



Ecclesfield Primary School
High Street
Ecclesfield
SHEFFIELD
S35 9UD

Tel: 0114 2467396

Fax: 0114 2570854

E-mail: enquiries@ecclesfield-pri.sheffield.sch.uk
Executive Head J. Eagleton BSc Hons PGCE NPQH

14th March 2025

FIRST ANNUAL GENERAL MEETING - PTA

Dear Parents and Carers,

I am writing to inform you about the PTA's (Parent Teacher Association) first Annual General Meeting (AGM) taking place on **Thursday 17th April at 5.00pm**. This will be held in school in the large hall. At this meeting, we will be deciding on the people who will hold the key roles in the committee: Chair, Treasurer and Secretary.

During this meeting, anyone who is wanting to hold one of these key roles will be asked to put their name forward. If more than one person is wanting to take up a role, there will be a vote of all the other members to determine which person undertakes that role.

All people who undertake key roles will be subject to a DBS check through school. Should you be interested in any of the key roles, there is further information below which will inform you of the responsibilities of the role. During the meeting, we will also be deciding upon the official name of the PTA.

There are a few options that we can choose from:

- PTA (Parent Teacher Association) – All school staff and parents of children at the school
- HSA (Home School Association) – All school staff and parents of children at school
- PA (Parents' Association) – All parents of children at school
- PFTA (Parent, Teacher and Friends Association) – All parents and staff, anyone over the age of 18 years of age that actively supports the association and is approved by members of the committee.



We will also be looking ahead to planning the first event held by the committee to kickstart the launch.

Should you be interested in coming along, please arrive at school for the 5.00pm start. You can be a part of the committee without undertaking one of the key roles, so we encourage all who would be interested to attend.

Thank you for your continued support,

Mrs Robinson
Head of School

Chair

The PTA Chair directs your committee's meetings, making sure that everyone is involved in the meeting and that their views are heard. They ensure that all committee members are familiar with the association's constitution, model policies (if applicable) and their role and responsibilities as a committee member (and trustee, if your PTA is registered as a charity). The PTA Chair also holds the casting vote when there is a tied vote. This usually defers the decision to the following meeting, allowing committee members more time to consider and discuss the matter. The Chair's role can be held by one person or shared by Co-Chairs. If it is held by Co-Chairs, both individuals are equally responsible for carrying out the role.

Duties and responsibilities of the PTA Chair:

- Prepares for meetings (with the Secretary)
- Invites committee members, parents, and staff to PTA committee meetings
- Suggests items for the agenda
- Identifies outstanding items from the last meeting
- Prepares introductions for any new committee members attending
- Sets the ground rules for meetings, ensuring they are inclusive and efficient
- Delegates tasks to other committee members and volunteers, and checks that they're completed
- Issues 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 with respect to the governance of the association as set out in its constitution and policies e.g. 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 the PTA's constitution. The PTA Chair cannot make decisions alone: all decisions must be made by the whole PTA committee
- Writes the annual report for the association (with the Secretary)
- Writes the Chair's report for the AGM
- Can be a signatory on the PTA bank account (along with at least one other committee member)
- Ensures 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 PTA, the Chair must be inclusive, and make sure everyone feels welcome
- Organised and able to delegate:** Most PTAs organise a lot of activities. The PTA Chair should make sure the workload is shared appropriately and that tasks are completed



Treasurer

The PTA Treasurer makes sure all committee members carry out their duties in relation to the control and management of PTA funds. Your association's committee is collectively responsible for the finances of the association and must therefore formally agree upon any spending of funds. However, it is the Treasurer's responsibility to ensure all financial transactions are presented and recorded correctly. The Treasurer's role can be held by one person or shared by Co-Treasurers. If it is held by Co-Treasurers, both individuals are equally responsible for carrying out the role.

Duties and responsibilities of the PTA Treasurer:

- Keeps accurate, up-to-date financial records
- Presents financial updates at each committee meeting
- Manages the PTA bank account and holds the association cheque book
- Arranges changes of signatories on the association bank account
- Manages chosen payment platforms
- Ensures all bank cards, chequebooks, and paying-in books are accounted for and obtained from any individual leaving the PTA
- Ensures best practice procedures are followed for counting and banking money after events
- Makes approved payments
- Ensures procedures for making approved payments and claiming approved expenses are followed by all committee members
- Prepares the annual Treasurer's report for your AGM and arranges an independent examination of the association's accounts
- Completes the relevant Charity Commissioners' annual return (if the PTA is registered as a charity)
- Manages Gift Aid, or assets of the committee member(s)
- responsible for managing Gift Aid
- Ensures committee members have read a copy of your association's insurance policy summary, which should detail cash cover, and that they adhere to any guidelines contained in the document

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

Secretary

The PTA Secretary supports the PTA committee to build effective communication links between school and the association. They also maintain accurate records. The PTA Secretary role can be filled by one person or by Co-Secretaries. If it is held by Co-Secretaries, both individuals are equally responsible for carrying out the role.

Duties and responsibilities of the PTA Secretary:

- Prepares for meetings (with the PTA Chair)
- Takes minutes at meetings, recording attendance, action points, decisions and proposals
- Circulates approved minutes, along with reminders of any actions agreed
- Maintains association records
- Makes sure the association is 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))
- Handles the association's correspondence
- 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

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


