

PROCEDURE BOOK

A procedure book, one of the most important tools in PTA work, is often the least used! Since the majority of the new recruits have little or no experience in the job, they need a procedure book in identifying the work and continuity of an office or chairmanship and to chart a course of action to be followed. Association background, contributions from others, successes and areas needing improvement, and an up-to-date record of activities gives a foundation on which to build and recruit volunteers.

If each officer and chairperson would compile a procedure book, the work of the association would continue in a more efficient manner.

WHAT IS A PROCEDURE BOOK?

A loose-leaf binder makes a serviceable and convenient notebook to which pages can be easily added. Since some of your most valuable materials may not fit into the notebook, an expandable file or file box may be useful. Remember that a procedure book is the property of the association and not the person who is using it during the year.

WHAT DO YOU PUT IN A PROCEDURE BOOK?

1. Name, address, telephone number, email address, and term served
2. Your plan of work and calendar (pay attention to established deadlines)
3. All information pertaining to your area, such as from State and National PTAs, Council and your unit's established guidelines
4. Directory of board members, faculty, your committee, state and council counterparts, and other contacts
5. Association bylaws and current budget
6. All correspondence pertaining to your office or chairmanship
7. Copy of any reports sent to Council, State or National PTA
8. Notes from workshops, conferences and conventions you have attended
9. Any other resource material you have found to be helpful
10. Evaluation of the year's work with specific suggestions for improvements
11. The job description pertaining to your position

In short, your procedure book should tell all about your office or chairmanship, when and how you should do your job, contacts which have been helpful to you during your term, and suggestions for the future. In addition, a diskette or CD containing flyers, letters and other documents pertinent to your position is extremely useful to pass on to your successor.

Each person is different and the procedure book is not intended to stifle any creativity. It is intended to set forth some direction to help facilitate the work of the PTA and provide for a smooth transition. Providing a format for year-end reporting may be helpful. Be sure that an extra copy is made of the year-end report to include in the President's Book.