

How to create a procedure book

Each officer and chairmen is asked to keep a procedure book that documents all of the activities conducted by that position. The purpose of keeping a procedure book is for accountability/record keeping, organization and training/transition for those that follow you.

How to compile a procedure book:

- Use a three-hole notebook
- Separate sections with tabbed dividers
- Include a Table of Contents like the one outlined below
 - Table of Contents for Procedure Book
 - Directory
 - Your contact information including the year you served
 - Names/contact information for BPES' current officers and chairmen
 - Contact information for Keller Council of PTAs
 - Contact Information for Area 17
 - Contact Information for Texas PTA
 - Contact Information for National PTA
 - Resources including people, related agencies, and contacts you have made pertaining to your officer/chair position.

- **Goals**
 - List of overall goal of chairmanship (see Texas PTA Handbook)
 - List of specific goals for your term of service
- **Plan of Work (approved by Executive board and general assembly)**
- **Events, projects, programs implemented**
 - List on separate pages each event, project and/or programs including dates, responsibilities, expenses and an evaluation form
- **Materials**
 - Materials received from Texas PTA
 - Notes from workshops, District and State events (Leadership Orientation handbook)
 - Correspondence
 - Materials distributed from your office such as news releases, calendar of events, flyers, etc.
- **Reports**
 - Reports, including reports given by your office (list each title separately)
 - Forms, including all forms sent by your office for awards at Council, District, State and/or National levels

- Evaluations
 - What were your successes? Why?
 - What projects failed? Why?
 - What persons, groups, materials, etc. were most helpful?
- Recommendations for future committees