

Creating and keeping a procedure book



One of the most helpful tools for a PTA volunteer is the *Procedure Book*. Maintaining a procedure book will provide helpful and useful information for each officer and/or chairman. This information can then be passed from volunteer to volunteer each year and provide an invaluable resource. If you are a new volunteer and there is no procedure book for your position, now is the time to create one. The procedure book, which can be a three ring binder, should contain a record of work done and other helpful material that has been collected. Include the following:

- A copy of the local, state, and national bylaws and the National PTA handbook.
- Standing rules.
- The annual budget.
- Approved programs for the year.
- Materials from workshops and convention.
- Job descriptions that are updated regularly for easy reference.
- Agendas, minutes, financial reports, and all other reports.
- A list of the officers and chairmen's addresses, telephone numbers, and e-mail addresses.
- A list of resource people and organizations. Include addresses, phone numbers, and email addresses.
- Special information relating to officers or chairmen including current work plans (including all fliers sent out for events).
- Program correspondence and files for at least two years so that each administration can look back on their predecessors' work as needed. *(Check legal requirements for some files which must be kept for seven years. Minutes must be kept forever.)*

Procedure books are created to help a PTA run smoothly and provide each chairman or officer with a record of what has been done in the past. Remember the procedure book, as with all PTA materials, belong to the organization. Once a chairperson or officer transitions out of a position, the procedure book should then be passed on to the next person filling the position.

