



# Transitioning Your PTA/PTSA

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## Agenda

- What is transition planning?
- Creating the Conditions for Successful Leadership Transition
- Steps to transition planning
- Transition Dangers
- Key takeaway
- Q & A

# Training

Training is the means of  
Acquisition of knowledge  
Training has specific  
basic training require  
training

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*A strong nonprofit leader is critical to the success of organizations, its ability to continue providing uninterrupted services to the community and for long term sustainability.*

*Nonprofit Executive Succession-Planning Toolkit, Federal Reserve Bank of Kansas City*

What is  
transition  
planning?

Any type of formal rules or procedures in  
arranging for managerial succession. .



# Creating the Conditions for Successful Leadership Transition

- Strong Leadership: board and staff
- Documented processes and procedures, association knowledge, program plans
- Current Strategic Plan
- Well-defined roles and responsibilities
- Shared knowledge and relationships
- Functioning information systems
- Knowledge of association's capacity



## Steps to transition planning

Figure out what you most need to learn, from whom, and how you can best learn it.



Develop and communicate  
a compelling vision for what the  
organization  
will become.

Outline a clear strategy for  
achieving that vision.



Identify a few vital goals and pursue them relentlessly.

Think about what you need to have accomplished by the end of year 1 in the new position.



Evaluate the team you inherited. Move deftly to make the necessary changes; find the optimal balance between bringing in outside talent and elevating high potentials within the organization.



Think through how you plan to “arrive” in the new role.  
Find ways to build personal credibility and energize the  
volunteers.



# Transition Dangers

- Loss of organizational knowledge
- Loss of leader viewed as loss of association
- Confusion about what to do and who should do it
- Poor choice of new leader
- Outgoing leaders won't let go
- - New leader doomed to fail





## Key takeaway

Communication is key  
to a successful  
transition.



# Questions & Answers



# Resources

[Preparing for Leadership Transition](#)

The First 90 Days – Michael D. Watkins

A man with dark hair and a beard, wearing a yellow sweater over a white collared shirt, is shown in a thoughtful pose with his hand on his chin and looking upwards and to the right. The image is framed by a thin black border.

Thank you!

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