



# The Ultimate PTA Guide to *Governance*

Best Practice for PTAs

Parentkind





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## Why it matters and what it involves

**Good governance is essential for running an effective PTA.** It provides the structure, policies and clarity needed to ensure your PTA operates smoothly and responsibly. Clear governance helps everyone – committee members, volunteers and the school – to understand their roles, responsibilities and the best practices to follow. All committee members are legally responsible for the PTA, so it's important everybody understands the role they play in running your PTA.

The key components of PTA governance include your constitution, committee structure, meetings, finances and charity registration. If your PTA becomes a registered charity, committee members become Trustees and are legally responsible for ensuring the charity is managed properly and complies with the law. Strong governance helps Trustees to meet their obligations and ensures your PTA can continue to support pupils with success and integrity.

**This guide takes you through every aspect of governing your PTA.** Whether you're a seasoned PTA Chair or a newcomer just starting to build your committee, our advice will set you on the path to success.





# How Parentkind can help

## PTA Community Team

This guide details the main points of PTA governance, but there may be times when you need additional support. Our experienced PTA Community Advisers are on hand to help you navigate PTA governance and much more.



Clare Jenner



Caroline Hayward



Donna Hill



Marie Chapman

## Contact details and services



**0300 123 5460** – Our phone lines are open Monday to Friday, 9am to 5pm. You can also leave a message on our answer machine out of hours or if we're experiencing high call volumes. A member of our team will call you back as soon as they can. Don't forget to leave your name, telephone number, membership number (if applicable) and a brief description of the reason for your call.



**info@parentkind.org** – Feel free to email us and our team will respond within three working days. To discuss starting a PTA, you can get in touch via **newptamembers@parentkind.org**



**www.parentkind.org** – Simple and easy to use, our website homepage has a chat function for you to contact us. This is staffed Monday to Friday, 9am to 5pm.



Book dedicated support – **parentkind.org/contact** – Whether you have a query, a conflict

involving multiple committee members or simply need to organise a time with us that is convenient for you, you can book a video or phone call with one of our Community Advisers.



**PTA Hangout by Parentkind** – Join our friendly online community of like-minded PTAs! You can seek advice from fellow PTAs, share your experiences and achievements, or @ us to answer your questions. Our offices are staffed Monday to Friday, 9am to 5pm.

## Community Engagement Executives

Alongside our expert Community Advisers, our dedicated Community Engagement Executives work hand-in-hand with PTAs, parents and schools across the West Midlands, North West, Yorkshire and the Humber, and Scotland to support your mission. Whether you're running a long-standing PTA, starting fresh or looking for new ways to engage families, they would be delighted to speak with you!



Amanda Gwilt  
West Midlands



Sarah Anyan  
Yorkshire and the Humber



Ruth May  
North West



Jo McMahon  
Scotland

Some of the ways our Community Engagement Executives can help include:

- Hosting local meet-ups and connecting you with other local PTAs
- Supporting smooth transitions in PTA leadership
- Hosting events and training (in person or online)
- Helping new PTAs get started and navigate their first year
- Sharing tools, resources and updates
- Advocating for parents and PTAs at a regional level

If you're interested in joining a free PTA meet-up or finding out more about how our Community Engagement Executives can support you, check out **their dedicated webpage to explore and book.**

Follow us on social media for all the up-to-date news



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**X**  
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If you're not a Parentkind member

You might have years of PTA experience under your belt, or be seeking advice on how to set up a new association – either way, we have the PTA experts to help guide you through the process!

Find out more by emailing **newptamembers@parentkind.org**, downloading our **How to Start a PTA Guide** and exploring **what PTA membership can offer you.**

Ready to join us? **Start your membership** today with just a few simple steps. If you pay your membership by Direct Debit, **you'll even receive a £10 discount!**







# Understanding your association type

At its core, a PTA is a group of volunteer parents and teachers who work together to make their school a better environment for children to learn. They fundraise through a wide range of fun and creative initiatives, events and much, much more.

We've used the term **PTA** throughout this guide, but the exact nature of your association is defined by its membership, which will be set out in your constitution.

For example, you may have a Parent's Association (PA) where parents, guardians and carers are involved, but not teachers. In a Parent Teacher Association (PTA), Parent Staff Association (PSA) or Home-School Association (HSA), teaching and non-teaching staff currently employed by the school can be involved alongside parents.

A 'Friends of...' group or Parent Teacher Friends Association (PTFA)

includes both parents and staff, as well as any person over the age of 18 wishing to offer appropriate support or help who has been accepted by the committee as a member. The committee will need to keep a list of 'Friends' with their details as they will need to be contacted and invited to any open or general meetings separately – they will not be automatically contacted like the parents and teachers.

Association type	Who can be a member			
	Parents	Legal guardians and carers	Teachers and school staff	Any community members over 18
Parent's Association (PA)	✓	✓	✗	✗
Parent Teacher Association (PTA)	✓	✓	✓	✗
Parent Staff Association (PSA)	✓	✓	✓	✗
Home-School Association (HSA)	✓	✓	✓	✗
Parent Teacher Friends Association (PTFA)	✓	✓	✓	✓
Friends of... [School name]	✓	✓	✓	✓

Whatever your association type, your charitable objectives and mission will be the same – to enrich the opportunities of pupils at your school.

# Why your PTA needs a constitution

The constitution is the key governing document that outlines the rules and procedures for managing your PTA. It ensures everyone understands how the PTA operates and helps support clear, consistent decision making.

**Adopting a constitution is best practice for all PTAs**, even if you're not registered as a charity. If you plan to register as a charity or open a PTA bank account, having a constitution in place is usually required. **It provides a clear framework that:**

- Defines your PTA's aims and powers
- Outlines membership and committee structure
- Sets rules for electing committee members
- Details requirements for AGMs and committee meetings

- Guides how meetings and management should be handled

Having a constitution protects your PTA by ensuring your systems are legal, fair and transparent, and it helps prevent and resolve potential disputes.

## Adopting a model constitution for your PTA

Creating a constitution from scratch can be complex, but **we've made things easier by offering two model constitutions for you to use**. These have been developed with input from charity law experts and approved by the Charity Commission for England and Wales,

and the Charity Commission in Northern Ireland (CCNI).

These model constitutions reflect current legal requirements and best practices. **The constitution should be adopted in its entirety without changes** and this will allow PTAs in England and Wales to qualify for fast-track charity registration. Any changes made will require approval and therefore affect your eligibility for fast-track registration with the Charity Commission for England and Wales. PTAs in Northern Ireland must follow a different process – you can find out more on [our charity registration webpage](#).



These model constitutions are copyrighted material and available only to PTAs who are Parentkind members. **Have questions about our model constitutions?** Simply get in touch with the **PTA Community Team**.



# PTA objectives



Once you have adopted your constitution, the next step is to set clear objectives for your PTA to aim for. A PTA's objectives define its purpose as a charity and should guide all of its activities. Setting clear, long-term objectives is part of good governance and helps everybody involved with the PTA understand what they are working towards.

