

President's Procedure Book

QUESTION: Why have a procedure book as a president?

ANSWER: Why not? Why not pass along all the things you have learned on to the next person so they don't have to struggle to relearn the things a president should know.

The goal of a President's Procedure Book is to provide an overview of your PTA's specific events and traditions. A new president should be able to scan through this book and have a good foundation of how your PTA works.

What you need:

- 3 inch HEAVY duty Binder with the View finder front
- Section dividers with pockets – 20 total (walmart has a generic set 5 pack for \$1.50)
- 3 hole punch and Pen to write on labels

Tab 1: Your School

- Bylaws and Standing Rules
- Yearly Goals
- LU's Leadership And Committee Descriptions

Tab 2: Calendar

- Your School/PTA Calendar
- Your District's Calendar
- Council, Region and State Calendar and Deadlines

Tab 3: Board and Membership Lists

Tab 4: Financial

- Bank Records – signature cards, etc.
- Monthly Treasurer Reports
- AFRs and Year End Financial Statement
- Approved Budget

Tab 5: Agendas and Minutes

Tab 6: Legal (Insurance and IRS)

- Annual Insurance Certificate
- IRS Determination Letter
- Tax Exemption Certificate
- Outside Vendor Contracts

Tab 7: Reports

- Local Reports that are turned into Region/Council
- Volunteer Hours Report

Tab 8: Why PTA?

- Why PTA?, Utah PTA President's Handbook - General Section
- Value of PTA, Utah PTA President's Handbook - General Section
- Nationals Standards, Utah PTA President's Handbook - General Section
- Procedure Book, Utah PTA President's - President's Tools Section
- Leadership Development, Utah PTA President's - President's Tools Section
- Line of Communication, Utah PTA President's - President's Tools Section
- Local Bylaws, The Red Stamped Copied that is approved
- Why Count Volunteer Hours, Utah PTA President's - President's Tools Section
- Responsibilities of PTA Leaders, Utah PTA President's - President's Tools Section
- Financial FAQ, Utah PTA President's Handbook – Financial Section

Tab 9: Survey Results

- Needs Assessment Results
- Teacher and Volunteer Survey Results

Tab 10: Executive Committees

- Committees and Events that the executive committee oversees
- Summaries and Timelines for these events are kept here

Tabs 11-15: Commissions

- These tabs are names of your PTA's commissions
- Under each commission you will keep the timeline and summary for each committee. You can also keep ideas for future events

Tab 16: Fundraiser

Tab 17: Region Directory

Tab 18: Council - Agendas and Training Materials

Tab 19: Region - Agendas and Training Materials

Tab 20: Extra

I make an exact copy of this notebook for the President elect. When I add to it, I make a copy for his/her notebook. Each of my VPs and Commissioners have a similar notebook, except I only give them the sections for the committees that under them. Why give VPs and Commissioners Procedure Notebooks???? This is where your future leadership will come from. Giving them this info makes them better prepared! I also have them bring their notebooks to meetings and use items in the notebook as training.