



PARENT TEACHERS ASSOCIATION

Notes Applicable to the Application for a Committee / Officer Position

Committee roles and responsibilities

Key facts on the roles and responsibilities of PTA committee

Committee structure

The key elements of the structure of the association are the:

- constitution (governing document)
- members
- committee
- trustees

Constitution

All associations need a **constitution**. This is a document which establishes the fundamental rules by which the association is governed and describes:

- the aims of the association and its powers
- its membership
- the size of the committee and how members are elected
- the need for an annual audit and general meeting

Members

The type of association your school has or wishes to establish will depend on its membership:

1. in a Parents' Association (PA) members are limited to parents, carers and guardians of pupils currently at the school
2. in a Parent Teacher Association (PTA) or Home School Association (HSA) members are limited to the above plus the teaching and non-teaching staff currently employed by the school

It is important that the definition of membership is clear in your constitution. Members are not legally responsible for the actions of the association. It is the elected committee members who are legally responsible for the management of the association.

Committee

A committee is a team of volunteers who are elected at the association's **Annual General Meeting** (AGM) to manage the association on behalf of the members. There are two types of committee member, Officer and Ordinary (or Other) member. Officers have specific roles such as **Chair**, **Treasurer** or **Secretary**. Ordinary Committee Members play a vital role working alongside and supporting the Officers.

All committee members have equal voting rights, with the exception of the Chair, who has an additional casting vote, should this be needed.

It is normal for the size of the committee to vary, depending on the size of the school. The minimum number with which it is possible to operate is two; usually a Chair and a Treasurer. There is no restriction on the maximum number of committee members. However, it is in the association's interest not to make a committee too large, as this may prove to be unmanageable.



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Additional support

In addition to the elected committee, it is valuable to have a list of volunteers/helpers, who are willing to support the work of the committee. It would be acceptable for such volunteers to attend **committee meetings** but they would not have a vote; only elected committee members (Ordinary and Officers) can vote. Being a nominated PTA volunteer can be a gentle introduction to the committee and such volunteers may well go on to being a fully elected committee member with full voting rights.

Trustees

If your association is a registered charity all the elected committee members (Officers and Ordinary) automatically become Trustees of the association (charity) and have a legal duty to ensure that the association (charity) acts lawfully and is managed properly.

Whilst Trustees have a legal duty it is important to remember that all decisions should be made collectively by the committee. No one individual should take sole responsibility for a committee decision or activity.

Committee roles - chair

An introduction for new chairs.

This Information sheet should be read in conjunction with **Committee Roles and Responsibilities**.

The Chair provides leadership for the committee, sets the agenda for **meetings** and manages meetings in line with the agenda.

The Chair should ensure that issues are properly debated and an agreement is reached. Some committee members will be better at expressing themselves than others; it is important that the chair welcomes contributions from all members of the committee so that everyone feels involved. New members of the committee may feel nervous at first. The Chair should welcome all new members, introduce them to the other members and encourage them to play an active part in the discussions.

Occasionally, disagreements arise. The Chair should remain impartial, call the meeting to order without upsetting the parties involved, and make sure that the committee's decisions are not hindered in any way.

The Chair needs to work closely with the **Treasurer** and **Secretary** to ensure that the association is run effectively. The Chair can be a signatory for the association's bank account, along with either the Treasurer or Secretary or other elected committee member.

Key responsibilities:

- provide leadership; ensure the Committee fulfils its role in respect of governance of the association
- sign the approved minutes of the last meeting
- set the agenda for meetings, liaising with the Secretary
- agree a date for the next meeting
- ensure the agenda is followed and that all business is covered
- close the meeting
- call the meeting to order when it is time
- write the annual report, liaising with the Secretary
- welcome and involve new members
- sign cheques for the PTA with one other elected committee member
- ask for apologies for absence
- get to know committee members



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Committee roles - treasurer

This Information sheet should be read in conjunction with [Committee Roles and Responsibilities](#).

A key responsibility for all committee members is to manage and control the funds the association raises. Although all the committee members have equal responsibility for the control and [management of funds](#) the Treasurer plays an important part in helping the committee carry out these duties properly.

