

Procedure Notes

Officers and chairmen to hold those materials considered important to the work of a particular office or committee should keep Procedure Notes. Such notes, books or flash drives, passed on to succeeding officers and chairmen, are most helpful in ensuring an ongoing PTA program of work.

It can be a flash drive, a loose-leaf binder or a 3-prong pocket portfolio, whatever is convenient and serviceable to which information can be easily added. The entries made in Procedure Notes vary with the type of group and the year's activities, but materials should be limited to parent-teacher association work.

Since the majority of new chairmen have little or no experience in the job, they need some Procedure Notes to help them identify the work and continuity of a committee, and to chart a course of action to be followed. Association background, contributions from others, successes and failures – provide such a record and give a foundation on which to build.

IF YOU DIDN'T RECEIVE ANY PROCEDURE NOTES, NOW IS THE TIME TO START SOME!

What to put in it:

1. The name of your PTA along with the school address and phone number.
2. Your name, address, telephone number and year served
3. Your plan of work – see *Action Plan* <http://www.ptakit.org/Programs/Additional-Resources.aspx>
4. What you accomplished this year
5. A calendar/timeline of events (good to list activities that need to be done by each month)
6. A copy of all expenses; include where purchased, dollar amount, what it was used for, and was it adequate to do the job needed
7. A copy of any newsletter articles that you wrote for your PTA/school newsletter
8. A copy of any reports sent to Duval County Council, Florida PTA, National PTA, and to any other places
9. A copy of all correspondence pertaining to your office or chairmanship; include addresses to where you sent the correspondence
10. Notes from workshops, conferences, and conventions you have attended
11. A list of ideas that worked
12. A list of ideas that didn't work
13. Evaluation of this year's work with specific suggestions for improvement for next year

Include Information from Other Sources:

1. All information from Duval County, Florida and National PTA
2. Directory of Board Members, Faculty, Committee Members, and other Contacts
3. Association bylaws, current budget, newsletters
4. Any other resource material that you have found to be helpful

At the end of the school year, check with your PTA President about who gets your Procedure Notes next.

**whatever
works for
you**

