

YEAR-END CHECKLIST & TRANSITION GUIDANCE

As a PTA leader, there are several key things you must do before the end of the school year. By completing these tasks, you help your successor start off on the right foot, while you enjoy your summer guilt-free.

- Meet with your successor as soon as possible. If you do not have a successor yet, plan to meet with them later. In advance of the meeting, prepare a timeline of the past year. Cover the job basics, the timeline, a summary of where things stand now, etc. Schedule a follow-up turnover meeting, if needed.
- Hold elections! Email the new officers' contact information to office@LouisianaPTA.org no later than May 25.
- Pay any remaining outstanding membership dues at LouisianaPTA.org/membership.
- Close out your books on June 30. Make sure all reimbursement requests are submitted in time for you to write checks before the books close. Ask about any outstanding checks not yet cashed.
- Go to the bank with the new Board members and switch account signature responsibilities, as necessary. Make sure the right people are on the bank account for the incoming year.
- Make sure Treasurer's Year-End Checklist is complete.

Notes to pass on to your successor:

- Things I did during my term in office that my successor should know and practice
- Things I wish I did all year (had I known then what I know now) that my successor should know and practice
- Things I suggest that my successor address during the first 30 days of their term of office
- Things that would instill an effective Board and help to conduct productive Board meetings
- My final thoughts to the new Board leadership team for their success

The Outgoing Board should always:

- Meet to debrief and evaluate the work for the year and offer suggestions for improvements
- Fully complete your term and tasks
- Meet your successors
- Update all Officers at LouisianaPTA.org/submit-officer-data-1 for the new school year even if some officers are remaining in their current role.
- Turn over all resources and materials in a timely manner
- Host a get together honoring the outgoing Board and celebrating the upcoming journey of the new Board
- The outgoing officers should support the new Board, as well as step back and let go.

The Incoming Board should always:

- Create a profile at PTA.org.
- Register for LAPTA Training Events and attend the LAPTA Annual Meeting.
- Familiarize yourself with information available at PTA.org and LouisianaPTA.org.
- Register at LouisianaPTA.org/submit-officer-data-1.
- Order any necessary materials and supplies.
- Fill any vacancies and appoint chairpersons if necessary.
- Work on your goals for the year and develop your calendar of events.
- Meet with school administration.
- Ensure that year-end financial reports are complete to begin your budget work.

