

Leadership Services Commission

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?

- 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?

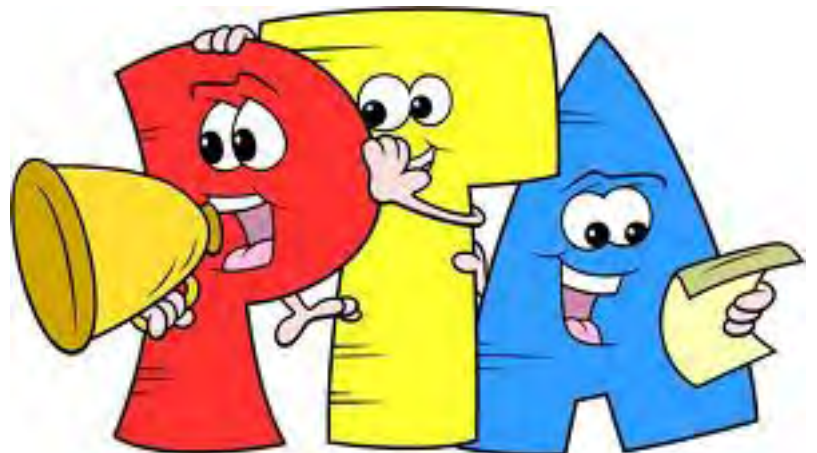
Bylaws

- Are bylaws reviewed yearly and updated (sent through channels for approval) every three 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?
 - Are tax filings submitted in a timely manner?

 - 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 they presented at both



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Annual Reports

- Are volunteer hours being recorded?
- Are annual historian 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?

