

## MISSION STATEMENT, VALUES AND CONDUCT

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### Mission Statement

*Working together for the benefit of our children.*

### Values

We will:

- *have high expectations of our PTA community and what we can achieve*
- *aim to make meaningful changes to benefit the school community*
- *be inclusive and reflective of our community*
- *strive to be transparent and open*
- *follow the same professional expectations as paid staff*
- *not expect or seek preferential treatment or financial, material benefit from PTA membership*

### Aims and Objectives

- 1. We will have high expectations of our PTA community and what we can achieve, by**
  - expecting that all volunteers want the best for ALL Rivington Foundation Primary pupils, not just their own family members or friends
  - making no assumptions about parents, families, staff or children
  - modelling Rivington Foundation Primary PTA on the best examples we can find
  - setting high, but realistic goals
  - promoting a 'can do' attitude and be a positive example of the best of our community
  - making volunteering a fun way to contribute more to our school
  
- 2. We will aim to make meaningful changes to benefit the school community, by**
  - keeping the children at the heart of everything we do
  - seeking opinion from the PTA and school community as to the best use of assets, at beginning of each academic year
  - encouraging parents to contact us regularly and attend our meetings to bring forward new suggestions and opinions of spending proposals
  - ensuring the maximum amount of money is spent directly for benefit of children
  - seeking advice from Rivington professionals and the community before agreeing large spending (items over £2000)
  
- 3. We will be inclusive and reflective of our community and school aims, by**
  - reviewing membership, considering inclusivity, planning recruitment drives/ new parent meetings accordingly and seeking new recruits at every opportunity
  - striving to hold meetings that are as accessible as possible, considering venue, time, length and notice of meeting
  - issuing an annual questionnaire, and welcoming and logging feedback
  - understanding that other people may have assets that we do not, and to seek these out to the benefit of our community
  - developing and promoting a spirit of teamwork
  - reviewing our work regularly to take account of school aims and parent feedback

#### **4. We will strive to be transparent and open by**

- widely advertising the AGM and all ordinary meetings, circulating agendas, circulating minutes via email
- publicising the names and photographs and contact details of all elected members on the PTA webpage
- following the agreed codes for handling donations, cash and spending proposals
- by providing PTA documents and minutes on request to whoever may ask to see them
- ensuring voting is clear, understood and that results are transparent
- publishing accounts annually and keeping record of all large donations received through the year
- publishing activity regularly, perhaps in form of newsletter

#### **5. We will follow the same professional expectations as paid staff. by**

- respecting confidentially
- being willing to be trained and to be open minded to new ideas
- being respectful towards members of the school community
- ensuring all communications concerning the PTA are respectful and professional, and are in accordance with the school rules and thus approved by the head teacher
- undertaking roles and jobs to the best of our ability. and by asking for assistance if necessary
- following health and safety guidelines
- treating PTA and school resources with respect, understanding that misuse will affect the pupils
- seeking approval from the chair and/or head teacher before distributing notifications
- mentoring , using succession planning and shadowing to pass on and share our skills
- sharing knowledge and documentation. especially after resignation
- following resignation guidelines as specified in our governing constitution
- promoting the school, the pupils and PTA and not bringing any into disrepute
- understanding damage that can be done through negative comments on social networks
- taking unresolved grievances to the chair at the earliest opportunity
- upholding the school's official complaints procedure by ensuring that any person wishing to make a formal complaint against the school or any of its staff members. does not use PTA meetings or social network pages as a forum to voice any issues they may have. but uses the school's open door policy instead.
- directing those with constructive suggestions and ideas to improve school in any way unrelated to the PTA towards Parent Council meetings.
- referring anything outside our remit to the chair or headteacher
- understanding that if we do not follow these rules. our case may be referred to the governing body of charity trustees and committee membership or officer status may be removed in accordance with the PTA Constitution.