## What are charitable objectives?

PTAs are considered charities because they act for the public benefit. Their charitable purpose is outlined in the 'objects clause' of their constitution or governing document. For example, if your PTA is using the Parentkind model constitution, it states the objectives are to advance the education of the 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 that support the school and advance the education of the pupils

## Developing your objectives

To meet the legal definition of a charitable purpose under the Charities Act 2011, your objectives must fall under the Act's list of charitable purposes and demonstrate a public benefit. Further guidance is available from the [Charity Commission for England and Wales](#) and the [Charity Commission for Northern Ireland](#).

## Deciding if objectives have been met

Elected PTA committee members are responsible for ensuring that any activity or spending supports the PTA's charitable objectives. Although they make the final decisions, it's important to consult members more broadly to gain support and transparency.



Spending on contentious or personal items (like thank-you gifts for teachers or committee members) is usually outside the scope of these objectives. Donors would expect their contributions to fund activities that directly benefit pupils' education rather than personal gifts. **You can find out more about how to manage spending in [PTA finances](#).**



## Aligning PTA activities with charitable objectives

PTA committee members must understand and plan activities that support the PTA's charitable objectives. We recommend working closely and communicating clearly with parents and the school to identify pupil needs and determine how the PTA can best support them. Activities can benefit the whole school or individual classes or year groups. However, the committee may wish to spread these benefits as equally as possible across the whole school. For example, you may support individual classes for different projects at different times over the course of a year, or you may support a specific project for a specific class every year, such as First Aid training for Year 6 or reception starter packs.

It's crucial to engage parents to hear their views and consult the school's improvement plan to align the PTA's efforts with the school's priorities. Gathering people's opinions and researching your options thoroughly will help the committee to make their final decision.



**PTA events can serve multiple purposes: while they may raise funds, they also help build community engagement, encourage parental involvement, strengthen school-business links and offer pupils experience in volunteering and charitable work.**



# PTA policies

Alongside your constitution and the charitable objectives defined within, it can be useful to adopt policies to give more structure to your PTA's activities. **These policies cannot change what is written in your constitution, but they can expand upon what is expected of members and what is considered best practice.** Policies should be checked annually by the committee and can be changed or updated at

a committee or general meeting. **We have a series of model policy templates you can find on our governance webpage.**

## Code of conduct

A code of conduct sets clear expectations for respectful and professional behaviour. All members – not just the committee – should follow it. Having a code of conduct

helps build a positive, inclusive community by promoting strong relationships between parents, pupils and staff. It also serves as a useful tool for managing and resolving any conflicts that may arise.

If you're unsure where to begin, you can use **our example code of conduct to get started** – it covers the essentials, and you can tailor it to suit your PTA's needs.

## Conflict of interest

A conflict of interest arises when a committee member's personal, financial or other interests could influence their ability to act in the best interests of the PTA. This applies to all committee members, including the Chair, Secretary, Treasurer and elected members, all of whom share equal, legal responsibility.

### An example of a conflict of interest

Your PTA is looking to hire a company to mend a school fence, as agreed with the school, and hires a committee member who runs a fencing firm to undertake the work, paid for by your PTA. This would create a conflict of interest for this committee member as they would benefit financially from it. That committee member cannot vote on appointing themselves to do work on behalf of your PTA.

**Having a conflict of interest isn't wrong, but it must be managed properly.** Any members involved should declare the conflict, remove themselves from related discussions and abstain from voting, which will ensure that any decisions made remain fair and impartial.

As part of good governance, your PTA should have a clear conflict of interest policy. Find out more about common PTA conflicts of interest, as well as how to identify and deal with them, **on our governance webpage**, where you'll also find **our model conflict of interest policy**.

## Handling difficult situations

There may be times when your PTA faces low parent or school support, internal disagreements or difficulties



You can find out more about resolving difficult situations **on our governance webpage**, or **contact one of our Community Advisers** who will be able to share their wealth of knowledge to help you through these challenging times.

filling key committee roles, leading to concerns about continuing your charitable work. The four main challenges that can threaten a PTA's future are:

- Limited parent involvement (even with an active committee)
- Difficulty recruiting officers

- Internal conflict
- Lack of school support

Identifying and resolving these issues quickly will help your PTA remain active and effective, and ensure you can continue to support your school.



# PTA committee members and Trustees

## Committee members

Your PTA committee is made up of a team of elected volunteers who are chosen at the Annual General Meeting (AGM) to manage the PTA on behalf of its members. They will normally serve for a year, unless your constitution states otherwise.

There are two types of committee members:

- **Officers:** Such as the Chair, Treasurer and Secretary – each Officer has a specific role
- **Ordinary Committee Members:** Support Officers and share general PTA responsibilities

Officer roles will often be filled by a single volunteer, but some PTAs will choose to have two, such as two Co-Chairs or two Co-Treasurers. Whether they are Officers or not, all committee members have equal voting rights except for the Chair, who has an extra casting vote in the event of a tie. For Co-Chair arrangements, one person should be agreed as Chair for each meeting and will have the deciding vote if necessary.

**Every PTA committee will be different, but we recommend having at least three elected committee members.** An odd number of members helps to avoid voting deadlocks, and we suggest having between three and ten members for manageable decision making. You should always check your constitution for any minimum requirements or voting rules.

Although they cannot vote, you may also want to involve wider members of your PTA community who are not part of the committee in open meetings. This helps encourage wider engagement, and these helpers may join the PTA committee in the future!



You can find out more about recruiting committee members [on our governance webpage](#), and use our [dedicated role cards](#) to help with recruitment.



Find more details about committee roles in the [dedicated section on page 14](#)

## PTA committee members as Charity Trustees

If your PTA is a registered charity, all elected committee members automatically become Trustees and are legally responsible for ensuring the charity is managed lawfully and properly. All Trustees share equal responsibility, and decisions must be made collectively – no one person should act alone on behalf of the committee. Most importantly, all committee members must be Trustees and all Trustees must be committee members – there should be no distinction between the two. If a committee member is not eligible to become a Trustee, they cannot serve as a committee member.

Each Trustee must sign a **Trustee Eligibility Declaration** (England and Wales) or a **Trustee Declaration** (Northern Ireland CCNI) confirming they are eligible to act as a Trustee for your PTA. Each form should be kept internally as records of your due diligence. The relevant Charity Commission must be notified of all Trustee appointments, updates and changes.

You can find out more information on the responsibilities of charity Trustees on [GOV.UK](#).

## Committee member roles

Your PTA committee includes Officers (typically Chair, Treasurer and Secretary) and Ordinary

Committee Members who may be assigned additional roles as needed (for example, Communications Officer or Pre-Loved Uniform Coordinator).

Co-opted members are appointed by the committee – not elected by members – to fill a specific role or bring in a needed skill. They serve until the next AGM, where they can be nominated for a committee role if applicable. Details of how to co-opt members will be in your constitution.



Illustrations by Flaticon



## Committee member roles

### **Chair/Vice-Chair**

The Chair is responsible for directing committee meetings, ensuring that everybody is involved and has their views heard. They make sure that all committee members are familiar with the PTA's constitution and policies, as well as their roles and responsibilities. They also hold a casting vote when there is a tie.

