can be supported

Talk with your Neighbor

- Where are you in this process?
- What can you do as a new leader now? What can you do at the end of your term to ensure a smooth transition?
- If your transition into leadership was not smooth, what can you do for your next leader to make their transition - and your PTA - more successful?

RESOURCES



Resources

www.vapta.org our
Virginia PTA website

info@vapta.org our
Virginia PTA office

Council PTA

District PTA

www.pta.org
National PTA website
and
www.ptakit.org
Back-to-School Kit

THANK YOU
