

Keeping a Position Notebook or Electronic File

Even someone with an infallible memory or one who organizes duties efficiently by making lists will need to keep a file of information and documents. A file keeps records at fingertips, and it will be an invaluable aid to a successor.

At the end of a term of office, personal notes and any records more than three years old (that do not hold historical value or continued benefit to understanding and functioning in a particular board position) should be discarded.

Officers:

The President and Administrative Coordinator keep almost identical files, although they may agree on certain items to be kept by one person when duplicates are not needed. A copy of each board member's End-of-Term AAR should be kept for permanent record for that PWOC year.

Electronic Files are preferred, so long as regular updates and back-ups are made, and information is not lost. Hardcopies of important documents are necessary to ensure preservation.

Items to include in a Position Notebook:

- Board Reports
- Meeting Notes/Minutes
- After Action Reports
- Women's Ministry Manual
- Local PWOC Constitution (if applicable)
- History of the Local PWOC
- Parish Council Reports (if applicable)
- Budget and Fund Requests
- Directories
- Newsletters
- Programs
- Ministry Team Reports