



LIONHEART
EDUCATIONAL
TRUST

PTA POLICY

**This policy applies to all the academies in
The Lionheart Educational Trust**

Approved by Trust Board – March 2023-2025

Background

The value of the PTA

As a Trust we greatly value the PTAs in schools. The work of a good PTA can bring a strong sense of community and belonging to children and families, and funds raised through PTA activities provide resources and enrichment activities to enhance the experience of pupils and support their learning.

Working together

PTAs within Lionheart Educational Trust schools belong to the school and are not independent organisations. Senior leaders support the work of the PTA, and have the final say in all PTA matters, reflecting the fact that the school is, first and foremost, a place for learning. The Headteacher / Principal has an overview of the whole school, and is in a unique position to judge whether events, activities, etc. will place a strain on the smooth day-to-day learning of the children. For this reason, all PTA activities must be signed off by the Headteacher / Principal or a senior leader who has delegated responsibility.

Roles within the school

Schools are aware that parents involved in the PTA are in a complex position as they hold more than one role in the school. As a parent they engage with the school over their child's learning, any concerns they may have around the education being provided, etc.

As a member of the PTA they are in a position of trust, in which they may be better known to staff and senior leaders than some of the parent community. This does not, however, place them in a position of representing the parent body's concerns to the school, or raising their own or others' individual parental concerns with senior leaders whilst in a PTA member role, such as at PTA meetings. Members of the PTA work to support staff in providing the best possible outcomes and experiences for all pupils.

Parents who are interested in a role involving holding the school to account for teaching and learning, the strategic direction of the school and the best use of financial and other resources should instead consider joining the Governing Body. Parents are able to nominate themselves as a Parent Governor when elections are held in the school.

A good working relationship

This policy outlines the expectations on both parties to support an effective working relationship and the smooth running of the school.

Planning events

Planning the year

In the summer term, the Chair of the PTA and the Headteacher / Principal or delegated senior leader will meet to plan the year's calendar, based on decisions already taken by senior leaders regarding key school activities and dates. The PTA will already have discussed ideas and preferred dates, and the Headteacher and will work with the Chair to agree the calendar of PTA events, which will then be shared with parents through the school newsletter.

Premises bookings

The school is primarily a space for children's learning and any activity outside the school day should ensure that learning can take place effectively when children return to the building. The responsibility lies with the PTA to ensure that any spaces used are cleaned before leaving.

Any requests to set up events during the children's school day should be agreed with the Headteacher in the early stages of planning and at least 7 days in advance. It should not be assumed that this will automatically be agreed. The Headteacher will be aware of learning planned within the building and, for instance, setting up an event from 2pm in the hall may not be possible because of PE lessons. Asking well in advance prevents any last minute frustrations for the PTA and / or the staff.

The specific spaces to be used should also be agreed. Classrooms will not usually be available as staff need to be able to return to them following an event knowing that they can teach immediately and that their resources are intact.

Where possible events should take place outside the children's school day but within the normal working hours of the premises team. Where this is the case, the use of the building will not incur a cost, but where an event involves paying overtime to a member of the premises team, this will need to be paid to the school from the profits of the event.

Parents who bring their children into school outside the school day in order to help with setting up are fully responsible for the safety and behaviour of their own child, and should ensure that children do not access any areas of the school not specifically booked for the event. Children are not allowed in any kitchens or staff rooms.

Catering

All schools are expected to ensure that any food served or sold on the premises has been prepared following food hygiene guidelines. Any members who will be regularly involved in events would need a Level 2 certificate in Food Safety which the Trust's Head of Catering would be happy to give details of where this can be purchased from (sarah.nash@lionhearttrust.org.uk).

The Head of Catering is also willing to consider requests for the catering at events to be run by the Trust catering team, or for large batches of cakes or biscuits to be prepared at a reasonable price for re-selling at events.

Where an external caterer is used and food is prepared elsewhere and brought onto the premises, the PTA is responsible for ensuring that the caterer provides their food hygiene certificate and signs a personal liability form at least 7 days in advance. If these are not in place, the catering must be cancelled. The office can provide a disclaimer form and explain what needs to be in place. All external catering should be agreed by the Headteacher before an agreement is made with the caterer.

Where the event involves high-risk food such as a barbecue, this must either be by an external caterer, as outlined above, or by the Trust's in-house catering team.

Bake sales and cake competitions are a positive way to bring communities together but bring their own risks, as food brought into school will have been prepared in a variety of kitchens and by parents with varying levels of food hygiene training. Where these are held, a notice should be clearly displayed stating 'Many thanks to everyone who provided food for us to sell today. If you are buying, please note that we cannot make any guarantees with regards to allergens, ingredients, shelf life, preparation methods, and food hygiene practices. The Lionheart Educational Trust does not accept any responsibility for any claims made due to illness resulting from consuming food not provided by the school/college's own catering service.'

