



President: Am I done yet?

Outgoing Tasks

- Elections done or upcoming
- Update new and returning officers with Florida PTA
 - Compliance requirement
- Schedule a meeting with your treasurer & secretary
- Schedule the final 2023-2024 board meeting
- Schedule a meeting with the new president
- Organize your binder, clean up the email and shared drive

Final Board Meeting of the Year: Wrap Up Old Business

Invite incoming board members to the final board meeting of the year

Outgoing board members should turn over binders, passwords, and email to the incoming officer

Set a date for calendar meeting, summer planning meeting, and budget meeting

All board positions should provide final report and review any final tasks for the end of year

Ask for volunteers to clean up the PTA room

And just like that, you're done!

Purpose: Review the role of president

Old President/ New President



- Prepare your binder
- Use a checklist
- Update new officers in Memberhub and assign new administrators
 - Update Stripes account
- Review any open items that they may need to finish
- Review anything specific to your unit
- Provide a monthly task checklist
 - Include dues dates for compliance items
 - Due dates for items specific to your unit
- Encourage them to attend PTA trainings local or state

Secretary – FINAL NOTES!







Outgoing Tasks







Minutes & Agendas

- All are present
- Copies provided to President & Treasurer



- Be custodian of records
- See FLPTA Retention Schedule



Records Retention Schedule

It is very important that certain records be retained. It helps to develop a records retention It is very important that certain records be retained. It neips to develop a records retention policy. Listed on this page are items that should be reviewed on a periodic basis and kept in a

Annual financial review (audit) reports Board members/Officers Bylaws, including all amendments Cash receipt records Checks (canceled) Contracts and leases (expired) Contracts and leases still in effect Correspondence (general) 7 years Correspondence (legal) 7 years Duplicate deposit slips Permanently Equipment owned by the PTA Financial statements (year-end) and budgets 3 years Permanently Grant award letters of agreement Insurance records, accident reports, claims, policies, certificates 7 year Permanently Inventories (products and materials) 10 years IRS Information (990) Returns 10 years Permanently Minute books of directors and committees 7 years 7 years 7 years Permanently

Note: PTA board members have a fiduciary responsibility to protect sensitive and confidential information. Any documents with personal information or cancelled checks (and copies of



Bank Signer

• Provide signed copies of minutes to the new signers to bring to the bank

Send

 Contact information to new board members

Check

- Check when bylaws expire
- Standing rules are in your binder/digital file



Old Secretary / New Secretary



- Prepare your binder
- Use a checklist
- Review anything specific to your unit
 - Example specific format for minutes
- Set a date to get final set of signed minutes
- Include a monthly task checklist
- Encourage them to attend PTA trainings



THANK YOU



2024-2025 HCCPTA EXECUTIVE BOARD

Kimberly McDonough - President president@hccptaptsa.org

Deborah Vandeveer - Secretary secretary@hccptatptsa.org

Jessica Bricker - Treasurer treasurer@hccptaptsa.org

Erica Hamblen - VP of Local Units vpareas@hccptaptsa.org

Ami Marie Granger Welch - VP of Advocacy vpadvocacy@hccptaptsa.org

Jenny Mun - VP of Operations vpoperations@hccptaptsa.org

Quan Remmer - VP of Training vptraining@hccptatptsa.org