

PROCEDURE BOOKS

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 unit bylaws.
- ✓ 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 the PTA.
- ✓ The annual budget, especially the budget for your activity or project.
- ✓ PTA calendar for the year.
- ✓ Materials from workshops and trainings.
- ✓ Agendas, minutes, financial reports, and all other reports.
- ✓ A list of the officers, chairs, and committee members 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 and current plan of work and include 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 timeline for the project, when to reserve things, order things, pick-up things, how often to hold meetings, etc.
- ✓ A flash drive or disc containing all of the above information that was created specifically for this project.
- ✓ Very important – an evaluation of the activity. What worked and what didn't. What you wish you had done differently. The names of key people who helped you most or provided important and helpful information. It is always good to reconvene the committee to discuss this as a whole, to get different viewpoints.

What is a Procedure Book?

Procedure Books are created to help a PTA run smoothly and provide each chair or officer 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 chair or officer has moved out of a position, the procedure book should then be passed on to the next person filling the position.

Contact Information

Your District Director

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