It's best practice to have a PTA Chair, but if the position is vacant, other committee members can take turns chairing meetings, which should be decided ahead of the meeting. A Vice-Chair is an optional

role who supports the Chair and steps in when they're absent or if the Chair role is vacant. The role of a Vice-Chair requires the same skills as the Chair. Some PTAs have Co-Chairs or Joint-Chairs who share responsibility and alternately lead meetings. One must be chosen to chair each meeting and hold the casting vote if needed.

#### **Main responsibilities of the Chair:**

- Preparing and setting the agenda for meetings
- Setting the ground rules for meetings
- Leading meetings, ensuring all voices are heard
- Ensuring committee

members understand their roles, responsibilities and the constitution

- Delegating tasks to other committee members and volunteers, checking they're completed and offering support where needed
- Holding the casting vote in a tie (usually deferring the decision to a future meeting to allow for further discussion)
- Ensuring any decisions are made correctly and fit the objectives of the PTA as set out in the constitution
- Writing the Chair's report for the AGM

### **Treasurer/Vice-Treasurer**

The Treasurer ensures proper management and recording of all the PTA's financial activities. While the committee collectively approves spending, the Treasurer is responsible for maintaining accurate records, following best practice for handling money and providing regular financial updates. They must also prepare end-of-year reports for the AGM and submit returns if the PTA is a registered charity. If you have Co-Treasurers, they share equal responsibility. A Vice-Treasurer supports the Treasurer and steps in if they are absent or the Treasurer

Role is vacant – both of these roles require the same skills as the Treasurer.

#### **Main responsibilities of the Treasurer:**

- Keeping accurate and up-to-date financial records
- Presenting financial updates at each committee meeting
- Managing the PTA bank account and holding the PTA cheque book/debit card
- Monitoring and managing online payment platforms
- Preparing floats
- Ensuring best practice procedures are followed for counting and banking

money, making payments and claiming expenses by all committee members

- Making any approved payments on the committee's behalf
- Managing Gift Aid (or assisting the committee member responsible)
- Preparing the annual Treasurer's report for the AGM and arranging an independent examination of the PTA's accounts
- If your PTA is registered as a charity, completing the relevant Charity Commission's annual return

### **Co-opted committee members**

Co-opted members are elected by the committee – not by PTA members – to either take over a role or because they have a particular skill to fill a specific role. They serve until the next AGM, where they can be nominated for a committee role if applicable. Details of how to co-opt members will be in your constitution.

### **Secretary**

The Secretary supports effective communication between the school community and the PTA, and maintains accurate records, including the minutes of all meetings held and details of decisions made. Having the Secretary in charge of communications can really strengthen your PTA's impact. If the

role is hard to fill with a single person, duties can be split between members as Co-Secretaries.

#### **Main responsibilities of the Secretary:**

- Preparing for meetings with the PTA Chair
- Taking minutes at meetings, recording attendance, action points, decisions and proposals

- Circulating approved minutes, along with a reminder of any actions agreed
- Maintaining PTA records
- Making sure the PTA is GDPR-compliant
- Updating Trustee details with relevant charity commission (as appropriate)
- Handling the PTA's correspondence

### **Ordinary Committee Members**

Although they may not have a named role like those above, Ordinary Committee Members are just as important to a well-run PTA committee. They have the same voting rights as Officers and help make decisions on behalf of the PTA. These roles provide a good introduction for those wanting

to be involved in the committee without holding Officer roles.

Depending on the needs of your PTA, Ordinary Committee Members can take on extra tasks, such as managing social media, supporting parent engagement or recruiting volunteers, and even be given titles such as Grants Manager, Preloved Uniform Coordinator or Social Media Manager. They can

help new parents get involved in school life or recruit existing parents to volunteer at events, maybe as a class representative.

However they support the PTA, Ordinary Committee Members share equal legal responsibility for the PTA's control, property and funds. If the PTA is a registered charity, they are also Trustees and may be bank signatories.

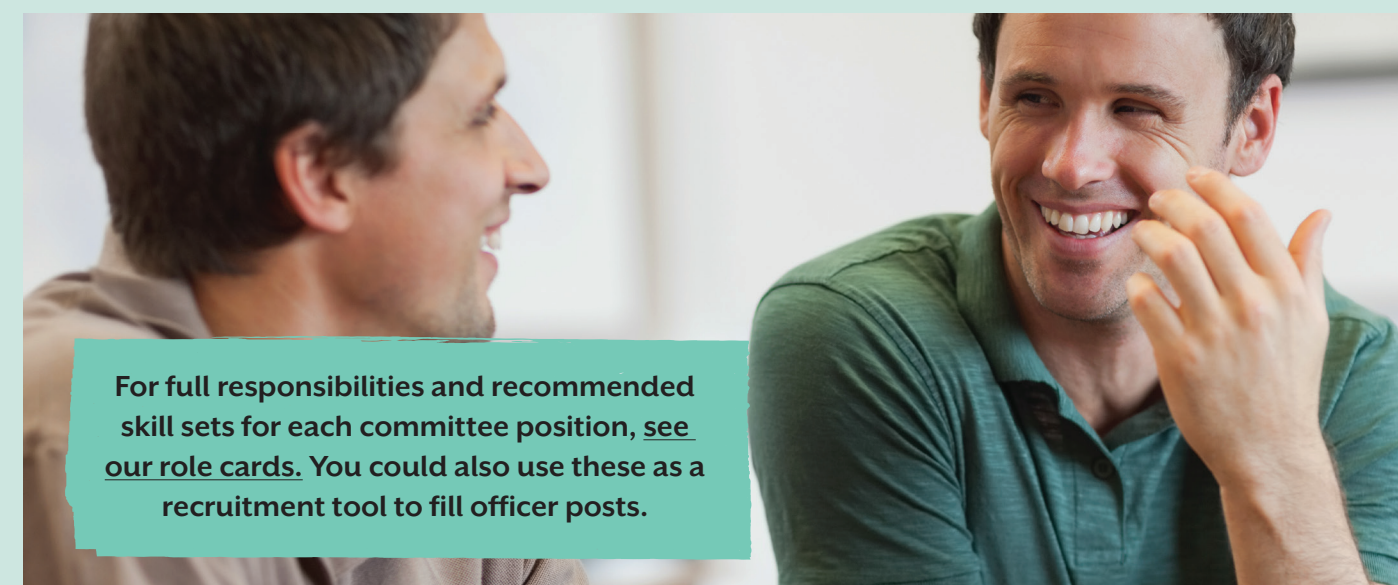
### **Sub-committees**

A sub-committee is a set of PTA volunteers who come together to complete a specific larger task – most often organising major events

such as Christmas or summer fairs. This helps to utilise your PTA's resources effectively.

Sub-committees must include at least one committee member who

reports back to the PTA committee. It should be noted that the PTA committee retains overall responsibility and final decision-making for all sub-committee activities.



**For full responsibilities and recommended skill sets for each committee position, see [our role cards](#). You could also use these as a recruitment tool to fill officer posts.**

Illustrations by Flaticon





## Committee handover

It is inevitable for committee members to stand down from time to time. There are many reasons why, but the most common is because their children leave the school or their term of office ends. Whatever their reasons are, **it's important to have a good handover from the outgoing committee members to the new committee members.**

If you don't provide a good handover, it can leave new arrivals wondering where to start. Consider the handover you had when you first joined and the handover you would

like to deliver when your term of office eventually comes to an end. If you haven't had a positive handover in the past, it may be because previous committees haven't followed best practices, so try to ensure this doesn't happen for the new members.

