

President & Secretary



Year End Prep
2023-2024



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!

Old President/ New President



Purpose: Review the role of 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

Keep

- Be custodian of records
- See FLPTA Retention Schedule

Bank Signer

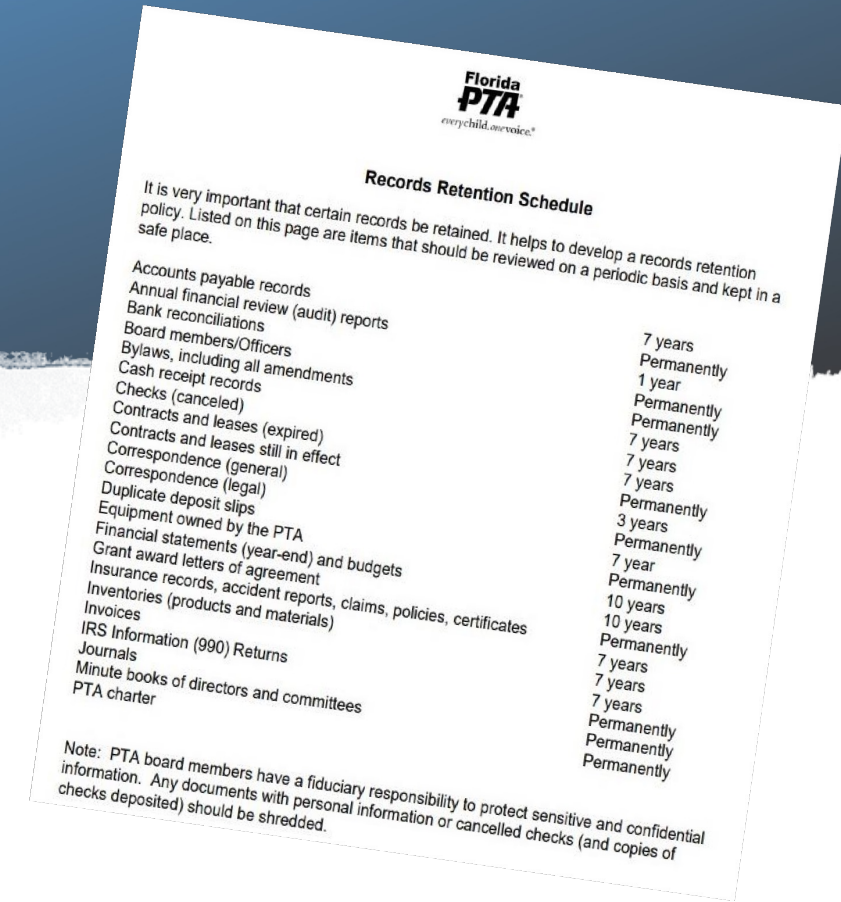
- Provide signed copies of minutes to the new signers to bring to the bank

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

FINISHED

THANK YOU



2024-2025 HCCPTA EXECUTIVE BOARD

Kimberly McDonough - President
president@hccptapta.org

Deborah Vandever - Secretary
secretary@hccptapta.org

Jessica Bricker - Treasurer
treasurer@hccptapta.org

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

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

Jenny Mun - VP of Operations
vpoperations@hccptapta.org

Quan Remmer - VP of Training
vptraining@hccptapta.org