



## Procedure Books—Preserving Your PTA’s Knowledge

Every PTA has that one person, the one who chaired an event and turned it into something more than it has ever had been before. That person had children in the school for years and they have been chairing the project for a long time. Now their youngest child is getting ready to leave your school, and you’re faced with the challenge of finding someone new to assume the project. A new person will be more willing to take on the responsibilities if there is a procedure book to guide them.

### Why Have a Procedure Book?

Since PTA leadership often changes, procedure books play two critical roles for a PTA:

- **Preserving a PTA’s Knowledge:** Volunteers may move on, but a procedure book preserves what they did, how they did it, who they contacted, what was spent, and much more. Your PTA has worked hard over the years learning how to meet its goals, how to make programs and events successful, and how to meet all of its legal responsibilities. A procedure book means all that hard work isn’t wasted by being lost when a volunteer moves on.
- **Helping to Recruit New Volunteers:** Stepping into a new PTA position, whether as an officer or a chairman, is a bit like a journey to a new land. A basic procedure book serves as a map of that new land, while a detailed procedure book can be a wonderful guidebook. A procedure book makes it easier to find someone willing to take on a PTA position, knowing that they are not setting off into that new land with nothing more than a flashlight and a hearty wave from their fellow PTA members.

### What Should Go In a Procedure Book?

A procedure book should contain all the materials needed to accomplish the work of the office or committee, plus any additional information a new volunteer would find helpful. A three-ring binder makes it easy to add and remove materials to keep the contents up-to-date. A set of tabbed dividers can help keep sections organized. The items listed below are suggestions for a procedure book, but are not necessarily complete. If you feel that a certain document would be helpful to the person following you, be sure to include it in the procedure book.

- **Contact Information**
  - Contact information for the chairperson/officer (name, address, e-mail, phone number)
  - Other relevant contacts (e.g., other officers, committee members, etc.)

# PROCEDURE BOOKS



- **Goals and Responsibilities**

- Job description for the position
- List of overall goals
- Plan of work for the year
- Budget information
- Reimbursement procedures and forms Tax-Exempt Letter

- **Event Planning**

- Materials from previous year(s), including past budget and how it was spent, previous contacts, promotional materials, etc.
- Event planning templates, including timelines, volunteer responsibilities during event,
- Correspondence related to the event (e.g., e-mails, notes of phone calls and conversations, etc.)
- Materials distributed by the committee (e.g., calls for volunteers, flyers, posters, etc.)
- Post-event committee reports, including how budget was spent, who was contacted, who volunteered to help, what went well, what went wrong, and what you would do differently the next time

- **PTA Administrative Information**

- Bylaws and Standing Rules
- Agendas and Minutes
- Financial materials (budgets, financial reports, etc.)
- Contact information for all officers and chairmen
- Calendar of events and responsibilities for each month
- Records retention schedule

At the end of the year, the PTA president should be sure to collect the procedure books from all of the officers and chairmen who are not continuing in their current position. Each committee chairman should provide a committee report for the PTA's records so at least a basic procedure book can be recreated if needed.