

# PTA Transition Checklist



- ✓ Enter all incoming officers in MemberHub
- ✓ Update Bank account signatures (checks must have two signatures, best practice is three signatures on file)
- ✓ Audit financial records after June 30<sup>th</sup> completing and uploading the audit form
- ✓ Review bylaws, check when bylaws last updated and resubmit copies to Tennessee PTA at least every five years
- ✓ Prepare a proposed budget. (These will need to be approved by your membership before funds are spent.)
- ✓ Meet as a new board to plan programs and events. (These will need to be approved at the first general meeting.)



- ✓ Attend PTA virtual and face-to-face training
- ✓ Gather job descriptions, plans of work, program evaluations and other documents/files from outgoing board members to share with new board members.
- ✓ Setup MemberHub store including online membership options
- ✓ Prepare a membership plan to reach out to new and returning members
- ✓ Review the Tennessee PTA Leadership Achievement form to help plan PTA year
- ✓ Register for Back to School kit from National PTA
- ✓ Attend National PTA eLearning courses