

Procedure Book

Don't Re-invent the Wheel—Creating and Keeping a Procedure Book in PTA

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 chairperson. 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 bylaws form, found in the Bylaws section of this Handbook given to each President.
- Standing rules. Not all PTAs have these, but they contain job descriptions and more detailed information about conducting the business and directing the activities of your PTA.
- The annual budget, especially the budget for your activity or project.
- PTA calendar for the year.
- Materials from workshops and convention.
- Job descriptions that are updated regularly for easy reference. Refer to your standing rules, the State PTA Handbook or to specific handbooks provided at the PTA Office or on the hard drive provided to PTA Convention attendees.
- Agendas, minutes, financial reports, and all other reports.
- A list of the officers, chairmen, and committee members addresses, telephone numbers, and e-mail addresses.
- A list of resource people and organizations. Include addresses, phone numbers and e-mail addresses.
- Special information relating to officers or chairmen and current work plans and including all fliers sent out for events.
- Previous program correspondence and files for at least two years so that all officers can look back on their predecessors' work as needed.
- All fliers, handouts, newsletter articles, announcements and other publicity and media tools.
- Copies of all receipts from the purchase of supplies or food for your particular project.
- A comprehensive list of supplies needed for the project and their location.
- A time line for the project, when to reserve things, order things, pick-up things, how often to hold meetings, etc.
- A data disc or thumb drive containing all of the above information that was created specifically for this project.
- Very important—an evaluation of the project. What worked and what didn't. What you wish you had done differently. Include the names of key people who helped you most or provided important and helpful information. It is always good to re-convene the committee to discuss this as a whole, to get different viewpoints.

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