You can serve home-made cakes at community events. They should be safe to eat if:

- a recipe from a reputable source is used
- the people who make them follow good food hygiene advice
- the cakes are stored and transported safely
- Making and transporting cakes

If you make a cake at home:

- use recipes from reputable sources
- always wash your hands before preparing food
- make sure that surfaces, bowls, utensils, and any other equipment are clean
- don't use raw eggs in anything that won't be thoroughly cooked, such as icing or mousse
- keep cheesecakes and any cakes or desserts containing fresh cream in the fridge
- store cakes in a clean, sealable container, away from raw foods

On the day, when you bring in cakes from home or run the stall, you should:

- transport cakes in a clean, sealable container
- make sure that cheesecake and any cakes or desserts containing fresh cream are left out of the fridge for the shortest time possible, ideally not longer than 4 hours
- when handling cakes use tongs or a cake slice
- Storing cakes

You can keep cakes and baked goods with high sugar content in:

- airtight containers - this will prevent mould growth through absorption of moisture from the atmosphere
- the fridge - cakes will last for longer, but their quality may be affected

Any cakes with high moisture additions, such as cream added after baking, should not be left at room temperature. They must be stored chilled (in the fridge) and eaten within the use-by date of the added product.

There are some types of icing, such as ganache and buttercream, that can be kept outside the fridge. It's best to store them somewhere cool and dry. Check the guidelines for storage of the particular icing product you will be using.

The school kitchen is not generally available for PTA use, as it operates under strict food hygiene standards (which include the avoidance of allergens) in preparing food for children. Any exceptions to this must be agreed with the Head of Catering at least a month in advance.

The Staff Room includes a water boiler which can be used to provide hot water for preparing drinks. This is a working environment for staff and is likely to include confidential information which should

not be shared or commented on by PTA members and helpers. Because of this, children are not allowed in the staff room.

Storage

The Headteacher is responsible for allocating storage space within the school, having prioritised teaching and learning resources. Where possible space will be allocated to the PTA for storing resources, but limits on storage should be borne in mind when buying resources for events.

Risk assessments

A completed risk assessment must be given to the office by the event organiser at least 7 days in advance for sharing with the Headteacher. No event can take place without a risk assessment which has been agreed with the Headteacher and shared with all volunteers working at the event.

The Headteacher will be able to offer support in understanding how to complete a risk assessment, but are not able to complete the assessments on behalf of the PTA. This should be requested well in advance of any event to ensure that there is time to arrange a short training session.

Bouncy castles, inflatables and hired rides

Bouncy castles and inflatables present a significant risk and should only be managed by experienced external staff as there have been life-changing injuries at some school events in other areas where this has not been the case. It is therefore not possible for PTAs to arrange to hire in a bouncy castle and staff it themselves.

All bouncy castles and inflatables used in the schools must be booked to include the hire of the castle/inflatable, staff to run the activity and insurance cover for any injuries up to £10 million. A copy of the insurance and risk assessment received from the provider should be handed in to the office, and confirmation given that the activity will be externally staffed, at least 7 days in advance of the event or the ride will not be able to go ahead.

Similarly, any fairground rides must be provided with insurance, a risk assessment and external staff. Inflatables and rides can usually be hired in this way with a profit share or a lump sum payment to the PTA.

Raffles

If a raffle is arranged which is drawn within the event there are no legal rules to abide by.

If raffle tickets are sold in advance and the raffle is drawn at the event, or at a later date, there are legal rules which the PTA must abide by including obtaining a license and printing tickets with full details, including the promoter. Information is available here: <http://www.pta.co.uk/licences/keepit-legal/faqs-raffles.aspx>

Resources in the family of schools

Each PTA has a set of resources and it may be possible to borrow items from another school, or from contacts within the schools.

It may also be possible to hire a space in another school such as an auditorium either for free or at a small charge (depending largely on whether this would involve additional premises staff or the loss of a commercial booking).

The Headteacher should be able to make links with other groups where this is useful.

Events where children are unaccompanied

A member of staff must be present at all events where children will be unaccompanied. In order to facilitate this, the day and time of the event must be agreed well in advance and must take account of the busy working lives of staff within the school, and the particular demands of the academic calendar, avoiding times such as SATs weeks, report writing periods, etc.

Communication

Communication with parents

Having agreed the annual calendar of events, the Headteacher and Chair of the PTA will also agree the deadlines for communication to parents. All PTA communication, posters for display etc. should be sent to the office. They will then be signed off by the headteacher before the office sends them out to parents / adds them to a display.

If a PTA email account is created this should only be used by the Chair and Secretary, in order to ensure that there is clarity over where the communication originates. The Headteacher should have log in details for the account.

Social media

There is value in having PTA facebook, twitter and other social media accounts. These should be:

- Monitored very regularly, with any comments which could bring the school into disrepute immediately removed
- Shared with the Headteacher, who must have administrator rights at a level which can close the account

Some parents choose not to have photographs of their children shared on social media through personal preference or to protect the child, for instance where the child has been adopted. The school holds information on which children this affects and any photographs should be checked with the office before including in social media, PTA promotional materials, etc.