### Standing down from the PTA committee

It's best practice to remain on the committee until the next AGM, when all members officially stand down. If you're not standing for re-election,

here's what to do:

- **Recruit potential successor(s) to stand for election at the AGM:** Confirm who's leaving and help fill key roles – Chair, Treasurer and Secretary
- **Support the AGM:** Assist in organising the meeting if possible
- **Finalise accounts:** If the Treasurer is leaving, ensure accounts are up to date. Share contact details for any independent examiner
- Write a report for the AGM if required

### Essential items and documents to handover

#### ☐ Digital storage

Store important documents electronically – on portable hard drives, in cloud storage such as Google Drive and Dropbox, or both – ensuring GDPR compliance.

#### ☐ Access and passwords

Share all login details and passwords for services like the Charity Commission, easyfundraising, Gift Aid and any other platforms your PTA uses. We recommend the new committee changes the passwords of all accounts to ensure access is restricted to the new committee members. You should also advise new committee members on how to create their **Parentkind** login.

#### ☐ Constitution and model policies

- Governs how your PTA operates – include a current copy

#### ☐ Parentkind membership

- Assist the new committee members to access the Parentkind website to download the current insurance documents, certificate and receipt
- Insurance documents
- Includes insurance summary and confirmation from Marsh Commercial (available in your Parentkind account)

#### ☐ Bank details

- Bank name, account number and sort code
- Signatories and who holds banking materials
- Online banking access and payment platforms
- Instructions for updating signatories and passwords
- Remember to notify **HMRC** and Charity Commission if details change

#### ☐ Charity Commission information

- Your charity number and how to create a new individual login
- For unregistered PTAs in Northern Ireland, note whether your registration is pending

#### ☐ Gift Aid and HMRC

- Gift Aid declaration records and Small Donations Scheme information
- HMRC registration number, Government Gateway login and contact details
- Update **HMRC** information if necessary

#### ☐ Accounts

- Copies of annual accounts (covering the past six years, plus the current year)
- Details of any committed spending and guarantees on recent work

#### ☐ Meeting minutes and reports

- Minutes from the last AGM and past meetings
- Annual reports from the Chair and Treasurer

#### ☐ Licences

- Include any current event, lottery or film licences and details of how to renew/apply
- Update the licence provider with the new contact's details

#### ☐ Risk assessments

- Location of past risk assessments – ensure they are reviewed for future events





## Additional handover information

Once you've handed over the essential documents, details and resources, passing on your practical knowledge, experience and useful contacts will also help new committee members get off to a strong start!

### □ Planning and events

- **School calendar:** Suggest checking it early to avoid clashes with school-led events
- **Event history:** Share how you've organised events for your community, including details like quantities of food and drinks purchased, typical costs and pricing for activities or items
- **Templates:** Provide some examples of past newsletters, flyers and welcome letters for reference and reuse

### □ People and contacts

- **Regular helpers:** List names, contact details, skills and availability (ensuring **GDPR** compliance)
- **Event suppliers:** Provide contact details for DJs, caterers, prize wholesalers – anyone who has helped out in the past
- **Local supporters:** Provide contact details for donors, sponsors or regular contributors via standing orders
- **Match funding:** Provide details of PTA members with employer match funding schemes to boost fundraising



### □ Resources and equipment

- **PTA equipment:** Share the PTA's inventory, including what's owned or used, where it's stored and any shared-use agreements with the school
  - **Fundraising partners:** Provide information on useful suppliers, offers or ongoing initiatives
- ### □ Digital assets and communication
- **Passwords and access:** Ensure you've shared login details for the PTA's email address, website and social media.
  - **Responsibility:** Ensure a committee member is assigned as admin for digital accounts
  - **PTA assets:** Let the team know where images such as the PTA logo are saved for future use

Find out more details on having a happy handover on [our governance webpage](#).



# Committee meetings

Most PTA committees operate in a formal but relaxed manner, with a straightforward decision-making process based on votes. It's important to follow best practice and keep accurate records of all discussions and decisions made at meetings. There are three main types of meetings that your PTA should hold:

- General meetings
- Committee meetings
- Open PTA meetings

In addition, you may want to consider holding a welcome meeting to introduce your PTA, promote your work and recruit new members.

## General meetings

### Annual General Meeting (AGM)

A formal meeting held in line with your constitution every 12 months, with no more than 15 months between each AGM. The committee reports on the past year's activities and elects new members for the coming term.

### Extraordinary General Meeting (EGM)

An EGM is called by the committee to address urgent matters – such as amending the constitution – that can't wait until the next AGM. EGMs

follow the same process as AGMs, as outlined in your constitution.

Parentkind members can download [our editable AGM poster, invitations, agenda template and editable EGM poster](#) to help promote attendance.

## Committee meetings

Committee meetings are held regularly to manage the PTA's activities. Elected committee members attend to make key decisions such as planning events and approving spending. The minimum meeting requirements should be outlined in your constitution. If committees need to make decisions quickly, committee meetings can be held virtually – see our [virtual meetings section](#) to find out more.

## Open meetings

Open meetings are more informal, creating space for open discussion and helping the committee collect PTA members' opinions on future events and activities, how funds

should be spent and more. All members of the PTA should be invited to open meetings, and they should be held at accessible times and venues to ensure everybody has the chance to contribute.

Regular open meetings ensure the committee is acting in members' interests. It also helps encourage more volunteers to get involved. Once the committee has compiled the views and opinions of PTA members, they can then take this information into a closed committee meeting to make any final decisions. Some committees hold their committee meeting after an open meeting as all are already in attendance.

Find out more about attendees and voting for different meetings on [our PTA meetings webpage](#).



Illustration by Flatiron



Find out how your PTA can benefit from match funding on [our fundraising webpage](#).



## Welcome meetings

Welcome meetings help introduce your PTA to the wider parent community. They give you opportunities to showcase your PTA's work, support new parents as they settle in and encourage new volunteers to join you. It's a great time to get parents signed up to fundraising initiatives such as **easyfundraising** and **The Parents Lottery**, allowing parents who may not have time to volunteer an easy way to support your PTA.

These meetings can be especially valuable for parents during the first few weeks of term when they are often looking for guidance, reassurance and ways to get involved in school life. A well-run welcome meeting helps them feel supported, informed and valued, and far more likely to engage with and contribute to the PTA.

