

First tasks for new PTA officers and chairmen

The president-elect should confer with the school principal and call meetings of the board elect (elected officers and principal) soon after election. At the first of these meetings ratify appointed officers, fill any vacant offices and make plans for the coming year. Strive for a balance of experienced and new members, keeping in mind that all areas of the community should be represented. When appointed officers are ratified, they become part of the board-elect and are included in planning for the upcoming term.

1. Consider a membership survey to be returned prior to the end of the school year where past unit activities are reviewed and suggestions for new activities are solicited.
2. Use input from the survey for brainstorming session(s) with the board-elect to establish board goals. Set realistic goals and prioritize projects.
3. Set a calendar for the upcoming year and provide membership campaign materials to the school for any summer mailings they may be planning.
4. Request the outgoing president's and officers' procedure books prior to taking office. Review them along with all other material received.
5. Become familiar with the duties of each chairman by reviewing the *California State PTA Toolkit*. Share job descriptions and materials as noted with the chairmen and help them to secure procedure books and materials from their predecessors.
 - If they fail to receive procedure books, assist them in setting up their own.
6. Consider reviewing the PTA bylaws with the entire board (even if they are newer than three years). The bylaws contain many job responsibilities and timelines/due dates. Reviewing them together gets everyone on same page with the same expectations.
7. Encourage every board member to attend trainings, either at convention or those offered by council or district PTA.

8. Prepare a preliminary budget and present it for adoption at the last association meeting of the year.
9. Verify with outgoing board that the year-end Annual Financial Report has been completed after the books are closed, that arrangements have been made for the annual year-end financial report, the year-end audit, and that documents have been compiled for ease in preparing tax filings.
10. Coordinate with treasurer-elect to have the signature cards for bank accounts updated with new officers (as indicated in the unit bylaws) and submitted to the bank at the beginning of the new term (after June 30th).
11. Send names and addresses of additional board members to council and/or district PTA for their respective directories.
 - Make sure each of your board members knows how to contact their counterpart at district (or council) to get questions answered.