Display space

The school will provide space to advertise events and meetings using posters etc. All items for display should be handed into the office.

Communication with the Headteacher

All key communication regarding PTA matters will be between the Chair and the Headteacher. In this capacity, the Chair may have access to the Headteacher's email address and mobile number, neither of which are available to the wider parent body. These should be kept confidential.

Emails from other members of the PTA should be sent via the main school office, making it clear who the email is being sent to in the subject line.

Contact by phone should also be via the school office, leaving a message where necessary to ask for a return call, bearing in mind that the Headteacher has a busy schedule and may need to take time in returning the call.

Raising concerns

The relationships between the PTAs in our schools and staff are usually positive and effective, with each respecting and valuing the role of the other, and all keeping the learning of children at the heart of all they do.

Occasionally issues may arise in which it would be helpful to involve a third party in order to move forward. In this instance, the Chair or Headteacher should contact the Chair of Governors to ask for a meeting to talk through their concerns. This is seen as 'raising a concern', and as such falls outside of the school's formal Complaints Policy.

Meetings

Key members of the PTA team

Every PTA needs a Chair, Secretary and Treasurer. In the summer term, the PTA elects members to these posts for the coming academic year, and the outcome of the election is passed to the Headteacher and governors. Nominations should be invited via the agenda (which goes out to all parents in advance of the meeting), and received by the PTA Secretary no less than 72 hours in advance of the meeting. The election is by majority vote.

It is the responsibility of the Governing Body to ratify the recommendations made by the PTA, and the Governing Body also has the right to decide, in exceptional circumstances, that a person recommended by the PTA cannot be appointed. In this case, there will be a discussion with the current Chair and the parent themselves.

Each PTA must have a Treasurer who will keep income and expenditure accounts and will share updated accounts at each meeting, with paperwork being sent in advance (see below). Where a treasurer is elected who would value support, the office team will be able to help in setting up a simple income and expenditure accounting system. The PTA and the school need to be mindful that the financial management of the funds raised by parents must be transparent and beyond reproach. Where events involve parents paying in advance, such as discos, parents should be asked to complete a form which makes it clear which child the funds relate to and send this into the office in a sealed, named envelope ready for counting by the PTA.

At any stage the Treasurer should have a cash fund of no more than £50. All funds in excess of this should be passed to the school immediately they are generated.

Once all income has been received for an event, the Treasurer will settle all claims for costs, ensuring that no payments are made to PTA members without an official receipt and a completed claim form, and the profit passed on to the school.

The school will ring fence all funds generated by the PTA for spending in line with the agreement made between the PTA and the Headteacher, as outlined above.

Meetings

Meeting dates will be agreed by the Headteacher and Chair as part of the annual calendar.

Every meeting must have an agenda, which should be sent to the office at least 7 days in advance. This will be seen by the Headteacher before forwarding to parents, along with an updated accounts sheet (see above).

The timings of meetings will impact on the capacity of the Headteacher, or their representative, to attend. Evening meetings are particularly challenging and may be impossible. Where this is the case, the Chair will email the Headteacher within a few days of the meeting to share any ideas and decisions, and gain their agreement before putting any of these into action.

Meetings should be minuted, and minutes sent to the office within 2 weeks of the meeting. These will be read by the Headteacher and then forwarded to parents and included within the paperwork for the next Governing Body meeting.

Papers for meetings

Papers can be photocopied in advance by the office if received 7 days in advance of the meeting.

DBS

The core team of the PTA (Chair, Treasurer, Secretary and the Executive team – those who attend meetings regularly) all need to complete a DBS check. All events must be led by someone who has a DBS and who is present on the day.

Any helpers and volunteers who do not have a DBS which has been arranged by the school must not be left alone with children at any stage during an event.

Spending decisions

Spending funds

Where possible the funds raised by the PTA will be used to benefit most of the children. Sometimes this will be through buying something which benefits one year group or Key Stage, and which all children will gain from at some stage in their school life. At other times this may be something which benefits most of the children at one moment in time.

The final decision on how funds should be spent lies with the Headteacher, following discussion with the PTA. The Headteacher sees the full picture of the school including:

- Planned future developments (e.g. playground developments)
- Resources needed to support the curriculum (e.g. musical instruments, library books, iPads)
- Experiences which would enrich children's learning (e.g. author or pantomime visits)

There are imaginative ways in which this decision could be made, for instance, staff could be invited to send a wish list based on the school's priorities and the PTA could decide which item(s) they feel parents would be most willing to support by fundraising in the coming year.

PTA Key resources

The rules within each individual PTA should include stated levels at which spending should be signed off by a) two or more of the PTA executive and b) Headteacher to allow for the purchase of key resources such as Santa costumes, large games for fairs, etc. These levels should be agreed by the Headteacher each year in September.

An inventory of items should be kept and included in the budget sheet shared at each meeting.

The schools have access to purchasing through ESPO, which is sometimes cheaper than buying online or on the high street and is available for school purchases but not for buying items for an individual's personal use. A copy of the catalogue is available in school and purchases can be made through the office.