

PTA health check

A diagnostic tool to help Parent Teacher Associations grow. Provided in association with Paul Kaerger Management Solutions



Parent Teacher Associations play a vital role in creating a happy and vibrant school community. It is not just about fundraising, it's about representing the whole school community, providing a voice for those who find it hard to talk to the school and offering an extra pair of hands, where necessary.

Most PTAs are registered charities and therefore require organising and managing. The more organised a PTA, the more effective it is, so understanding how well the PTA is running is essential for PTA chairs and committee members.

This health check provides a list of questions PTA chairs and other committee members should ask of their organisation from time to time. The questions are designed as prompts, a nudge to make you step back and think about your organisation as a whole and to make sure every single element is functioning correctly.

Spend an hour going through the questions with others, answering them as openly and honestly as you can. If you don't know the answers, it might indicate there are parts of your organisation you need to find out more about.

About you

Let's start with a few general questions about your organisation.

Your name	
Organisation name	
Your role	
Income in last financial year	£
Forecast income for next financial year	£
What does your PTA do well and what makes you proud?	
What things do you think your PTA could do better?	
What things concern you about the future of your organisation?	

Organisation strategy

A successful organisation is one that can articulate its direction and communicate it effectively with colleagues, parents, the school and the wider community.

When did you last check your constitution? Does it clearly set out your objectives?
Who was involved in setting the objectives? How well do parents, school staff and pupils understand your objectives?
How do you communicate your objectives, your values and your successes to your organisation and wider community?
How do you track performance against your objectives and how well do you meet your objectives?
How do you learn from the past? What things have you changed based on lessons learnt?

Who do you turn to for advice and support? How well does that support and advice help you?

What is your outlook for the future? Where do you see the biggest threats to your organisation? What other opportunities do you foresee for your organisation in the next couple of years?

Organisational governance

Having a strong committee who share the load and are willing to generate ideas and energy is vital to any PTA.

Are the roles for chair, secretary and treasurer filled? Do you have deputies in place or have you identified people to take over?

What other roles do you have? Do people have clear role descriptions? Does everyone know their own and other people's roles?

What skills does the committee have and are there any skills gaps? Do you understand the strengths and weaknesses of your committee?

Is your committee representative of your community? Does it reflect the school in terms of year groups, background, ethnicity? How can you reach out to include others?

How frequently do you meet and what reporting is provided? Does it meet the expectations of your supporters? Is committee reporting accurate and timely?

Are meetings planned and well-organised? Do they run to time? Are agendas clear and do they allow sufficient time to complete the meeting?

What management systems do you have in place? Are these checked and audited?

What legislation are you required to comply with? How do you monitor compliance? How well do you comply?

Finances

Understanding your financial health is vital for any organisation, but it is amazing how often organisations fail to keep a clear track of their income and expenditure.

How successfully do you forecast income and expenditure? How closely do you track actual income and spend against budgets?

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How up to date is your bookkeeping? Is everyone clear on the financial position? Is financial reporting clear and accurate?

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How do you generate money? Are those methods still going to work in the socially distant future? What other approaches can you try?

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Do you need to register with the Charity Commission? Do you submit tax returns and Charity Commission returns on time?

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Do you have strong audit trails in place to track money through your financial systems? Does this support cash and contactless payments?

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People

PTAs are voluntary organisations, so creating a happy and inclusive environment will encourage people to contribute more.

Do you track who gets involved? How much time do they donate?
What do you do to thank people and recognise their efforts?
Do volunteers stay a long time or do you have a high turnover? Do you know why people volunteer and what they get out of it?
What do you do to seek out new volunteers? Are there any groups you have not managed to include yet? How can you reach out to those groups and make them feel welcome?
Do you have succession plans in place for key people, such as event organisers?

Partners

PTAs will work with other groups in order to do their work. Developing good working relationships with those other groups will make your life a lot easier.

Who do you work with? Lions? Scout groups? Local businesses?
How strong are those relationships? What areas cause you discomfort? What can you do to improve them?
How is the relationship with the school? What can be done to create a stronger bond?

Next steps

This questionnaire is designed to get you thinking. In many ways, there are no right or wrong answers, the purpose is to make you ask yourself questions where sometimes you have been too busy to reflect.

Talk to other people, get their opinion too. Use this questionnaire as the base for a conversation to get to know others better.

You may find this health check will generate a lot of questions and actions. Create an action plan where you split the actions as follows:

- short term (next 2 months)
- medium term (3-6 months) or
- long term (in a year's time).

Finally, make sure you add an agenda item to meetings to check on progress.

Good luck, and I hope this helps.

Paul Kaerger

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