**For the perfect introduction, why not share our own Be School Ready resources – this beloved guide has helped thousands of parents and families settle into their new school!**

### Hosting a successful welcome meeting

- **Ask to speak:** Don't just serve refreshments, set up a speaking slot to explain the PTA's role, impact and achievements. Use visuals like display boards with photos of recent events
- **Be approachable:** Remember how it felt to be a new parent? Friendly faces help ease nerves and build connections
- **Everyone is already a member:** Remind all parents that they're



- automatically PTA members when they join the school, and their skills and experiences are valuable
- **Connection, not recruitment:** Introduce volunteer opportunities, but avoid pressuring anyone – it's best to offer support and present volunteering with the PTA as a two-way street
- **Be available for questions:** Start conversations and offer to follow up later if you can't give immediate answers
- **Share useful info:** Offer a helpful school checklist (such as uniforms, contacts) to reduce new parent stress
- **Gifts and freebies:** Branded items (like pens, keyrings, baked goods) help start conversations and leave a lasting impression
- **Stay in touch:**
  - Collect contact information (in line with GDPR). Use **our Support your PTA reply slip** to keep things simple!
  - Share social media and website links
  - Use a generic PTA email address

- Keep your online presence up to date before the event
- **Plan what's next:**
  - Set up a buddy system to connect new and existing parents or use Class Reps if you have them
  - Organise low-effort socials like a picnic or park walk
  - Send a follow-up newsletter using collected contacts (BCC email addresses)
  - Update Facebook with photos from the event (use generic images or get GDPR-compliant consent)
- **Invite skills and support:** As parents settle in, identify ways they can help based on their strengths (such as design or marketing)
- **Reflect and improve:** After the event, get feedback from PTA members, reflecting on what worked well and what to improve for next time



Illustrations by Flaticon

## Virtual meetings

**Virtual meetings are allowed if your constitution permits** and often have higher attendance since no venue or childcare is needed. These can be held on a group video platform such as Zoom or Microsoft Teams, via email or on social media platforms.

### Hosting a successful virtual meeting

- **Prepare well:** Know your chosen platform, provide clear joining instructions, and use passwords and waiting rooms for security. You could practice beforehand with committee members to help avoid technical issues
- **Use platforms with chat features:** This makes it easier for attendees to ask questions during the meeting
- **Be inclusive:** Ensure your meeting is accessible to all attendees, offering guidance if needed
- **Time well:** Allow extra time,

since virtual meetings tend to run slower than in-person

- **Wrap up:** Share minutes and documents promptly after the meeting. Consider recording sessions (with consent) to help finalise minutes



### Calling and running meetings

- **Meeting frequency:** Your constitution may specify this, but it's best practice to meet at least three times per school year, whether these are committee-only meetings or open to all members
- **Calling a meeting:** Meetings

are usually arranged by the PTA Secretary. Dates can be set at the end of a previous meeting or scheduled at the start of the year

- **Venue and timing:** Choose a convenient location and time for members. It doesn't have to be the school, but capacity should match expected attendance – and remember to choose an accessible venue to ensure everyone can attend
- **Encouraging attendance:** Give plenty of notice for open meetings. Consider organising childcare arrangements or family-friendly activities (like a film screening with an umbrella licence) to make attendance more convenient for busy parents



**For more information on running virtual meetings, check out our PTA Zoom meetings webpage.**

**Whether you hold an in-person or virtual meeting, access more details on how to prepare, ensure it runs smoothly and what needs to be done afterwards on our PTA meetings webpage.**



# PTA finances

Fundraising and spending responsibly are key parts of your PTA's mission, and following best practices will help to build trust and support from members, the school and wider community.

## The essentials

### Ownership and responsibilities

Legally, the PTA and the school are separate entities, so PTA funds belong to the PTA. Elected committee members are responsible for deciding how these funds are spent. **The school cannot control or dictate PTA spending**, include PTA funds in its budgets, or audit them alongside school finances.

### How funds are spent

PTA funds should be spent within a reasonable time and in ways that meet your charitable objectives and benefit your pupils. It is also acceptable to save funds over a longer period if they are allocated to a larger project. Decisions on how to spend PTA funds are the legal responsibility of the elected committee members. Although most PTAs work closely with their schools to ensure funds are used effectively, **the final say lies with the committee.**



### Working with the school

**Maintaining a good relationship with the school is key to the PTA's success.** If the school appears to be directing how funds are spent, aim to find a compromise – such as agreeing to contribute a portion of the funds to the school's projects while using the rest for other purposes.

In some cases, it may also be useful to consult the wider school community, including parents and pupils, and have suggestions reviewed by the school before the committee makes a final decision. This helps to ensure you won't be wasting your PTA funds and that the proposed items will be used to benefit the pupils' education.

A common method for deciding how to spend funds is using a wish list, where the school provides the



More information about VAT requirements for PTAs is available [on our VAT webpage](#).

## Financial governance

The Treasurer, with committee agreement, should put good financial practices in place to responsibly manage PTA funds. All elected committee members share responsibility for following these procedures and ensuring accurate, timely record-keeping.



### To ensure strong financial oversight:

- Review financial statements monthly and make financial reporting a regular agenda item
- At least quarterly, conduct a full financial review, verifying that all expenses and receipts match the balance sheet or accounting records
- Allow multiple committee members access to online bank statements and consider using paper statements for transparency
- Set clear, agreed-upon financial thresholds
- Ensure all members understand reporting procedures
- If your PTA is a registered charity, Trustees must prepare annual accounts and undergo independent examination for income exceeding £25,000. For best practice, incomes below £25,000 should still be independently examined



committee with a list of ideas for consideration. When selecting from the wish list, the committee must ensure all spending aligns with the PTA's charitable objectives outlined in its constitution. For example, funding classroom whiteboards clearly supports the goal of advancing education. In contrast, requests for funding building work may require a conversation to determine whether or not it meets the PTA's objectives. All spending decisions should be openly discussed and agreed upon by the committee.



Details on raising funds for other charities, suppliers, supplier insurance, payment terms and much more regarding the purchasing of

equipment can be found on our [PTA finances webpage](#).

## VAT on purchases

**PTAs are not VAT exempt and should pay VAT where required.**

PTAs can collaborate with schools to recover VAT on items the school needs, as VAT is paid at purchase.

**To reclaim VAT, the school must:**

- Place and receive the order
- Receive a VAT invoice addressed to them
- Pay the VAT-inclusive invoice
- Retain ownership of the items
- Keep clear records for HMRC

The PTA can donate the cost of the items without VAT, or another agreed amount to the school. However, the PTA cannot pay the invoice for the school or be invoiced by the school. Should this happen, the PTA will need to pay the VAT.



An independent examination can be carried out by someone who has the necessary skills and competency – they don't need to hold any formal qualifications. For example, a school bursar or business manager, a maths teacher, a parent who runs their own business or who has accountancy/book-keeping experience, or a Treasurer from a different PTA.

**An independent examination can't be carried out by another committee member or anyone related to a committee member.**



**Financial governance supporting policies**

The Treasurer and committee should work together to establish clear financial management rules to ensure everybody understands their roles and responsibilities. This helps to keep everyone on the same page and simplifies the Treasurer's duties. The committee may also choose to adopt a finance policy, outlining the PTA's financial procedures – you can get started with [our model template](#) available for Parentkind members.

You can find out more about financial management, accounting systems, receipts and payments, donations, cash floats and event takings on [our financial governance webpage](#).

**Financial reporting**

**PTAs should always follow good accounting practices.** This includes maintaining proper records for at least six years, preparing annual accounts and Trustees' reports, undergoing an audit or independent examination and making accounts publicly available on request.