#### **6. We will not expect or seek preferential treatment or financial, material benefit from PTA membership. We will**

- use the correct official channels and school procedures to discuss our own child(ren)
- understand that prize donations received are to be used for the maximum benefit of the school and pupils
- use PTA assets for the benefit of the school and pupils. not for personal or family benefit

## **List of Annexes**

A. **Structure of the PTA**

B. **Volunteer Committee Member Agreement**

C. **Handling Donations**

D. **Handling Cash**

E. **Decisions About Spending**

## (A) Structure of Rivington Foundation Primary School PTA

- All parents, carers and teachers are automatically members of the Rivington Foundation Primary School PTA.
- The headteacher holds an automatic official position on the PTA Committee.
- The roles of Chair, Vice Chair, Treasurer(s) and Secretary are elected annually at an Annual General Meeting, as are a number of Co-opted members and charity trustees.
- Minutes and other PTA documents can be requested by emailing [nking@rivington.lancs.sch.uk](mailto:nking@rivington.lancs.sch.uk)
- Elected Officers / Trustees are now the only members who can hold a vote in the meetings. Voting on matters arising will take place at the end of each meeting after each item has been fully discussed and debated by all members present, and once all other PTA members have left.
- Persons attending meetings represent all PTA members and have the opportunity to add their opinions and discuss any matters they wish to raise appertaining to fundraising, events or spending proposals. Views and opinions brought to the meeting either by a member attending or by proxy, must be taken into consideration by the committee when making any decisions and when voting takes place.
- Persons who are unable to attend meetings, but have opinions on agenda items may send comments, suggestions or queries via [nking@rivington.lancs.sch.uk](mailto:nking@rivington.lancs.sch.uk). They will receive feedback after the meeting has taken place. This will usually be in the form of an email.

**(B) RIVINGTON FOUNDATION PRIMARY PTA:  
Volunteer Elected Committee Member/ Officer/ Trustee Agreement**

As a PTA official, I realise that I am subject to a code of conduct similar to that which binds the professionals at Rivington Foundation Primary School.

Like them, I have certain responsibilities and expect to account for what I do in terms of what I am expected to do: I will act in the best interests of the school community, I will seek to create an inclusive and welcoming community, and I will keep confidential matters confidential.

I will volunteer my time and energy to promote the school and the PTA. I interpret "volunteer" to mean that I have agreed to work without compensation in money, but having been accepted as a worker, I expect to do my work according to the best high standards I can, as the paid staff expect to do their work.

I promise to do my work with an attitude of open-mindedness; to be willing to be trained; to bring to it interest and attention.

I realise that I may have assets that my co-workers may not have and that I shall use these to enrich the project at which we are working together. I realise also that I may lack assets that my co-workers have, but I will not let this make me feel inadequate, but endeavour to assist in developing teamwork.

I plan to find out how I can best serve the activity or role for which I have volunteered, and to offer as much as I am sure I can give, but no more.

I know that one day, I will cease to do this volunteer work, and that in order for the charity to continue to meet its aims, I must plan for this day, seeking successors and sharing my knowledge. I will return all PTA property and documentation upon my resignation.

I believe that my attitude towards PTA work should be professional. I believe that I have an obligation to my work, to those who direct it, to my colleagues, to those whom it is done, and to all children at Rivington Foundation Primary School.

Signed (Chair) Date

Signed (Vice Chair) Date

Signed (Treasurer) Date

Signed (Co-Treasurer) Date

Signed (Secretary) Date



## **(D) Handling Cash - to be signed by all committee members**

To protect PTA volunteers from claims of misconduct, all cash should be handled as transparently as possible. These protocols cover the usual tasks and duties involving cash transactions. Where there are no rules in place for a cash situation, directions can be taken from the Chair or Treasurer(s). No decisions about money should be taken unilaterally. It is good practice for all cash situations to require a minimum of two members present.

### **BANKING**

All cheques require two signatures.

Any banking activity, either payments in or withdrawals should be made by two members of the PTA together whenever possible, for safety and ambiguity.

### **FLOATS**

Cash floats for events must be put together by two PTA officers in order to corroborate the total.

When floats are issued, the volunteer recipient must count their total and record this on the co-ordinating cashing up sheet, immediately upon receipt. The total float amount must be agreed and signed for as being received.

We trust the volunteer recipient to take responsibility of the container for the duration of the event.

At the end of a fundraising event, sealed bags and boxes containing cash must be collected by the Treasurer and a second nominated official and kept safe until counting. The money should never be left unattended at any time or in the possession of anyone other than the nominated officials.

### **POST EVENT COUNT**

The collected, sealed funds must stay in the possession of the Treasurer or Event Co-ordinator until the post event count.

The post event count must be scheduled ahead of the event itself - ideally, for the next available day afterwards.

