



Officer Transition Planning Checklist

As the school year winds down, it's time to ramp up officer transition planning. Use this checklist to make sure the handover from outgoing to incoming officers is smooth sailing. And, don't forget to follow any guidance from your State PTA.



PRIOR TO OFFICER ELECTIONS

New leader installation is around the corner. Start preparing by:

- Updating and organizing your digital files including:
 - Flyers, posters, and other promotional materials
 - Program planning documents, sign-up sheets, and other notes
- Confirming information for key contacts is accurate and adding it to handoff materials
 - Officers
 - Vendors
 - Committee chairs
 - School staff
 - Volunteers
 - School district leaders
- Having outgoing leaders create overviews of:
 - Responsibilities and day-to-day activities
 - In-progress projects with status reports
 - The tools they rely on
 - Tips and advice for their successor

AFTER OFFICER ELECTIONS

Get new leaders ready for the school year:

- Grant newly-elected leaders access to digital files and technology including:
 - The shared calendar outlining important dates and events
 - Software platforms and tools
- Hold a transition meeting with all new, current, and outgoing leaders. Review and update policies and procedures documents including:
 - Organization bylaws
 - Detailed officer role descriptions
 - Meeting agendas and minutes
 - Frequently used handouts and templates
 - Budget and financial information
 - Transfer your bank signatory if necessary
- Have one-on-one meetings to:
 - Pass off, review, and discuss officer binders and leader-specific documents
 - Share ideas for the new school year
- Announce new leaders and introduce them to contacts and partners

