

PUSDF 2013 Fall Summit
General Session Self Evaluation

Please take a moment to answer the following questions. The answers will NOT be shared, unless you would like to share them.

General

- 1) Which of the documents requested are you missing? And for those you might be missing, do you need assistance with samples?

Bylaws

- 1) When is the last time you reviewed or updated your bylaws? _____
- 2) Are you confident that 100% of your Board has reviewed and understands what is in your bylaws? _____
- 3) Do the goals and objectives in your bylaws match what you are currently doing? _____
- 4) Are you complying with your bylaws regarding minimum and maximum # of Board members? _____
- 5) Do you have Board member term limits in your bylaws? _____

Board Manual

- 1) Do you have a Board Manual? _____
- 2) In your Board Manual, do you have a provision for removal of Board members for non-participation or non-attendance? _____
- 3) Does your Board Manual contain a provision for financial commitment of Board members? _____

Conflict of Interest Policy

- 1) Do you have a conflict of interest policy? _____
- 2) Do you renew the conflict of interest policy every year (even for returning members)? _____

Data Recording Procedures

- 1) Do you currently have a written procedure for how funds should be recorded? _____

- 2) How many people have access to your data? _____ What position do they hold? _____

- 3) Do you have a written procedure for gift acknowledgment to donors? _____

- 4) Do you have a written procedure for the types of gifts you will accept? _____

- 5) What is your greatest challenge with data recording or access to data?

- 6) How can the PUSD Foundation assist you with your greatest challenge?

990's

- 1) Have you filed a 990 for the last fiscal year? _____

- 2) How many years of financial data do you have access to? _____

- 3) Do you use a CPA to file your 990? _____

- 4) What is your greatest challenge with regard to 990's?

5) How can the PUSD Foundation best support you with your challenge(s)?

6) Do you know the address and name you currently have on file with the IRS for notifications? _____

EOY Financial Report

- 1) Do you present your Board an EOY financial report? _____ Do you include the principal? _____
- 2) How is your report presented?
Excel spreadsheet? _____
Quickbooks report? _____
Other? _____ (please state what)

Budget

- 1) When do you set your budget? _____
- 2) Is the principal included in those discussions? _____
- 3) How do you provide funds to the school?
 - a. One lump sum with instructions as to how to spend? _____
 - b. Separate checks as needs arise? _____
 - c. Other? _____

If you would like to provide this information to the PUSD Foundation and/or you need assistance in any of the areas mentioned, please fill out the information below:

Name: _____

Phone #: _____

School: _____