

Transfer of Records

- It is the responsibility of the outgoing officers to ensure all Parent Association (PA¹) records are transferred to the newly elected officers.
 - PA records must be maintained on school premises.
 - PA records must be retained for 6 years.
- The June Transfer of Records meeting must occur no later than June 30th of each school year.
 - The incoming and outgoing officers should discuss available dates and times immediately following the election.
- The incoming and outgoing officers *and* the principal must be in attendance at the June Transfer of Records meeting.

List of PA Records to be Present and Transferred at the Meeting:

- PA bylaws
- PA Election Certification Form
- PA Employer Identification Number (EIN)
- PA bank account number(s) and all bank statements
- All financial records – notably the Interim and Annual PA Financial Reports, PA Proposed Budget, Fundraising Activity Reports, monthly treasurer’s reports, receipts and invoices, PA checkbook and ledger, and any method of financial record keeping used by the PA (i.e., spreadsheets, financial software).
- Meeting notices, agendas, minutes and attendance sheets from all general membership and executive board meetings
- All PA email addresses and passwords
- Keys/combinations for the PA’s storage location (i.e., safe, file cabinet, etc.)
- PA contact lists

Suggested Flow of the Meeting:

- All parties should sign an attendance sheet
- Meeting should be chaired by a member of the outgoing executive board.
- Welcome & Introductions
 - The transferring of records is essential for the incoming PA executive board to understand the past practices of the association.
 - A proper transfer meeting will ensure that the PA continues to function in compliance with Chancellor’s Regulation A-660, while providing support and resources to the school for the benefit and educational growth of the students.
- The meeting chair should ask each of the outgoing officers to present the records that she/he was responsible for maintaining. Incoming officers should be given an opportunity to ask questions following each presentation.
- A list of all records discussed and transferred should be created during the meeting. All meeting participants should review and sign the list (see template on page 2). The list of records must be maintained by the PA.
- In addition to the records physically transferred during the meeting, the outgoing officers should inform the incoming officers of any physical property owned by the PA (i.e. computer, printer, etc.)
- Following the exchange of records the meeting chair should encourage outgoing officers to share school protocols regarding PA operations (i.e., building access, photocopy requests, extended use permits, etc.)
- After the meeting all transferred records must be kept on school premises in the locked location designated for storage of PA records.

¹ For the purposes of this guide, the term PA refers to both Parent Associations and Parent-Teacher Associations.

Transfer of Records Meeting

Itemized List of Records Reviewed

School: _____

District: _____

Meeting Date: _____

Document all records discussed and transferred during the meeting.

Attendees:

Position	Print Name	Sign Name
Outgoing President		
Outgoing Secretary		
Outgoing Treasurer		
Incoming President		
Incoming Secretary		
Incoming Treasurer		
Principal		