

Guide to completing the online charity registration application

Before you start

Read the application questions, including the guidance notes, carefully and answer them fully. The Charity Commission only assesses applications that are completed in full and expects you to provide accurate and comprehensive information.

Your application needs to satisfy the Charity Commission that:

- your organisation is a charity
- trustees understand their roles and responsibilities
- you have read the Charity Commission's guidance on when and how to register your charity before you start the application process.

Please note: for most charities to register you need to have £5,000 income per year but **Parentkind members** are able to register under this income level if using the Parentkind Model Constitution **without any modifications**.

This information is a guide for PTAs and some answers for your association may differ, therefore there may be questions that we have not covered. Please get in touch with the Member Support Team if you have any questions on 0300 123 5460.

Key things you need to consider

- Ensure your constitution is 'fit for purpose' (as a Parentkind member, you can adopt our [Model Constitution](#), pre-approved by the Charity Commission to ensure a smooth process)
- Get people elected to your committee through an [AGM](#)
- Make sure you have accounts set up. Check out our information for [treasurers](#).
- [Set up a bank account](#) – all organisations registering to be a charity must have already set up a bank account.

To complete your online registration you will need to have the following documents in PDF format ready:

- Signed copy of the adopted [constitution](#).
- Your PTA's latest financial report – probably the treasurer's report from the last AGM.
- PTA bank statement – this has to be less than three months old at the time of registration.
- Completed Trustee declaration (make sure they have read the [safeguarding guidance](#) too, see section 9).
- Details of your Trustees – these are all your elected committee members. You'll need their names, contact details including home address and date of birth.

1. About your Charity

The Charity Commission use a blue PUBLIC file box to show anything that will be on their website for public display.

Your governing document

If you are using the Parentkind Model Constitution (Charity Commission approved):

- Tick constitution on the list
- Click that your constitution is from an umbrella body and then select Parentkind from the list, this will auto fill some of the field so no modifications can be made
- Attach a PDF signed copy of your document when directed
- To be fast tracked our model constitution must be used without modification

If you are not using the Parentkind Model Constitution:

- Select the option that best describes your governing document

Charity Name

- State the name of your PTA in full
- Make sure you use exactly the same name in all the paperwork you put together for your charity registration application (this includes your PTA bank account, governing document, trustee declaration form and the application form)
- If your organisation is known by another name, you can add this. For example if you are the Friends of South School, you might be known as “FOSS” for short
- You will be asked to explain any acronym in your name, e.g. PTA means parent teacher association

Structure and Purposes

You'll be asked to fill in the date your constitution was adopted and the purpose of your organisation. If you ticked earlier that you are using Parentkind's Constitution the purpose will be prepopulated for you.

It will state your purpose as:

THE OBJECT OF THE ASSOCIATION (THE OBJECTS) IS TO ADVANCE THE EDUCATION OF PUPILS IN THE SCHOOL IN PARTICULAR BY: DEVELOPING EFFECTIVE RELATIONSHIPS BETWEEN THE STAFF PARENTS AND OTHERS ASSOCIATED WITH THE SCHOOL;

ENGAGING IN ACTIVITIES OR PROVIDING FACILITIES OR EQUIPMENT WHICH SUPPORT THE SCHOOL AND ADVANCE THE EDUCATION OF THE PUPILS.

2.Income

You will be asked to enter the organisation's gross annual income and what proof you are attaching. Please then attach the evidence for example your latest accounts, a recent bank statement or a formal offer of funding from a recognised funding body.

If you enter under the £5,000, you will be asked to exit the application, however if you are using the Parentkind Model Constitution then continue onto the next step. At the end, you will be required to make a declaration of this when asked for any additional information (see step 10).

3. Classification

What

What is the organisation set up to achieve?

Tick all that apply to your PTA - this will to an extent depend on your PTA but generally the following would apply:

- general charitable purposes
- education/training/research
- supporting an educational establishment or students
- type of education - primary/infant/secondary that fits your school. You must be clear on your application to explain any activities that fall outside standard PTA activities. These might include supplementary education for example running an after school club or sporting activity.

How

How does the organisation achieve it?

Tick all that apply to your PTA - generally this is likely to be as follows but all PTA activities will vary:

- provides other finance
- provides services
- other You can also add your purposes e.g. developing effective relationships between staff, parents and others associated with the school. Under Education/Training/Research, tick Parent/Teacher association.

Who

Who does the organisation help?

Tick all that apply to your PTA-generally this is likely to be:

- children/young people under Education/Training/Research: Pupils/Students attending a named educational establishment

Where

Click the specific areas to England and Wales you will then be prompted to say exactly where using a drop down list.

