

## Things to turn over during transition

### Resources

- **Procedure book** should include the items in the categories below, job description from *Toolkit* and bylaws/standing rules, *The Communicator* and newsletter articles pertaining to the position
- Toolkit (CAPTA.org)
- *Parents Empowering Parents* (PEP) Guide
- *PTA in California* (archived at CAPTA.org)
- *Copies of any training materials received during the term*
- *Insurance Loss and Prevention Guide*
- National PTA's *Quick Reference Guides*
- *Our Children* magazine (past issues)
- List of where things are stored and passwords for electronic media (storage facility, mailbox, internet service provider, electronic newsletter service, etc)

### Contact information

- Current, outgoing board list (and previous year's lists)
- Copy of nominating committee report
- Contact information for district PTA and council PTA (if in council)
- Names and contact information for school districts, county office of education, any allied agencies in the area
- List of relevant websites

### Data and reports

- Calendar of due dates for current year
- Membership totals for current year and several previous years
- Annual unit historian reports (with supporting pictures, etc)
- Reports and samples/fliers of invitations and other materials/programs from any events or programs

### Financial

- Budget for current year and previous two years
- Audits for at least one year (and finalized arrangements for summer audit)
- Year-end financial report (arranged for)
- List of governmental assigned numbers: Federal employer identification number (EIN), California state entity number, California charitable trust number, etc
- Copies of IRS *Form 990s*, California *Form 199s*, California Registry of Charitable Trust RRF-1s, and other legal filings (as part of the permanent records)

### Communications

- Copies of all newsletters for the past year
- Agendas from meetings for past year
- Copies of minutes from past years (as part of the permanent records)
- Copy of current bylaws and standing rules