

Creating and keeping a procedure book

One of the most helpful tools for a PTA volunteer is a *Procedure Book*. Maintaining a procedure book will provide 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 not a 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 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 adopted budget
- 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 officer and chairmen addresses, telephone numbers, and e-mail addresses
- A list of resource people and organizations including addresses, phone numbers, and email addresses
- Special information relating to officers or chairmen including current work plans and all flyers 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 an officer or chairman has moved out of a position, the procedure book should then be passed on to the next person filling the position.