If the PTA is registered as a charity in England and Wales, with income or expenditure under £1 million, they must also comply with the Charities Act 2006 and submit an annual return to the Charity Commission. Simple records like an analysed cashbook are often sufficient. Similar financial reporting guidance is available from the [Charity Commission for Northern Ireland](#).

You can find out more about how to prepare accounts, Trustee annual reports, whether you need an audit or independent examination, as well as Charity Commission reporting [on our financial reporting webpage](#).



**Bank accounts**

**PTA funds are separate from the school's funds, so the PTA must hold a separate bank account to manage their finances.** The account should be in the PTA's official name as stated in its constitution and, if the bank allows, it is best practice to have at least two signatories who are current elected committee members as they are legally responsible for the

PTA's funds. Only elected committee members should be PTA bank account signatories. Most banks require two signatories to approve payments or withdrawals, providing added security, but it's best practice to have at least four signatories to ensure coverage if someone is unavailable or steps down from the committee.



**If your signatory needs differ, you should have a robust financial control and expense policy in place detailing bank signatories. You can find our model policy and further details on our PTA bank account webpage.**

Most banks offer a choice of accounts, and some will offer charity or community current accounts. The types of accounts accessible to your PTA will depend on factors such as your charity registration status. To help determine what type of bank account is right for your PTA, UK Finance have created the [Voluntary Organisation Banking Guide](#).

If the bank you choose has a monthly administration charge on the account, this is considered a legitimate PTA expense.



**Suspected misuse of PTA funds**

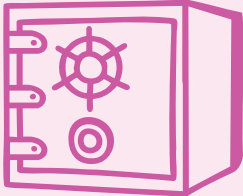
If you suspect a PTA committee member is misusing funds – such as accessing the PTA bank account improperly or making unauthorised withdrawals – **you must act quickly**, but with sensitivity and discretion. Warning signs may include:

- Financial pressure
- Personal difficulties
- Struggling with their role

- Not repaying borrowed funds
- Failing to hand over financial items like chequebooks or bank statements
- Not updating bank signatories as required

Prompt, tactful action is essential to protect the PTA and address any underlying issues. Any discussions between relevant committee members should remain confidential. To support you in such situations, you can

follow the guidance [available on our finances webpage](#), and reach out to our friendly PTA Community Advisers who are on hand to assist Parentkind members.







# Charity registration

Many PTAs qualify for charity registration and can go through the process for free. Registering your PTA as a charity gives it formal recognition, builds credibility and reinforces professional standards. It also establishes clear rules for operating your PTA.

## Other benefits include:

- Making your PTA eligible to receive charitable donations from local and national companies
- Making your PTA eligible to receive donations through Payroll Giving and Company Matched Giving schemes
- Giving your PTA access to apply for grants from charitable trusts (most require registered charity status)

## England and Wales

**In England and Wales, organisations with exclusively charitable purposes and an annual income over £5,000 must legally register with the Charity Commission – this includes PTAs.** The Charity Commission for England and Wales also allows Parentkind member PTAs with incomes under £5,000 to register as charities – provided that they have adopted the Parentkind model constitution without any alterations. This applies only to first-time registrations and not to PTAs that have been previously de-registered.

You can find out more about how to apply for charity status, the Charity Commission's FAQs as well as our

model constitution on [our charity registration webpage](#).

As a registered charity, you will also need to complete an annual return within ten months of the end of your financial year and update the Charity Commission with changes and new details of your Trustees. Find the full information of what documents you need to submit and what information is required on [our Charity Commission annual return webpage](#).

If you're already a Parentkind member and are curious about charity registration, [you can book a one-to-one appointment with our PTA Community Advisers](#) to learn more.



## Northern Ireland

**In Northern Ireland, all PTAs must register as a charity regardless of size, income or HMRC tax status. Failure to register could lead to High Court action against committee members.** It's the committee's responsibility to ensure that the Charity Commission for Northern Ireland has your PTA's contact details for registration as the Commission calls organizations forward in batches.

The Charity Commission for Northern Ireland has designated Parentkind as a 'Helper Group' and [they advise all PTAs to contact Parentkind](#) for guidance on registering using the approved common governing document.

More information on how to apply for charity status in Northern Ireland, access to our step-by-step guide for charity registration in Northern Ireland, our pre-approved public benefit statement and our Northern Ireland model constitution are all available on [our charity registration webpage](#).

As a registered charity, you will need to complete an annual report to submit to the Charity Commission for Northern Ireland. Find more details about how to complete your Trustees' annual report, public benefit reporting and independent examination on [our Charity Commission annual return webpage](#).

## Reporting serious incidents to the Charity Commission (applies to England, Wales and Northern Ireland)

Charity Commissions in England, Wales and Northern Ireland require charity Trustees to promptly report serious incidents and manage them responsibly. A serious incident involves actual or alleged events that cause or risk significant financial loss, damage to property, harm to beneficiaries or reputational damage. Common examples in PTAs include fraud, theft and major financial losses, but serious incidents

can also involve criminal or illegal activity. Trustees must act quickly, report incidents to the relevant authorities and explain how the issue is being managed to protect the PTA and maintain public trust.

Detailed advice on recognising when to report a serious incident and how to report them is available on [our reporting serious incidents webpage](#).





# Insurance

Many PTAs believe they are covered by the same insurance as their school – but this is not often the case! And if they are part of an academies trust, they are unlikely be covered under their Risk Protection Arrangement (RPA). This is just one of the reasons why it's so important for PTAs to have their own insurance in place. **Further reasons include:**

## 1 The constitution:

There may be a clause within your constitution stating that the committee should ensure there is adequate insurance in place.

## 2 Liability protection:

PTAs often organise events and activities that involve large numbers of people, such as fairs, sports days and fundraising events. Insurance protects the PTA against potential claims for injury or property damage that may occur during these activities.

## 3 Legal requirements:

In some cases, having insurance is a legal requirement for running certain activities – especially if the PTA is working with children or hosting public events. It helps ensure that the PTA is complying with any necessary regulations.

## 4 Financial security:

Accidents or incidents at events can lead to significant costs, such as medical bills, legal fees or compensation claims. Without insurance, these costs could fall on the committee members personally, putting the PTA's finances and volunteers at risk.

## 5 Trust and reputation:

Insurance helps build trust within the school community. Parents, teachers and sponsors are more likely to support and volunteer for PTAs that are properly insured because it shows the PTA is responsible and takes safety seriously.

## 6 Protects volunteers:

PTA volunteers are not usually covered by the school's insurance. Having volunteer-specific insurance ensures they are protected while carrying out PTA duties, such as helping at events or handling money.

## 7 Event coverage:

Insurance can cover a range of circumstances, including personal injury, damage to third-party property or loss of funds. This is particularly useful for fundraising events where large sums of money may be involved.

## 8 Peace of mind:

Having the appropriate insurance in place allows PTA members to focus on organising activities without worrying about potential risks or accidents. It provides peace of mind that they are protected from unforeseen circumstances.



**Insurance is essential for safeguarding the PTA's financial and legal position, ensuring the safety of volunteers and participants, and maintaining trust within the school community.**

Our PTA membership package comes with insurance managed by Marsh Commercial\*. If you are already a Parentkind member PTA, you can see the policy summary and associated policy documents, declaration forms and risk assessment template [on our insurance documents webpage](#).

