



## Best Practices on Transitioning Your School Support Organization's Officers from Year to Year

As School Support Organizations prepare to end one school year and go into the next, organizations often have officers that are leaving their positions and new ones transitioning in. Your organization should prepare for an easy officer transition for the success of your organization and before any outgoing officers disappear.

The following information gives best practice tips on things your organization can do to effectively handle the transition of officers:

- ✓ Current officers need to review the organization's by-laws on term limits of current officers and how to properly elect or appoint new officers.
  - In MNPS, elected officers must be a parent or legal guardian of enrolled students at the associated school with the exception of Alumni Associations; must not be related to another elected officer in the same school support organization; must not be related to the bookkeeper, administrator, or any employee associated with the SSO of said school.
- ✓ Once officers have been elected or appointed per the organization's by-laws, the officers should have an executive meeting or two with all current officers and incoming officers. This allows an opportunity for the outgoing and incoming officers to discuss and share information between the two groups. Important information to discuss and share during these meetings are as follows:
  - Expectation of the position that the incoming officer will hold. (Example: The outgoing President or Treasurer can share what their role & responsibilities look like to the incoming President or Treasurer.)
  - Sharing the organization's operational documents
    - Charter
    - By-laws
    - IRS or any other tax documents
    - Copies of meeting minutes
    - Previous year's budget and registration info
    - Banking info (Account number, current balance, and copies of prior year bank statements)
    - Computer files relevant to the organization
    - Copies of past fundraiser info, any binders or templates used by the organization for newsletters, emails, flyers, etc.
    - List of members or current volunteers and their contact info
    - List of vendors and/or community partners and their contact info
    - District policies that the organization must follow
- ✓ Having a transition plan to ensure that at least two incoming officers have been added to the checking account before the outgoing officers' leave.