

## Procedure Book

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 chairman, should be delivered promptly to one's successor.

A procedure book should contain all materials needed to accomplish the work of the office or chairmanship, plus any additional information that a new volunteer would find helpful.

It is recommended that the procedure book contents be placed in a loose-leaf binder, large enough to hold 8-1/2" x 11" paper. The president may need additional binders to hold the *National PTA Quick - Reference Guides*, *California State PTA Tool kit*, and additional support material.

### **A procedure book should include:**

1. Title page with - Name of office or chairmanship;
  - Name of association, council (if in council) and district PTA;
  - Previous officer/chairman and dates served; and
  - This statement: "This procedure book belongs to the PTA unit and not the individual."
2. Job description including the summary included in the *California State PTA Toolkit* for the specific position (if applicable) (Recommended Officers 2.3.11, 44; Committee Development and Guidelines 2.5, 57).
3. Current bylaws and standing rules.
4. Agendas and minutes.
5. Finance section that includes budget, financial reports, and audit report.
6. Calendar of events and/or responsibilities for each month.
7. Reports from current and previous officers/chairmen. Information from conferences, workshops, and correspondence.
8. Newsletters and other unit communications.
9. Executive board roster.

**Remember: A procedure book is *not* personal property.**