Public Benefit

In Steps 7 -9 The Commission expects to see responses that are a true reflection of what your PTA does and how it does it. This includes the public benefit requirement. The Commission will not allow you to copy and paste these responses. Your application may be rejected if you copy and paste the answers below and they are not appropriate for your organisation. You should only provide answers which truly reflect how your PTA operates. But here are some examples.

Education

What educational establishments does the organisation support and how? Name the schools you support and how you carry out your purpose, this will depend on your PTA and its activities.

Typically, PTAs work with staff, parents and others associated with the school and engage in activities that provide goods and equipment to support the school and services.

What support does the organisation provide to students and where?

Example: workshops, educational trips, entertainment – at the school

Purpose

Carrying out the purpose

Explain how the organisation carries out its purpose

EXAMPLE: Our PTA works with our school, parents, pupils and the local community to put on a range of events and activities, (you should give examples). These help to build the school community, break down barriers and help fundraise. We use our funds to purchase a range of goods and services that help advance the education of pupils at our school (again, you should provide examples).

Explain how the organisation carries out its purposes.

Working with staff, parents, pupils and the local community to put on a range of events and activities. To help build the school community, break down barriers and raise funds. Engaging in activities and providing facilities.

Benefit

What are the benefits of the organisation's purposes?

- Explain how the organisation benefits the general public or particular groups of people. Give examples wherever possible.

Example response: All our activities help advance the education of pupils at the school. We raise funds to help support additional activities, such as school trips and supporting school initiatives such as science and maths weeks. We put on events to bring parents, teachers, pupils, and the community together. For example, we have funded (give examples).

If you have any documents that demonstrate how your organisation benefits the general public you can attach them, but this is optional.

- Who can benefit from the organisation's purposes?

Within the school environment our organisation benefits all pupils at our school.

Click 'Specific section of the public' and then click on the categories that apply to your school. This is likely to be 'People defined by age'. You will then be prompted to,

- explain how the trustees are satisfied that this is justified under the Equality Act.

Age is one of the protected characteristics under what the charity commission refers to as the 'charities' exception'. This exception allows a charity to discriminate by limiting the group of people it helps. If your PTA is relying on the charities' exception in its application, you will need to state whether test A or B applies to your PTA and explain how or why it applies. Please see the charity commission's [Equality Act guidance for charities](#) (4.1) for further clarification.

- Test A: Tackling disadvantage. This test is met if a charity's aim is to tackle a particular disadvantage faced by people who share a protected characteristic.
- Test B: Achievement of a legitimate aim. Test B applies where a charity is not tackling a particular disadvantage but is seeking to achieve some other legitimate aim in a fair, balanced, and reasonable ('proportionate') way.

Selection

Carrying out the purpose for the public benefit.

- What criteria do the trustees use to decide who the organisation benefits or what work it does or supports?

Example response: We, as trustees, decide as a committee how to spend the funds we raise. (Provide details of any process or criteria your PTA has in place for deciding this.) We take advice from the headteacher at our school and/or other members of the senior leadership team on goods and/or services that are required to advance the education of pupils at the current time. We also consult parents and pupils on their views (again, if you do this, give examples of how).

We may undertake some longer-term projects depending on the needs identified to advance the education of pupils at the school. For example, funding a new playground or a classroom redevelopment. These projects may require funds to be raised over a longer period of time.

Grant Making

- Is the organisation a grant maker?

Your PTA may or may not make grants to individuals.

Example response: Our PTA on occasion makes grants to individual pupils. We use the application process and the grant itself to advance their education. We have strict criteria relating to the number of applications that can be received from each pupil and how any funds granted can be used. The application must relate to

developing their learning or a specific skill, for example, training to be a volunteer football coach.

Any grant making policy should include details of how the trustees decide which children will benefit from the grants. You will need to provide details.

Membership

- Do people or organisations have to be members of the organisation to benefit from its purpose?

No.

Providing services and facilities

- Does the organisation provide public facilities or services as a way of carrying out its purpose?

No, we do not provide facilities or services for the public.

Fees and charges

- Does the organisation charge people to be a member or to access its services or facilities?

No. (All the goods and services provided for the public benefit are accessed by pupils through the school.)

4. Property

- Does the organisation use premises owned by a trustee or someone related to a trustee?

No

- Does the organisation have use of land or property?

Select yes if the school allows this. If yes is selected a new drop box appears.

- Does the organisation own the land or property?

No

- Who owns the land or property and who gives the charity permission to use it?

Explain what type of events you hold on the property, for example, fetes, discos, camp nights.

- Will any land or property used by the organisation benefit from business rate relief?

No

5.Contact information for this application

- In what capacity are you submitting the application? (Select one)

Select an option from menu provided. Your answer is likely to be that you're a trustee (a trustee is a PTA committee member).

- Is the contact for this application an individual or an organisation?

