Suggested Procedure Book Contents

The procedure book, which can be a three-ring binder or an electronic file (i.e. a flash drive, etc.), should contain a record of work done and other helpful material that has been collected. Include the following:

- A title page with name of office, name of association, previous officer(s) and dates served
- A copy of the local PTA bylaws and standing rules (if your PTA has standing rules)
- A copy state and national bylaws
- Program plans for the year
- Calendar or events for the year
- Agendas, minutes, and reports
- Job descriptions that are updated regularly and filed for easy reference
- Finance Section that includes budget, financial reports and audit report.
- List of officers' and chairs' addresses, telephone numbers, and e-mail addresses
- List of volunteers' addresses, telephone numbers, and e-mail addresses
- Special information relating to offices or chairs including current work plans
- Materials from workshops or conventions
- A list of other files and resources kept by your PTA including contents and location
- Correspondence and files for the past two years so that each administration can look back on its predecessor's work as needed. Check on legal requirements for other files. For example, minutes must be kept permanently and financial records should be kept for ten years.
- A list of resource people and organizations (including phone numbers and addresses)
- A file or scrapbook of newsletters, newspaper articles, etc.
- Other information from previous years.