

# SECRETARY

## PTA PROCEDURE BOOKS

### What are they?

- Collection of useful records for a specific PTA position, often kept in a binder
- Materials indicating what activities were done by a chairman or officer
- Resources showing how events and activities were organized

### Why do we need them?

- Supply a good overview of the activities involved in each board position
- Help incoming officers and chairmen get up to speed on the scope of their new position
- Provide each board member with a record of what has been accomplished in the past
- Bridge the experience gap for new officers and chairmen
- Save time and effort by new board members so they never need to reinvent the wheel
- Ensure a PTA runs smoothly by providing continuity in its activities

### Who should create one?

- Any chairman or officer moving out of a position prepares a procedure book to pass on to the next person filling the position
- New volunteers who did not receive a procedure book for their position should take the opportunity to create one

### What goes in them?

- Materials and records of the work done
- Relevant goals and plans
- Reports on activities
- Evaluations of how well events were received
- Step by step lists showing how activities were organized
- Time lines used in planning an event
- Notes with ideas on other activities to consider in the future
- Suggestions of how to streamline or tweak activities to make them even better
- Copies of invitations and programs distributed for an event
- Bylaws - unit, council, state, and national PTA
- Standing rules
- Annual budget
- Annual Calendar of Programs
- Training materials from workshops and convention
- Job descriptions of the position
- Meeting agendas, minutes and reports
- Board directory with contact information
- List of resource people and organizations along with their contact information
- Information and materials relating to current work plans
- Flyers, announcements and newsletter articles distributed for events
- Back program correspondence and files for at least 2 years

### REMEMBER:

- There are legal requirements for some of your files. Some, like financial records, must be kept for 7 years. Others, like meeting minutes, must be kept forever.
- Procedure books, as with all PTA materials, belong to the organization and should be passed on to your successor.

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