

Click here for the training presentations:

Spring Training 2022-23

AGENDA

11:00 - 11:05 Welcome

11:05 - 11:35 President & Secretary

11:35 - 11:40 Break

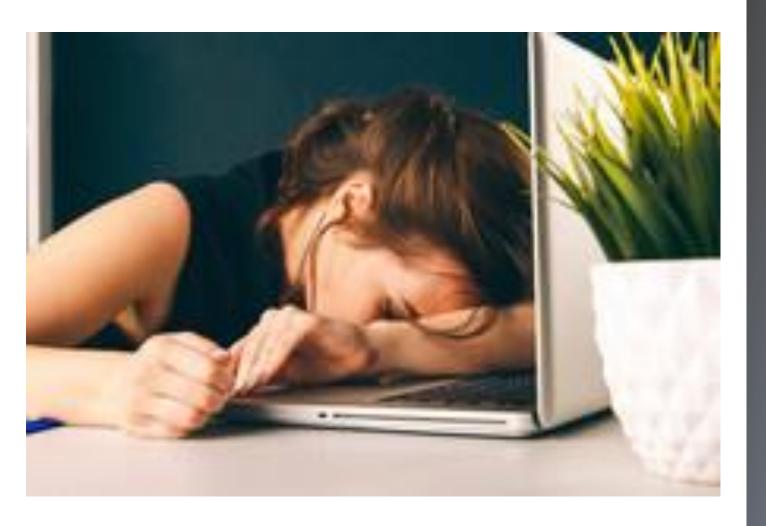
11:40 - 12:30 Treasurer

12:30 - 1:00 Q&A





Year End Prep 2022-2023



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 2022-2023 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





Records Retention Schedule

It is very important that certain records be retained. It helps to develop a records retention policy. Listed on this page are items that should be reviewed on a p

should be reviewed	develop a record-
Accounts payable records Annual financial a	on a periodic basis and ke
Annual financial	susis and ke
Bank reconciliant review (audit) roman	
	-
Board members/Officers Bylaws, including	7 years
Cash including all amond	Permanenti
Bylaws, including all amendments Cash receipt records Checks (con-	1 year
	Permanently
Contracts and leaves	Perman
Contracts and leases (expired)	Permanently
Correspond	7 years
	7 years
Duplicate de (legal)	7 years
Equipment Slips	Permanenti
Equipment deposit slips Equipment owned by the PTA Financial statements (year-end) and budgets Insurance records	o years
Grant Statements (Van	Permanently
Grant award letters of agreement Insurance records, accident	7 year
insurance records agreement	Permanently
Inventories (productional reports of the control of	10 via liently
Inventories (products and materials) INS Information (products and materials)	10 years
Insurance records, accident reports, claims, policies, certificates IRS Information (2002)	10 years
Journals (990) Returns	Permanently
Minute books of directors and committees	' years
PTA chart of directors and	/ years
charter and committees	/ Vears
	Permanenti
1-1	Permanently
lote: PTA home	D

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



- 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



THANK YOU



CONTACT US

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