The [Treasurer](#) should maintain a record of all [income and expenditure](#). This can be done in a simple accounts book or using a computer based package. The Treasurer is responsible for handling the money raised at events, making approved payments and making arrangements for counting of money at events,

The Treasurer should report on the current financial position at each committee meeting and this should be recorded in the minutes. The report should include an update on any income and expenditure since the last meeting and the current balance. If the Treasurer is unable to attend a committee meeting, a written report should be sent to the Chair in advance of the meeting. All financial decisions taken should be recorded in the minutes of the meeting.

The Treasurer operates the bank account, reconciles the bank statements and liaises with the bank regarding changes to the bank mandate and list of authorised signatories. The Treasurer should retain the cheque book and arrange for all payments to be authorised by a second signatory ensuring regular payments, for example, NCPTA membership, are made on time to guarantee benefits and take advantage of any discounts. The person co-signing must see what is being paid for before signing and once processed the original invoices should be kept by the Treasurer.

At each event, two people, the Treasurer and another committee member should take charge of monies received and count the proceeds before they leave the event venue. Once both parties agree the total, it should be recorded and then banked or placed in a safe overnight. We recommend that funds raised should not be kept at home. The NCPTA insurance provides cover for cash to specified limits.

The Treasurer should also be involved in pursuing [charitable status](#) and [Gift Aid](#). Before the [AGM](#), the Accounts will have to be drawn up in collaboration with the Chair and either audited or independently examined as specified in your constitution.

Key responsibilities:

- maintain accurate and detailed financial records
- prepare and co-sign cheques as required
- present a financial report at each meeting
- provide and account for cash floats at events
- liaise with the bank
- charity registration and Gift Aid
- make approved payments
- pay agreed expenses
- consults with the bank or building society regarding the availability of higher rate interest accounts
- prepare annual accounts and liaise with the independent examiner of accounts
- count and bank monies
- ensure the committee has agreed appropriate procedures for the handling of financial matters



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Committee roles - secretary

This Information sheet should be read in conjunction with [Committee Roles and Responsibilities](#).

The Secretary is responsible for ensuring that there are effective communication links between committee members and between the association and the school. The Secretary deals with all the correspondence that the association receives and helps the [Chair](#) ensure that [committee meetings](#) run smoothly. Building up a good relationship with the school Secretary will help ensure that correspondence, sent to the school, is passed onto your association promptly. With the agreement of the Headteacher, the Secretary can usually arrange to leave PTA notices with the school Secretary for distribution with school mailings to parents or for distribution via 'pupil mail'.

As well as dealing with correspondence, following a committee meeting, the Secretary will need to make bookings and other arrangements for forthcoming events. Confirm arrangements made by telephone in writing (by letter or e-mail). The Secretary will make arrangements for the [Annual General Meeting](#) (AGM) and help the Chair prepare the annual report. The Secretary may also co-sign cheques on behalf of the association, along with the [Treasurer](#), Chair or other elected committee member.

Key responsibilities:

- deal with correspondence
- write up the minutes of meetings
- prepare agendas
- call meetings - giving plenty of notice
- distribute minutes to all the committee
- make meeting & event arrangements
- keep a record of attendance at meetings
- take notes during meetings
- ensure that enough committee members are present to make the meeting quorate (this number is defined in the constitution)
- co-sign cheques as required
- write the annual report with the Chair

Criminal Records Bureau checks and ISA registration (England and Wales)

Interim advice valid until July 2010

The aim of this advice is to provide PTA committee members with a quick guide to both CRB checks and ISA registration in the run-up to the launch of registration with the [Independent Safeguarding Authority](#) in July 2010.

In brief

The requirement for CRB checks remains. However, how this is applied may be affected by the new *frequent and intensive contact with children test*. It is unlikely that PTA committee members and other PTA volunteers will meet the frequent and intensive contact with children test that would make it a requirement for them to be ISA registered. However, it is still possible for your association to request committee members and other PTA volunteers register with ISA if your association decides it is necessary.

