

Tips for Chapter Officers



Audits Made Easy

The word “audit” often causes anxiety. While conducting a chapter audit may seem intimidating, there’s no reason to fear. The process can be fairly simple if you use this helpful information.

1 WHAT IS A CHAPTER AUDIT? An audit is a thorough review of all chapter financial activity in a fiscal year. In conducting an audit, an independent person or committee reviews receipts, records of disbursements, bank balance statements, and all other pertinent financial records to verify that all funds were handled appropriately.

2 WHO PERFORMS THE AUDIT? We don’t expect you to hire a CPA or financial professional to check your books. It’s perfectly fine to select one—or several—members of your chapter to conduct the audit. Of course, you’ll want to choose members wisely to avoid any perception of collusion.

3 HOW IS THE AUDIT PERFORMED? Ideally, chapter members and officers will be diligent about saving receipts, disbursement records, and other records throughout the fiscal year and submitting these items to the treasurer. Once each year—preferably in the fall, just after the fiscal year has ended—the individual or committee responsible for the audit will review all records to verify that all transactions were legitimate and recorded appropriately. The member(s) should then report their findings to the chapter membership in written form. [A sample audit report](#) is available at the PDK website if you wish to use it for this purpose. The findings should also be presented at a chapter meeting so they can be recorded in the minutes. Finally, the findings should accompany the [Chapter Activity Report](#) when it is submitted at the end of the fiscal year.

4 WHY SHOULD MY CHAPTER CONDUCT AN AUDIT? PDK chapters must be held accountable to their membership in order to maintain their professional integrity. In the same way that PDK International conducts a yearly audit to remain accountable to its chapters, chapters can instill and cultivate confidence among their members by demonstrating their financial responsibility.

5 WHO SHOULD I CONTACT WITH QUESTIONS? The PDK International member services team is available to answer your questions. Call 800-766-1156 or email memberservices@pdkintl.org.

Thank you for your leadership. We wish you continued success in your chapter!

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