Strict rules apply to counting funds. The count must be completed by at least two members of the PTA Team, one of whom must be the Treasurer.

Counting must not begin until all members of the counting team are present, as the full counting team must witness each sealed container/bag/box being opened.

Each sealed container will be opened and counted, double checked and recorded on its corresponding cashing up sheet. These figures are to be given to the Treasurer(s) who will oversee administration of the count, and will note all totals and calculate the gross and grand totals of the whole event.

Any discrepancies found must be fully documented by the Treasurer(s) and reported to the Chairperson at the end of the count. It is the Chair's responsibility to advise on the course of action to be taken.

Once all totals are assured and verified and the money is bagged appropriately, preferably two members of the PTA Committee, are to take the funds to the bank to pay them in.

The Treasurer(s) will then obtain all expenditure figures for the event, in order to calculate a true net profit figure. This final figure and full details of the count are to be reported to the Chair, so that the success of the event can be circulated to the other members of the PTA in newsletter form or via email or social networking.

Funds raised from the event must be broadcast by the Chair or Secretary at the earliest possibility.

## **ACCOUNTS**

The PTA fiscal year runs from October to October. Annual accounts should be sent to the Charity Commission within the appropriate deadlines and must be signed off by all members of the committee beforehand. Annual reports will be made available by the Treasurer(s) at the AGM and updated versions should be available on request throughout the year. An updated Treasurer's report will be printed and provided at the PTA meetings at least once a term.

## **EXPENSES**

Authorisation should be sought in advance of making any purchases on behalf of the PTA from the Chair. If prior permission is not received, there is no guarantee that the expenditure will be reimbursed.

All requests for reimbursement must be accompanied by receipts with clear details as to the purchase on the reverse and attached to your Expenses Reimbursement Request Form. Failure to provide actual receipts may result in reimbursement being denied. Please include instructions for whom the cheque needs to be made payable to on your form.

Signed (Chair) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Vice Chair) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Treasurer) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Co-Treasurer) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Secretary) \_\_\_\_\_ Date \_\_\_\_\_



## (E) Decisions About Spending

In order to best serve the community the PTA should seek wide agreement as to where funds should be directed. This can happen in a number of ways, but the PTA will always begin by seeking guidance from the headteacher as to where funds can make the most difference to the school and its pupils, and a PTA committee vote must always be held before releasing funds.

The PTA Committee may seek opinion from the PTA community on spending proposals via newsletters, social networking, or by email. All correspondence must be submitted in written form, via email or by letter, so that it can be taken to the next PTA meeting and represented in a non-biased way, for all members present to consider. All PTA members are welcome to attend the monthly PTA meetings and discuss spending proposals and present their opinions in person to the rest of the committee. All opinions and views discussed in the meetings must be considered when decisions on spending proposals are being made.

The correct procedure for voting on spending proposals, in accordance with the PTA UK guidelines and our governing constitution, is that **only elected PTA committee officials can vote on the decision to spend funds.** This vote must be held in private, following a PTA meeting where the proposal has been thoroughly discussed. All opinions brought to the table during that meeting, either in person, or by proxy, must be taken into consideration when making the vote. Members of the PTA are asked to trust their PTA officials, as elected representatives of their community and in accordance with this mission statement and code of conduct, to make decisions fairly and in an unbiased manner, based up what they think is the best way to spend funds raised in order to maximise benefit to the school and its pupils.

The PTA will spend the maximum possible of all monies raised for the direct benefit of the pupils and will aim to have money raised spent on the school, by seeking out where it can make the most difference.

Unless the PTA is saving money for an agreed 'large spend', money will not sit in the bank account. The PTA will seek and accept spending proposal suggestions from all PTA members on a regular basis.

Spending will be agreed at ordinary meetings, but the Chair may suggest that large spends (over £2000) are sent out for community wide voting, or that advice should be sought from the school or other professional bodies before a decision can be made.

Signed (Chair) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Vice Chair) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Treasurer) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Co-Treasurer) \_\_\_\_\_ Date \_\_\_\_\_

Signed (Secretary) \_\_\_\_\_ Date \_\_\_\_\_

*(Adapted in 2016 from the KMS FRIENDS MISSION STATEMENT, VALUES AND PROTOCOLS TEMPLATE- PTA UK)*