



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 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 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 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.
- 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 chairpersons 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 chairs including current work plans.
- Back 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 chair person or officer has moved out of a position the procedure book should then be passed on to the next person filling the position.

Patty Jordan
4th District PTA
VP Leadership Services
(714) 281-3636
leadership@fourthdistrictpta.org

Fourth District
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