Clayton St John CofE Primary School
Bradford Road, Clayton, Bradford, BD14 6DD
Telephone: 01274 815862 Fax: 01274 884856
Email: office@claytonce.bdat-academies.org Website: www.claytonce.co.uk

Headteacher: Mrs G Emsley Deputy Headteacher: Mrs L Allingham

PTFA Chairperson Job Role

The Chairperson's role is to direct committee meetings, make sure everyone is involved and their views are heard. The Chair should ensure all committee members are familiar with the constitution and their role responsibilities. They also hold the casting vote if the outcome is tied.

Responsibilities

- Preparing and setting the agenda for meetings (with the PTFA Secretary)
- Invites committee members, parents, and staff to PTA committee meetings
- Identifies outstanding items from the last meeting
- Prepares introductions for any new committee members attending
- Setting the ground rules for – as well as chairing – meetings
- Delegate tasks to other committee members and volunteers, checking they're completed and offering support where needed
- Liaises with the school, and requests a'wish list' for the PTA committee to use when deciding which projects to fund
- Ensures the committee fulfils its role in respect of the governance of the association as set out in its constitution – for example, holding an AGM, electing committee members, working with the Treasurer to ensure annual returns are completed if the PTA is registered as a charity
- Ensures any decisions made are clear, fit the objectives of the association, and are made by agreement of the committee as per your PTA's constitution
- Writing the Chair's report for the AGM
- Manage any internal PTFA disputes.
- Time to time the Chairperson may be called upon to represent the PTFA and sometimes be its spokesperson at, for example functions or meetings.
- To co-ordinate the committee to ensure that appropriate policies and procedures are in place for the effective management of the PTFA.
- The Chair may also be a signatory on the PTFA bank account
- Makes sure the association is GDPR-compliant.

Key skills

- Confident and assertive – able to control meetings and call them to order when necessary, making sure everyone has an opportunity to speak

- Able to remain impartial – ensures contributions are brief and that everyone's views are respected
- Calm, friendly and approachable – as the main point of contact for the PTFA for all members, the PTA Chair must be inclusive, and make sure everyone feels welcome
- Organised and able to delegate – most PTFAs organise a lot of activities. The PTFA Chair should make sure the workload is shared and that tasks are completed as agreed

PTFA Secretary Job Role

The PTFA Secretary has many responsibilities within the club and this role can be an all-encompassing role within the committee. The list below is not exhaustive but can give a good example of the areas that the Secretary can be involved in….

Record Keeping

- Maintain all PTFA Member records e.g. who would like to be involved in what activities, availability etc
- Maintain all club paperwork - job specs, archived minutes, method to transfer to new committee members (like transferring bank access), attendance registers, accident report book, keyholder list etc.
- Ensure that all defined roles are either filled or discontinued.
- Act as a point of contact for any members who have queries, complaints, or suggestions.
- Ensure GDPR Compliant
- Updates trustee details with relevant charity commission (as appropriate)
- May be a signatory on the PTA bank account (along with at least one other committee member)

Meetings

- Manage the flow of information to the PTFA committee and wider members.
- Act as the official contact for the PTFA in dealings with organisations and individuals inside and outside PTFA.
- Receive and respond to correspondence sent to the PTFA.
- Prepare PTFA meetings (with PTFA Chair) and record/write up minutes of Committee Meetings, and distribute copies to appropriate parties in a timely manner.
- Prepare and present the Secretary's annual report to the PTFA AGM.
- Collate the various annual Officer Reports to the PTFA AGM.
- Produce an agenda of each Committee Meeting and distribute to club members.
- Ensure that any PTFA meeting is quorate.
- Ensure that any vote at a PTFA or Committee meeting is voted on only by persons entitled to vote.

PTFA Promotion

- Handle any PTFA promotion to encourage new members and to promote to new starter parents
- Handle any contacts from the media.
- Publicise any good news to local media.

Key skills

- Organised and efficient – keeps accurate records in a format that can easily be handed over to a successor
- Good listener – able to identify key discussion points, actions, and agreements at meetings to accurately record in minutes
- Calm, friendly, and approachable – able to communicate confidently with the school and the committee members

PTFA Treasurer Job Role

As a top line specification, I feel that the Club Treasurer needs to be responsible essentially for all financial aspects of the PTFA.

This can be covered by the following points…

- Keeping accurate and up-to-date financial records
- Presenting financial updates at each committee meeting
- Managing the PTFA bank account detail and holding the associated cheque/debit card - how to change bank details, signatories, transfer of access to new Exec Committee Members
- Full online access to bank with three signatories and monitoring and managing the online payment platforms
- Preparing floats
- Ensuring best practice procedures are followed for counting and banking money, making payments and claiming expenses for all committee members
- Making any approved payments on the committees behalf
- Expectation to keep detailed financial records covering all purchases, expenses, and income
- Preparing the annual Treasure's report for the AGM and arranging an independent examination of the association's accounts
- Requirement to present accounts at AGMs and any other meeting relevant to the financial state of the PTFA (Notice must be given to prepare any financial details outside of the AGM).

- Completing the relevant Charity Commission's annual return (if registered as a charity)
- Continue to investigate new ways to increase income into the PTFA and maintain current income streams (easyfundraising, Gift Aid, annual fundraising activities etc.)
- Hold an inventory of PTFA equipment
- Report immediately on any major changes to the PTFA Bank Account

The Treasurer should also look to help guide the PTFA in all ways to make it a better PTFA and support all the PTFA Members

Key skills

- Basic understanding of bookkeeping – able to maintain accurate records of income and expenditure
- Organised with an eye for detail – big events involve counting a lot of small change. The Treasurer leads the'money' team, making up floats, and collecting money from various stalls
- Calm, approachable, and a team player – able to remain calm during busy times. Ensure they don't work in isolation by communicating regularly with the rest of the committee.