

# CHECKLIST FOR A HEALTHY PTA UNIT

## Membership Enrollment

- Is an initial membership campaign held toward the beginning of the school year?
- Are continuing opportunities provided for parents and staff to join? (Membership is year-round.)
- Is membership per capita sent through channels at least monthly and by deadlines?

## Minutes

- Is an attendance record kept for all meetings?
- Are minutes kept for all meetings?
- Are all action items recorded, including approval of budget, all expenses and all fundraising activities?

## Bylaws

- Are bylaws reviewed yearly and updated (sent through channels for approval) every two years?

## Financial Procedures

- Are financial procedures in accordance with recommended PTA policies and procedures?
- Is the budget approved and actual revenues and expenditures compared at least quarterly?
- Is the insurance premium and the workers comp form/remittance sent in by deadline?
- Are all checks signed by two authorized officers? And are all expenditures properly authorized?

## Treasurer's Reports

- Are written reports presented/filed monthly? Are balances, receipts and disbursements recorded in the minutes each month?
- Is each check approved/ratified and listed?
- Are reports presented at both executive board and association meetings?

## Audits

- Are audits prepared and adopted in accordance with the bylaws and PTA financial procedures?
- Are audits conducted at least twice a year? And whenever there is a change in check signers?

## Annual Reports

- Are volunteer hours being recorded?
- Are annual reports filed by the deadline?

## Leadership

- Do members of the executive board work well together?
- Does the PTA attract and retain new leadership?
- Are new, qualified candidates nominated for office each year?
- Do leaders attend council/district PTA meetings and take advantage of training opportunities?
- Do leaders communicate effectively with members?

## HOW HEALTHY IS YOUR PTA?