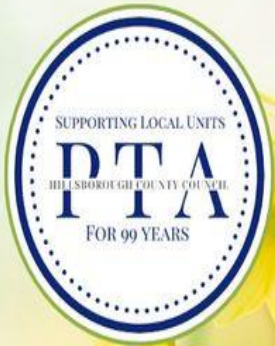


# Welcome!

HILLSBOROUGH COUNTY COUNCIL PTA/PTSA

## Virtual Leadership Series

Sunday, April 23rd - 11am  
Zoom Registration Required



Presented By:  
Ami Marie Welch  
President

Erica Hamblen  
Treasurer

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

*President & Secretary Training – Erica Hamblen*

*Treasurer Training – Stacy Keller*

# President & Secretary



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!



# 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

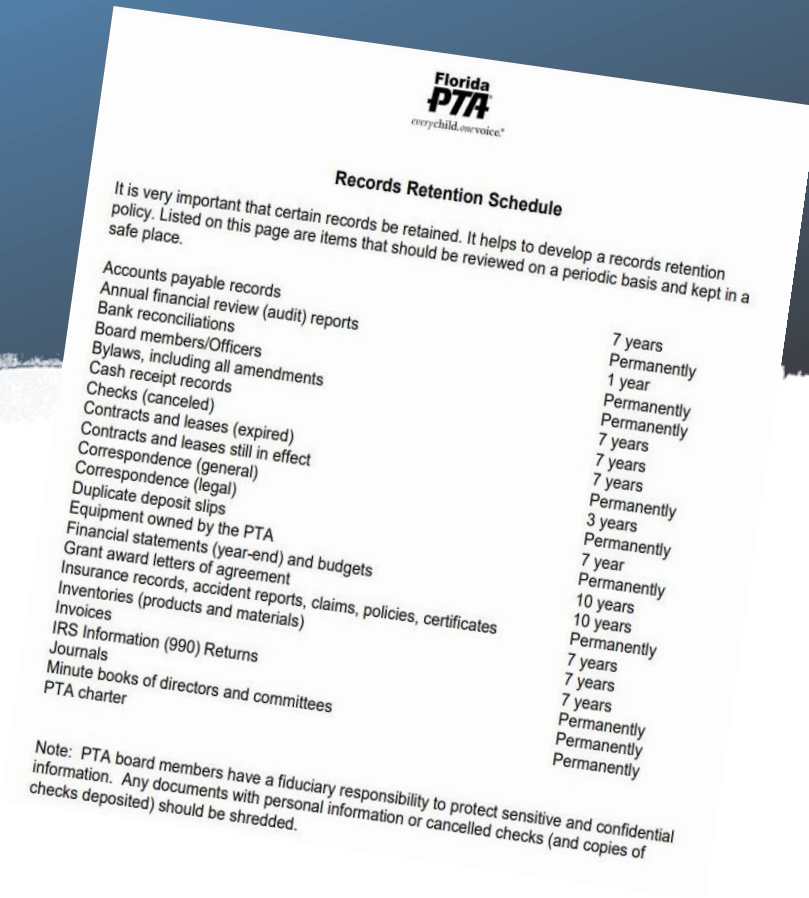
- Provide signed copies of minutes to the new signers to bring to the bank

## 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



CONTACT US

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