

**2016-2017 PTA Leader**

**Year End Checklist**

As a PTA Leader, there are several key things you must do before the end of the school year in June 2017. By completing these tasks, you help your successor start off on the right foot, while you enjoy your summer guilt-free.

# I. Turnover Tasks

* Arrange to meet with your successor as soon as possible-- no later than May 27 (if you don’t have a successor yet, please plan to meet with them once s/he is finalized).
* In advance of the meeting, prepare a timeline to hand over to your successor.
* Complete your Year End Report. It will make your turnover meeting much more effective!
* Meet with your successor. Cover the job basics, the timeline, a summary of where things stand now, etc.
* Schedule a follow-up turnover meeting, if needed.
* Email your Year End Report to your successor and our current PTA President (president@cherrychasepta.com) no later than May 25. President will keep it to better understand your position and to give to your successor if he/she hasn’t yet been chosen.

# II. End of Year Tasks

* By March 1st, review the current budget and let your VP and the Finance VP ([dgu11223@yahoo.com](mailto:dgu11223@yahoo.com)) know if you plan to be over or under budget.
* By April 1st, please let your VP and the Volunteer Coordinator VP (volunteercoordinator@cherrychasepta.org) know if you plan to return to your position next year or not. *Either way, we truly thank you for all you have done for the school!*
* By May 1st, submit all Payment Request Forms via the PTA Nook.

*\*\*Expenditures after May 1st must be pre-approved by the President. NOTE: Payment requests after June 1st (even with pre-approval) may not be paid until August 2017 due to balancing the books at the end of the year and the changing of leadership.\*\**

# III 2016-17 Year End Important Dates

March 1 Inform your VP and Finance VP ([dgu11223@yahoo.com](mailto:dgu11223@yahoo.com)) if you plan to be over or under budget

March 21 PTA Meeting to elect new officers and discuss budget

April 1 Inform your VP and the Volunteer Coordinator VP (volunteercoordinator@cherrychasepta.org) if you plan to resume

your position next year

May 2 Payment Request Forms due (expenses after this date need pre-approval)

May 16 PTA Association Meeting to recap the year and vote on the budget (final mtg)

May 27 Final Day to turn in Year End Reports (meet with your successor prior to May 27)

June 8 Last Day of School

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**2016-17 Year End Report**

**LEADERSHIP POSITION:**

**NAME(S):**

**EMAIL(S):**

1. **Purpose -** *Briefly describe the purpose of your position:*
2. **Accomplishments -** *Please describe your accomplishments, how you achieved*

*them, and any recommendations on how to continue to improve upon them:*

1. **Challenges -** *Please describe any challenges you encountered, how you addressed*

*them and how you would recommend they be handled in the future:*

1. **Budget -** *Please attach a detail of actual expenses incurred and provide notes if there*

*are major expenses that should be considered in the future:*

1. **Contacts** *- List all contacts necessary for this position; include names, addresses,*

*phone numbers and email addresses for important contacts, facilities, donors, etc.:*

1. **Volunteers** *– If you needed additional volunteer assistance, please describe in detail:*
2. **Support Materials** *- Provide all paperwork, flyers, surveys and other pertinent*

*documentation. Please provide them in soft copy form. If you have only hard copy, provide 2 copies of each document. One copy will be provided to your successor and the other will be given to the incoming President.*

1. **Timeline** *- Attach a timeline for your position (or type in below). The more detail the*

*better. This is one of the most important pieces of information for your successor(s).*