

Winwick C.E. Primary School

PTFA Job Roles

CHAIR

Role Summary

The Chair works closely with the Vice Chair, Treasurer and Secretary to ensure that the PTFA is run effectively and smoothly. The Chair upholds the Constitution of the PTFA and prepares and submits required statutory reports to Regulatory Bodies. The Chair leads meetings, oversees the running of annual fundraising events and has the final say on PTFA decisions. The Chair ensures that communications between the PTFA, Headteacher, Governors and St. Oswald's Church, Winwick are effective, transparent and cohesive. The Chair encourages the PTFA to promote and demonstrate the School Values.

Key Responsibilities & Duties

- Ensure that PTFA meetings run smoothly and efficiently, are on time and are run in an inclusive and friendly way
- Welcome contributions from all members of the Committee so that everyone feels involved
- Delegate tasks to other members of the Committee and PTFA group and make sure these are completed
- Provide leadership for the Committee and PTFA members. Ensure that all PTFA members understand that they are there to represent all parents in the School
- Is the Spokesperson for the group and liaises with the Headteacher and School etc.
- Write the annual PTFA report in co-operation with the Secretary and set the Agenda for meetings
- Welcome and involve new members
- Sign cheques for the PTFA with one other Committee member
- Meet with the Headteacher, Treasurer and Secretary to agree PTFA financial and project commitments for the year
- Plan for succession planning of Chair and other Committee roles

Personal Characteristics & Skills

- | | |
|---------------------------|---------------------------------|
| • Enthusiastic | • Strong presentation skills |
| • Calm | • Speaks clearly and succinctly |
| • Able to delegate | • Good team-builder |
| • Decisive | • Approachable |
| • Excellent communicator | • Good listening skills |
| • Collaborative | • Good networking skills |
| • Tactful | • Sensitive to others' feelings |
| • Impartial and objective | |
| • Organised and timely | |
| • Good networking skills | |

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VICE CHAIR

Role Summary

The Vice Chair deputises for the Chair when necessary and supports the Vice Chair in providing leadership and operation of the Committee. Helps set the Agenda for meetings and helps manage meetings in line with the Agenda.

Key Responsibilities & Duties

- Steps in for the Chair when the Chair is absent
- Work with the Chair to ensure the PTFA runs smoothly
- Support the Chair in providing leadership
- Prepare meeting Agendas in consultation with the Chair
- Prepare the Annual Report and annual Agenda for the AGM in consultation with the Chair
- Welcome and involve new members
- Lead parent and community engagement in the PTFA (e.g. class representatives, use of local contacts and skills)
- Plan for succession planning of Vice Chair role

Personal Characteristics & Skills

- Supportive
- Organised
- Collaborative
- Decisive
- Excellent communicator
- Collaborative
- Tactful
- Impartial and objective
- Organised and timely
- Strong networking skills
- Good presentation skills
- Speaks clearly and succinctly
- Good team-builder
- Approachable
- Good listening skills
- Good networking skills
- Sensitive to others' feelings

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TREASURER

Role Summary

The role of the Treasurer is to manage and control the funds that the PTFA raises and to oversee the PTFA's financial affairs. The Committee members have equal responsibility for the control and management of PTFA funds, however the Treasurer plays an important part in helping the Committee carry out these duties properly. The Treasurer will record all income and expenditure, details of the amounts received and spent and will have the information available for every Committee Meeting. This information should be recorded in the Minutes. If the Treasurer is unable to attend a Committee Meeting then a written report should be sent to the Chair at least one day before the Meeting. All financial decisions taken should be recorded in the Minutes of each Meeting.

Key Responsibilities & Duties

- Maintain up-to-date financial records including the balance of funds, committed expenditure, income, expenditure and profit from each event held
- Day-to-day management of accounts, including issuing bills and receipts on behalf of the PTFA and making payments
- Liaise with the bank, count and bank monies and reconcile bank statements
- Advise the bank of agreed changes to the bank mandate, i.e. those authorised to sign cheques.
- Charity registration and Gift Aid
- Prepare a concise Financial Report for the Annual General Meeting
- Raise and sign cheques with a second Committee Member co-signing. The person co-signing must see what is being paid for before signing. The Treasurer should sign last and keep all original invoices
- Withdraw money for floats for fundraising events, collect and reconcile monies raised at these events and report totals raised to the appropriate Stakeholders. Money raised at School events will be locked in the School safe after the event
- Monitor funds held on account and discusses with the bank or building society the use of higher rate investment accounts. Any decision to use an investment account, including the amount to be put in the account, should be taken by the whole Committee
- Ensure regular payments, e.g. ParentKind membership, are made on time to guarantee benefits and take advantage of any discounts
- Arrange appropriate licenses for events
- Plan for succession planning of Treasurer role

Personal characteristics & Skills

- Reliable
- Organised
- Good with numbers
- Detail oriented
- Methodical
- Cash handling
- Good communication and interpersonal skills
- Decision-making
- Good time-keeping
- Impartial
- Trustworthy
- Approachable

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SECRETARY

Role summary

The Secretary is responsible for ensuring strong and effective communication links between Committee members, the PTFA, School, Governors and St. Oswald's Church, Winwick. The Secretary deals with the correspondence that the PTFA receives and helps the Chair ensure that Committee meetings run smoothly. The Secretary should build and maintain good relationships with all School staff and Stakeholder parties. Following Committee meetings the Secretary will make bookings and other arrangements for events. The Secretary will make arrangements for the Annual General Meeting (AGM) and help the Chair to prepare the Annual Report. The Secretary may also be involved in co-signing cheques on behalf of the PTFA and should keep up-to-date records of day-to-day PTFA activity.

Key Responsibilities & Duties

- Organise PTFA meetings, prepare and distribute meeting Agendas and Minutes including the Annual General Meeting (AGM)
- Build strong relationships with all School staff and ensure effective and collaborative communication links between all Stakeholder parties
- Share and distribute all required information with the necessary parties in a timely manner
- Deal with PTFA correspondence
- Help the Chair to ensure that meetings run smoothly
- Liaise with the School office regarding printing and distribution of information for events e.g. mailings / Newsletter / texts / Ping notices.
- Help to prepare flyers, posters, tickets etc. for events and communicate PTFA events within the School and wider community
- Co-sign cheques as required
- Help the Chair prepare the Annual Report
- Maintain a database of volunteers, ensuring strong adherence to GDPR
- Plan for succession planning of Secretary role

Personal Characteristics & Skills

- Target and deadline focused
- Excellent communication skills
- Strong time management skills
- Personable and friendly
- Good organisation and planning skills
- Objective
- Strong interpersonal skills