The charity commission needs a point of contact for your application. You can specify an individual (most likely to be you) or details of your PTA. This information isn't displayed publicly. If you're using your PTA as your organisation, use the school as your address as PTAs use the school address as their public address.

- Organisation contact (used by the charity commission only)

This section allows you to specify a different main contact for the organisation. You can also use the 'find contact' function and reuse the information you've already provided for the application contact.

- Organisation details

These details will be publicly displayed so you should provide the school's address and the PTA's website and other details.

6.Regulators

- Other regulators

None.

- Do you have a gift aid number from HMRC?

Give details if you have.

7.Finance

Income and bank details

The charity commission requires proof of income before it can register a charity. You'll be asked to attach your PTA's latest accounts and to confirm the details of its bank account. You'll need to find a bank account that allows you to open an account while waiting for your application to be approved. A dual signatory account is a good option, which you can change to a charity account once you have registered as a charity. As a member of Parentkind, you're eligible to register as a charity even if

your income is under the £5,000 legal threshold. Please note that you'll still be required to confirm proof of income regardless of whether you're over or under the £5,000 threshold.

Funding

You'll be asked to select all the ways you receive funding and to explain briefly who your donors are and the level of funding they provide. The charity commission provides guidance on this.

Depending on your PTA, you'll tick public donations and potentially, corporate sponsors, grants, and commercial sponsors. You'll be asked what procedures you have in place to identify and verify donors ([see guidance here](#)). For example, for sponsored events, sponsor forms were provided and gift aid forms attached.

Gift Aid

- Other than public donations that are eligible for Gift Aid, do the trustees intend that the proposed charity will take part in any other arrangement, which might reduce the amount payable by any other person?

No.

- Is it intended that the organisation will hold any funds or assets in overseas investment companies or trusts?

No.

Employment

Click 'no' because your members are volunteers.

Goods or services

If you're buying goods or services from a trustee, a person related to a trustee, or an organisation related to a trustee, you will need to say so here. You'll be prompted to name the trustee and the nature of the goods or services being purchased.

The Parentkind model constitution permits some trustee benefits with relevant controls (Clause 9). For more information on personal benefit see section 6 of the [Charity Commission's guidance on the public benefit requirement](#). See also [Charity Commission's guidance on trustee expenses and payments](#).

Other personal benefits

If you answer yes to any of this section, you will be prompted to give further details of the trustee and the nature of the benefit they would be receiving.

8.Connections

- Is the organisation linked to, or has it been established by a non-charitable organisation?

No

Managing risks

- Does the organisation work with children or vulnerable people?

Yes.

Because your PTA works with children, you will be asked to confirm that all of your trustees have read the charity commission's guidance on '[Safeguarding and protecting people for charities and trustees](#)'.

NOTE: The charity commission does not direct charities in relation to carrying out DBS checks. It is NOT a requirement for your charity to ensure all your committee members are DBS checked.

9.Trustee Details

Trustee numbers

- How many trustees?

Your PTA's elected committee members are its trustees, regardless of their role.

- What is the minimum number of trustees the organisation governing document say it must have?

If you have adopted the Parentkind model constitution, it requires your PTA to have a minimum of two trustees. (See 1.4 of the Parentkind model constitution).

Trustee information

If you believe there is a special circumstance that requires all the names of the trustees to be kept off the public register, there is guidance on this.

You will need to collect the following information for every trustee:

- title
- name, to be displayed on the charity commission's website (if a trustee doesn't want their name published on the commission's website, they can put forward a reason why this shouldn't happen)
- if they have ever used a different last name or surname
- honours/qualifications
- date of birth (not displayed on the commission's website)
- home address (not displayed on the commission's website)

- telephone number
- email address
- date of appointment (when elected)
- whether they are the chair
- eligibility to act as a trustee
- if they are a trustee of another charity.

Submitting the trustee declaration form

Once you've filled in details for all your trustees, you'll need to attach a completed [trustee declaration form](#), signed and dated by each trustee. You may be prompted to upload this to a specific place. If not, you can attach it at the end of the application process, when you're asked, 'Do you want to attach any supplementary documentation?'

The trustee declaration form must be attached when you submit your application to register as a charity. It will delay registration if you do not attach it. Please read the following advice to avoid commonly made errors:

- ensure you include the name of your organisation and that it's the same as the name shown in your constitution, the application form and your PTA's bank account
- ensure all the trustees have signed and dated the form and that the names and numbers of trustees match those entered in the online application form
- ensure the box regarding working with children and vulnerable beneficiaries is ticked if appropriate.

10.Declaration

If you're applying using the Parentkind model constitution with an income that falls under the £5,000 threshold, remember to highlight this in the special circumstances box.

Remember to attach all the necessary supporting documents, including your trustee declaration form.

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