New board handoff kit

A head start for your PTO or PTA board. Take what's useful and change the rest.

Timeline

10 to 8 weeks out

- [ ] List every board role and who's stepping in
- [ ] List your accounts and who has access
  Email, website, social media, payment apps, and anything else you log in to.

6 weeks out

- [ ] Gather files in one shared place
  Bylaws, past budgets, minutes, and event notes.
- [ ] Note your tax, insurance, and renewal dates
  Who handles each one, and when it's due.

4 to 5 weeks out

- [ ] Write a short note for each role
  What the job really involves, and what you wish you'd known.
- [ ] Walk the new treasurer through the finances

2 to 3 weeks out

- [ ] List the year's events and key dates
- [ ] Introduce the new board to your principal
- [ ] Share vendor and donor contacts

The final week

- [ ] Invite the new board to a meeting

Handoff day

- [ ] Update bank signers
  Your bylaws and bank can tell you what's needed.
- [ ] Change passwords and move account access

After the handoff

- [ ] Check in with the new board
- [ ] Review the first budget together

Easy things to overlook

Accounts tied to a personal email
A shared PTO address makes the next handoff much easier.

Bank signers
Banks often need paperwork or a visit, so it can help to start early.

Tax and insurance dates
These can fall in the middle of a transition, so it helps to write them down.

What's only in someone's head
The vendor who always gives a discount is the kind of thing a short note can save.

Who to call in the fall
Knowing you're happy to answer a few questions can mean a lot to a new board.

Want it all in one place?
PineBoard can hold your tasks, volunteers, shopping, and budget together, and copies the plan to next year. Try it free for 60 days at pineboard.app.