\*Marsh Commercial is a trading name of Marsh Ltd. Marsh Ltd is authorised and regulated by the Financial Conduct Authority for General Insurance Distribution and Credit Broking (Firm Reference No. 307511). Not all products and services are regulated by the FCA. Copyright © 2025 Marsh Ltd. Registered in England and Wales Number 1507274, Registered office: 1 Tower Place West, Tower Place, London EC3R 5BU.



## Third-party vendors

**If you are using the services of a commercial company, such as an external catering service, a commercial stallholder or a children's entertainer, they must have their own public liability cover in place.** Your local authority will be able to tell you what level of public liability insurance they require third parties to have. As there will be a minimum level, we recommend you check with the local authority to understand their requirements. Commercial companies should then meet this requirement, and you

should ask to see proof of this before contracting them for any event(s). You should also check whether your third-party vendors are professional vendors or hobbyists and check the requirements of your PTA's insurance policy.

Third-party vendors should also have their own risk assessment and food hygiene rating (if applicable) and may hold certificates for the safety of their equipment or their activity (such as inflatables and fairground rides). You may wish to check if these are in place before choosing your vendor.

To ensure you're meeting all your requirements, you can use our third-party declaration and booking form every time you engage a third-party contractor or entertainer, which is available [on our insurance requirements webpage](#).





# Licences

Some events or activities will require a licence and, like insurance, PTAs are not necessarily covered by any licences the school holds. So whether you are running a raffle or lottery, serving alcohol or hosting entertainment like a concert or film night, don't forget to check you have the required licence(s) in place.

## Alcohol

### England and Wales

Adding alcohol to an event is often a good way to raise additional funds, but your PTA will need a Temporary Event Notice (TEN) to supply alcohol. **Do not attempt to work around this legal requirement.** It is illegal to include a glass of wine in the ticket price or by not charging for alcohol and asking for donations. If you have alcoholic raffle prizes and tickets sold in advance, you will also need a TEN.



**Failure to have a TEN for an event can lead to prosecution, resulting in a fine, a prison sentence of up to six months, or both.**

**Applying for a TEN is quite straightforward:**

- Apply for a TEN through your local council
- You will need a TEN for each event you hold on the same premises
- You can apply for up to five TENS a year
- If you're organising separate but consecutive events, there must be at least a 24-hour gap between them (for example, if you are intending to serve alcohol at a summer fair and then at a film night for parents, they cannot be held on consecutive days)
- There is a fee of £21 for each TEN
- You can only apply for a TEN as an individual and not an organisation
- You must apply at least ten clear working days before your event. This does not include the day your council receives your application or the day of the event

- The event must have fewer than 500 people at all times, including staff running the event
- You must send a copy of the TEN to the police and environmental health at least ten working days before the event. Your council will contact the police and environmental health for you where the application is made online

We recommend that you always check licence requirements with your local authority. They can also offer tips and guidance. Further information on TENS in England and Wales can be found [on our licences webpage](#).



### Northern Ireland

Under the Licensing (Northern Ireland) Order 1996, it is necessary for premises to be licensed to sell alcohol. The event must be of a sociable, charitable or benevolent nature and the sale of alcohol must not be the main purpose of the event. **Failure to have an appropriate licence in place can result in a fine, a prison sentence of up to six months, or both.**

Further information on alcohol licensing in Northern Ireland can be found [on our licences webpage](#).

The licensing system in Northern Ireland is not integrated and **you will need to apply separately for an Entertainment Licence.**



## Raffles and lotteries

If you intend to sell raffle tickets in advance of your event and announce the winners on the day, or if the raffle is your main event, you will need a small society licence. You can register with your local authority, for which there is a small charge. It is effective immediately once registered, but must be renewed annually – no tickets can be sold until your PTA is registered. Children under 16 years of age cannot buy or sell raffle tickets. We would therefore recommend that if you want to send tickets home to parents or guardians via the child's book bags, they are put in a sealed envelope addressed to the parent or guardian. If you are selling cloakroom tickets at the event only, this is an incidental raffle and does not require a licence.

Parentkind members can find out more about licencing requirements in [our dedicated Ultimate PTA Guide to Raffles & Lotteries](#).

**Parentkind members receive a 20% discount on printed raffle tickets through our partner RaffleTickets4U! Find out more on our partner webpage.**

## Music

Under the Copyright, Designs and Patents Act 1988, you need permission from the music's creator to play (via radio, CD player or any other pre-recorded systems) or perform music in public. This applies to all events in school where copyrighted music is used in schools for non-curricular activities.

**TheMusicLicence** (formally PPL PRS) covers non-curricular school events where all profit and benefit go entirely to the school. This also includes PTA events. Any other events that cannot reasonably be considered part of school activities would have to be licensed under a commercial form of music licence.

A Temporary Event Notice (TEN) does not permit the use of copyrighted music. **You may need both TheMusicLicence and a TEN for your event.** Please check with your local authority licensing team for clarification. Please note TheMusicLicence in no way provides permission to hold an event. This has to be gained through obtaining the correct form of licence – whether or not a licence to permit an event is required does not affect the need for a licence.

## Film

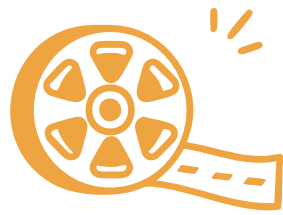
While you can show legally rented or purchased DVDs, either from your personal collection or those rented or purchased from a retailer, and give unlimited showings of that film, you will require a licence. This gives you permission from the owner of the copyright of the film to show it. Film licences can be acquired from companies like **MPLC** and **Filmbankmedia**. **You will also require a separate music licence for the soundtrack of the film, as detailed above.**



PTA film nights are not covered by your school's film licence, and showing a film without a film licence may subject your PTA to substantial fines and penalties of up to £5,000, up to six months' imprisonment, or both.

Temporary Event Notices (TENs) are required for the short-term provision of alcohol and public entertainment. A PTA event requires a TEN when it involves regulated entertainment, which includes showing films. There are some exceptions and we would advise you contact your local authority to find out more. If a wider public audience is not invited, any charges are made to a private audience (like family and friends), and the charge is made only to cover costs and not to make a profit, then a TEN would not be required. However, a film licence would still be required.

Parentkind members can find out more about film licencing in **our dedicated Ultimate PTA Guide to Film Nights.**



**Parentkind members receive a 25% discount on a MPLC film licence! Find out more on our partner webpage.**

## Fireworks

### England and Wales

If you decide to hold a firework display, it is a good idea to speak to your local authority to find out any specific requirements. For all firework events, **you will need to:**

- Review your insurance cover and speak to your provider about any stipulations
- Have permission to use a suitable outdoor space
- Assess your space – fireworks and bonfires have to be at least 100 metres away from any buildings, including school buildings
- Ensure the viewing area is at least 25 meters away from the firework area
- Let locals know that you are holding a fireworks display, on what date and at what time
- Speak to the police and fire brigade a minimum of seven days before your event
- Have the required number of First Aiders – we suggest you speak to St Johns Ambulance well in advance of your event to provide First Aiders
- Have at least one steward for every 250 spectators
- Complete a risk assessment for your event

**If you are buying and lighting the fireworks yourself,** ensure that your fireworks are sourced from a reputable company and follow all instructions to the letter. You must also appoint a fully-trained health and safety officer for the event



### Northern Ireland

If you are a PTA in Northern Ireland and are planning a fireworks display, it's important to note that **you must have a valid licence to buy, possess and use fireworks.** This licence is issued by the Department for Justice in Northern Ireland and there is an online application form to complete. The form you need to use will depend on what type of fireworks event you are planning to have.

