

Procedure books are created by PTA volunteers – officers, committee chairs, event chairs, etc. – to provide a record of the year for the volunteers’ successors. Although it is called a “book,” it may be a three-ring binder or an electronic file (i.e., CD, flash drive, etc.) containing a record of work done and other supporting materials.

Consider including the following:

- Title page with title, name of association, current volunteer holding this position, previous volunteers holding this position, contact information, and dates served
- Table of contents
- Copy of the local PTA bylaws and standing rules (if standing rules have been adopted)
- Copies of the state and national bylaws
- Program plans for the year
- Calendar of events for the year
- Agendas, minutes, and reports
- Job descriptions, which should be updated regularly and filed for easy reference
- Finance section with budget, financial reports, and financial review/audit report
- Approved Plans of Work
- List of officers' and chairs' email addresses, physical addresses, and telephone numbers
- List of additional volunteers' email addresses, physical addresses, and telephone numbers
- Materials from workshops or conventions
- List of other files and resources kept by your PTA, including contents and location
- Correspondence and communication files (Refer to records retention schedule for how long to maintain documents.)
- List of resource people and organizations (including websites, email addresses, physical addresses, telephone numbers, and description of working relationships)
- File or scrapbook of newsletters, newspaper articles, etc.
- Other information maintained from previous years