



## **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 Remove old, outdated materials.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.