**Consider the below factors when planning your event:**

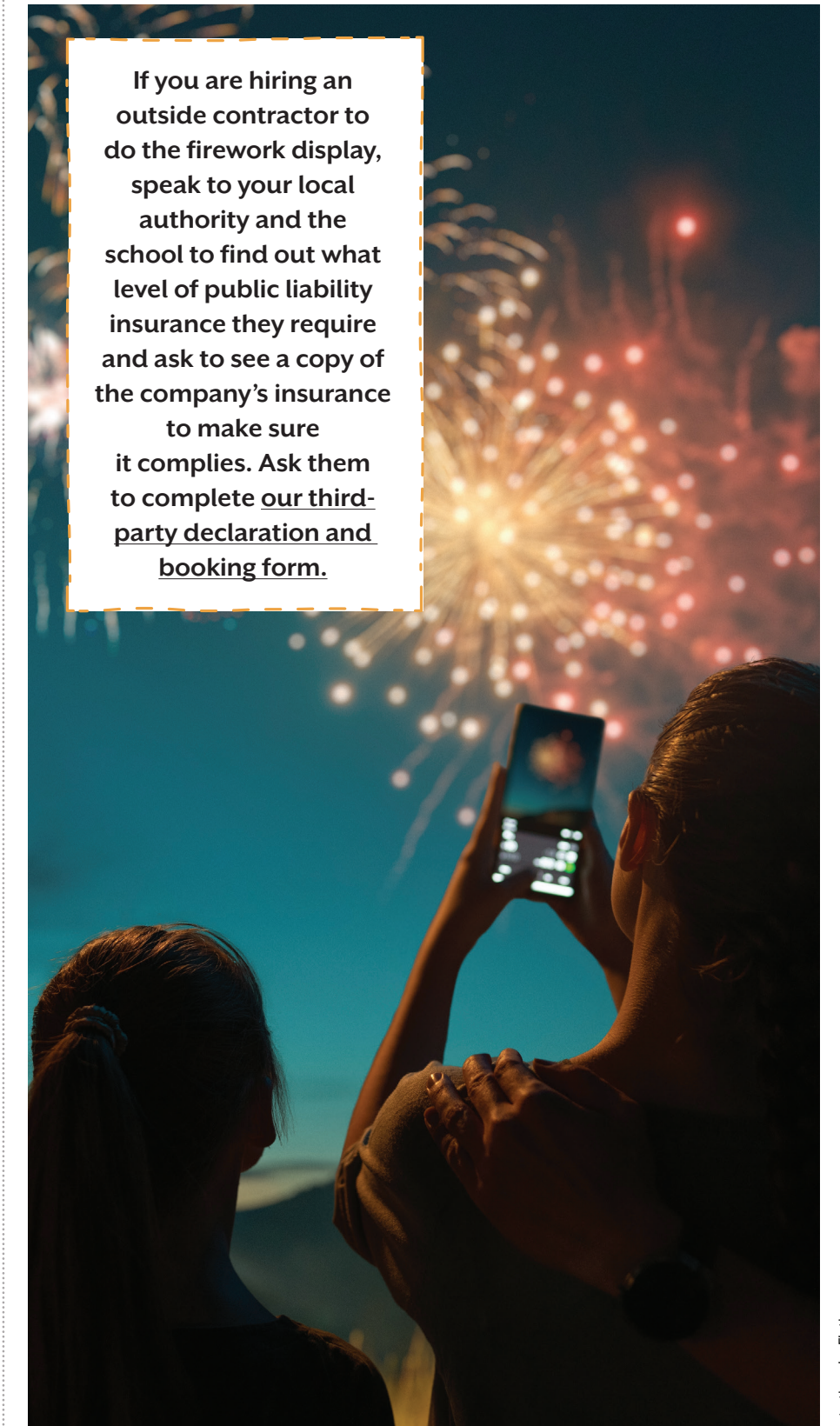
- All indoor fireworks and sparklers are exempt – although sparklers cannot be used by children under five and the packaging must state this
- There are two types of licence – one for garden-based fireworks and the other for display type fireworks
- Your licence will need to be shown to the retailer upon purchasing and all details on firework packaging must be written in English
- No fireworks can be set off in the street or any public place unless it is an organised, licensed public display
- It is illegal to sell fireworks at markets, car boot sales and vans (including ice cream vans)
- Indoor fireworks cannot be sold to under 16s and outdoor fireworks cannot be sold to under 18s

- All fireworks must be CE marked
- There is a list of approved retailers in Northern Ireland and another list detailing which type of fireworks are illegal and cannot be used
- Bonfires are not illegal, but it is worth bearing in mind that local authorities have various powers

to extinguish fires if they may cause health and environmental issues

Further guidance around firework displays in Northern Ireland, as well as the relevant application form and a helpline number, are available **on the NI Direct Government website.**

**If you are hiring an outside contractor to do the firework display, speak to your local authority and the school to find out what level of public liability insurance they require and ask to see a copy of the company's insurance to make sure it complies. Ask them to complete our third-party declaration and booking form.**





# Inclusivity and diversity

**Inclusivity and diversity are vital for PTAs because they help ensure all families, regardless of background, culture, language, health conditions or special educational needs and disabilities (SEND/ALN) feel welcomed, respected and able to participate.**

A PTA that reflects the diversity of its school community builds stronger parent relationships and encourages broader involvement, leading to better support for both the PTA and school.

To promote inclusivity, PTAs should consider accessible venues and times for meetings and events, offer translated or simplified communications where needed and plan activities that

respect cultural, dietary and religious differences.

It's also important to consider the needs of children and families with SEND/ALN or health conditions when organising events, ensuring spaces are accessible and activities are inclusive. Encouraging a range of voices in decision making helps create a PTA that works for all families, fostering a stronger and more cohesive community.

**Not considering inclusivity and diversity could lead to:**

- **Complaints and grievances** from parents or carers who feel they or their child(ren) have been excluded or underrepresented
- **Misunderstandings or conflict** that can arise from a lack of cultural awareness or sensitivity
- **Unconscious bias or discrimination**, which can lead to strained relationships and mistrust within the school community

- **Violation of equalities legislation**, such as the Equality Act 2010, which protects against discrimination based on protected characteristics like race, religion, disability, gender or age
- **Exclusion of pupils with SEND/ALN or health needs**, which can create inequality and reputational damage
- **Barriers to engagement**, leading to poor volunteer recruitment, limited event participation and reduced fundraising success

It is best practice for your PTA to have an inclusion and diversity policy that the whole committee can refer to when organising events and activities to ensure your PTA doesn't encounter any potential problems – find out more [on our constitution and model policies webpage](#).

