

PROCEDURE BOOKS

PTA leaders need guidance because of regular changes in leadership and volunteer personnel. Each officer and chairman must have a procedure book to ensure continuity and progress. The procedure book, together with all material belonging to the office or chairmanship, should be delivered promptly to one's successor.

A PROCEDURE BOOK IS NOT PERSONAL PROPERTY

A procedure book should contain all materials which will be needed to carry out the work of the office or chairmanship plus any additional information which a new volunteer would find helpful. It is recommended that the procedure book be a loose-leaf binder, large enough to hold 8-1/2" x 11" paper. The president needs an additional loose-leaf binder for the National PTA Handbook, Guidebook of the California State PTA, Guidelines notebook and additional support material.

A procedure book should include:

1. Introductory section
 - Title page with:
 - Name of office or chairmanship
 - Name of association, council (if in council) and district
 - Previous officer/chairman and dates served
 - This statement "THIS PROCEDURE BOOK BELONGS TO THE OFFICE OR CHAIRMANSHIP AND NOT THE INDIVIDUAL."
2. Job description including California State PTA worksheet page (if one exists) for specific position.
3. Bylaws and Standing Rules.
4. Agendas and minutes.
5. Finance section with:
 - Budget
 - Auditor's report
 - Financial reports
6. Program/calendar events
7. Reports
 - From current and previous officers/chairmen
 - Information from conferences, workshops and correspondence.
8. Newsletters
9. Directory *PTA*

