

Developing a Procedure Book

Every PTA officer and committee should have an established Procedure Book. The primary function of a Procedure Book is to provide a record of previous work, useful materials, and information relevant to a specific job. Procedure Books are passed on from one administration to the next, eliminating the need to redevelop important information and materials. A loose-leaf binder makes a serviceable and convenient cover, since materials may be removed or added as desired. The contents of a Procedure Book will vary according to the particular job. The following list of “basics” should be included in every committee’s book:

- Committee’s Job Description.
- List of committee members with addresses, phone numbers, and email addresses.
- Predecessor’s records and final report with evaluation and recommendations.
- Pertinent state and National PTA information.
- Name, address, phone number, and email address of State Board counterpart.
- Bylaws and Standing Rules.
- Copy of approved Plan of Work/Action Plan.
- Copy of approved Budget for committee.
- List of potential volunteers.
- Copies of reports to membership.
- Copies of publicity if applicable.
- Minutes of committee meetings.
- Copies of final reports, evaluations, and financial statements.
- Copies of contracts, etc.
- Materials from workshops or convention.
- Planning calendar.
- List of sources and contacts.
- Copies of relevant sections of the Oregon PTA Officers’ Manual or National PTA Annual Resources for PTAs.
- Other materials helpful to committee.

For future reference, date all materials as they are added to Procedure Books. The information in Procedure Books should be kept intact. If segments of the book are useful to other committees or individuals, those segments should be copied, not removed from the book. Procedure Books are the property of the local unit and must be returned to the Executive Committee/Board upon completion of the term of office.