

Making the Transition

“It isn’t the changes that do you in, it’s the transition,” said William Bridges in his book *Managing Transitions*. The next few months will bring changes for many PTA local units as new leaders assume their duties. How can you and your board help your unit and leaders work through this transition?

Transition actually starts with an ending. In this case, one administration ends, and a new one begins. The change touches everyone:

- **Members learn to work with new leaders.**
- **New leaders get used to being in charge.**
- **Board members become acquainted with new jobs and assignments.**
- **Everyone gets used to new procedures.**

How do you manage transition with so many people involved?

Planning ahead is your best strategy. Some actions you might take include:

- **Together with the unit board members, identify what will be changing. Plan how you’ll inform the membership about these changes, including the reasons for the changes and the timeline.**
- **Plan time for each outgoing officer/chair to sit with his or her incoming counterpart. At that time, outgoing leaders should turn over pertinent materials, including procedure books, meeting reports, budget information, etc.**
- **The outgoing board should introduce the new leaders to the membership. It often smoothes the way when members know a bit about their new leaders.**

As soon as possible, provide incoming leaders with records, including

- **List of past PTA board members, addresses, phone numbers, and emails**
- **Membership figures for the last two years**
- **A complete set of newsletters for the past year**
- **Past unit correspondence**
- **A list of partners, projects, and contact people, along with their contact information**
- **Current bylaws, standing rules, policy manual**
- **Procedure book**
- **Last year’s plan of work and results**
- **Last year’s financial information**
- **Materials from the state PTA**

If you’re part of the outgoing board, be sure to celebrate your successes. Then let those who will follow have their chance to shine!