CRB checks

This is the process by which the [Criminal Records Bureau](#) undertakes checks against criminal, police and other records for information on prior convictions and possibly other intelligence to prevent unsuitable or dangerous people from coming into contact with children or vulnerable adults.



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ISA registration

This is a new scheme which establishes a list of people who are registered to work (paid or unpaid) with children or vulnerable adults and prohibits those that are barred from working with children or vulnerable adults from taking up such roles. Everyone that has been registered will then be subject to ongoing monitoring and their employer notified if they commit any offence which will bar them from continuing to work with children and vulnerable adults.

CRB checks will continue after ISA registration is launched

This is because ISA registration will only establish where an individual has been barred and will not share with employers information which may be relevant to employment but which may not be sufficient to bar an individual from working with children or vulnerable adults.

ISA launch

From 26 July 2010, all new entrants to roles working or volunteering with vulnerable groups and those switching jobs within these sectors will be able to register. The legal requirement for these employees and volunteers to register and for employers to check their status will come into force in November 2010. It appears that this timing will be consistent across England and Wales (separate information is to be provided for members in Northern Ireland). ISA will have a phased implementation with further deadlines for registration and checking between July 2010 and July 2015.

PTAs and CRB checks

- **PTA committee members:** are the trustees of the charity. PTAs are regarded as children's charities by the Charity Commission for England and Wales because they typically have some role in caring for, training, supervising or being in sole charge of children. They are therefore engaged in regulated activity. PTAs are allowed and according to the Charity Commission should obtain CRB Disclosures for their trustees
- **Other PTA volunteers:** your committee must also consider the need for CRB checks for other PTA volunteers who help with PTA activities but are not members of the PTA committee. The Department for Children, Schools and Families (DCSF) has issued guidance to schools, which remains current and applies to all of those who work or volunteer within schools, both State and Independent: Safeguarding Children and Safer Recruitment in Education. This contains a section dedicated to the treatment of volunteers and recommends the need to consider the duration, frequency and nature of contact with children. The Charity Commission also recommends that anyone in a regulated position should be checked. This includes those caring for, training, supervising or being in sole charge of children.

However, the need for other volunteers to be checked is starting to be influenced by new guidance issued to support the launch of ISA registration. This provides a definition of *frequent contact* as being work with children which takes place once a week or more. The *intensive contact test* would be met if the work takes place on four days in a month or more or overnight. It is therefore increasingly being regarded that the requirement to check parent volunteers only exists where this *frequency and / or intensive contact with children test* is met. However, this should not prevent the PTA from requesting checks on other volunteers where they have assessed that there is a risk and / or in anticipation of contact with children increasing. NCPTA recommends consulting with your headteacher to determine whether CRB checks are required for other PTA volunteers.

The Criminal Records Bureau provides information on the portability of CRB checks, (whether these can be used for more than one role). The DCSF advises that a new check is needed for anyone taking up a new role within a different school, if there is a break in their involvement of three months or more, they move to a role with significantly greater responsibility for children, or if there is concern about their suitability to work with children. The Charity Commission recommends that charities should periodically obtain new checks and that every three years is normally appropriate.



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PTAs and ISA registration

Trustees of children's charities and those that train, care, or supervise children are regarded as taking part in regulated activity. However, there is only a requirement for ISA registration where contact with children happens *frequently or intensively*: takes place once a week or more or on four days in a month or more or overnight. Again, this would not prevent your PTA from seeking to register either committee members or other volunteers where a risk assessment has been undertaken and registration is deemed necessary.

Allowing someone to work in regulated activity while knowing that they are barred

From 12 October 2009, it became an offence to knowingly employ someone who is barred into regulated activity. It isn't an offence to employ someone who is barred into regulated activity where this isn't known. Therefore, if a PTA committee member or other volunteer is barred but you haven't checked that they are registered because their contact with children doesn't meet the *frequency or intense contact with children test* this is not an offence.

Duty to refer

Also from the 12 October 2009, if your association removes someone from a regulated activity or controlled activity, or if they leave while under investigation for allegedly causing harm or posing a risk of harm, your association is legally obliged to refer this information to the Independent Safeguarding Authority. Failure to do so is an offence and carries a penalty.