

Sir Thomas Rich's School Parents' Association

Code of conduct policy

This Code of conduct policy provides clear guidelines relating to behaviour, ensuring all members behave in a professional manner and everyone is treated with respect. It sits alongside our Constitution and Role statements and supports our charitable objectives.

1. Introduction

The purpose of our Code of conduct is to:

- ensure all representatives (committee members, volunteers and trustees) of the PA behave in a way which reflects well on the PA and the school
- ensure everyone is treated with respect at all times
- apply to all interactions - face-to-face, email, social media etc.

2. Commitments

The behaviour expected of all PA representatives is set out below. Individual rights and responsibilities are also outlined:

- Treat others with dignity and respect
- Be inclusive and reflective of the school community. Treat everyone equally regardless of gender or sexuality
- Do not spread negative hearsay nor critical comments to other parents. Express all opinions and ideas in a constructive and honest manner
- All representatives are responsible for their own actions and behaviour and should avoid any conduct which would lead any reasonable person to question their motivation and intentions
- Be transparent, honest and open
- Pay regard to other member's views, feedback or suggestions, constructively considering all ideas
- Demonstrate fairness and do not expect, or seek preferential treatment or financial/material benefit as a consequence of PA involvement
- Be a good example and promote volunteering as a positive way to contribute to the school and the education of the students
- Respect confidentiality
- When representing the PA, dress should be appropriate for the event or activity any representative is involved in
- Follow the agreed procedures for handling funds
- Follow the rules of the PA Constitution
- Committee members will accept their share of collective responsibility for decisions made, even if a decision is at odds with their own vote

3. Complaints

All members are entitled to raise concerns about safety or an individual's behaviour in relation to PA activities. In the first instance, any complaint should be addressed in writing to one of the four elected roles of the PA committee (Chair, Deputy Chair, Treasurer or Secretary) who will discuss your concerns with the other elected roles and jointly decide whether the complaint should be considered further by a sub group of the PA committee. If the complaint is made against one of the four elected officers, the remaining three will review the facts and consider whether to refer the discussion to a sub group of the committee. If a sub group is set up, it must include at least

3. Complaints (continued)

two elected officers and two other members of the PA committee. Decisions must be made in line with the Constitution. All complaints/concerns will be treated in confidence and a right of reply will be given before any action is taken.

Following a thorough investigation of the complaint, at the discretion of the elected trustees & depending on the severity of the breach of the code of conduct, sanctions may be imposed. These sanctions could vary from a warning to a request for the volunteer to stand down from their position with immediate effect.

This policy was approved on 9 October 2018 and is to be reviewed every year at the AGM

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Financial reporting and managing funds policy

This policy provides clear guidelines relating to financial reporting and managing funds, ensuring all members know what is expected. It sits alongside our constitution and role statements and supports our charitable objectives.

The accounting framework for charities in England and Wales is determined by the Charities Act 2006. STRS PA is a registered charity with a gross income between £25,000 and £500,000 and therefore must:

- maintain proper accounting records and keep them, together with the annual accounts, for a minimum of six years
- prepare annual accounts
- prepare a trustees' annual report
- arrange for an independent examination of accounts to be carried out
- make the accounts available to the public on written request
- complete an annual return to the Charity Commission

The PA is not required to maintain complicated accounting records. A record of receipts and payments must be maintained and analysed under various headings, e.g. postage, stationery, refreshments. All requests for repayment of monies paid out by individual parents must be made after submission of receipts. The PA bank account need dual signatures for all payments made. The card payment facilities are overseen by the Treasurer who also ensures that the pay-outs from the card payment provider equal the PA's records of card payments received.

Preparation of Accounts

The annual accounts are a set of financial statements showing the financial position of our association at the end of the financial year and its activities during the year. All monthly accounts for all activities of the PA must be reported to the next PA Committee meeting by the Treasurer.

The records should be kept up to date and always contain sufficient information to enable the committee to obtain a reasonably accurate picture of the PA's financial position at any time, not just at the end of the financial year.

Uniform shop financial reporting

The Uniform shop coordinator (or a nominated representative) will regularly report to the PA Treasurer, supplying all information required on receipts, expenditure and orders required. If a cashier is available during shop openings, this must be to receive monies only, so as to separate sales invoice recording from processing payments received, thereby ensuring clear segregation of duties. The cashier must keep a record of payments received, invoice number and payment method to enable the Treasurer to perform a reconciliation of invoices/refunds issued to monies received. If a cashier is not available, this reconciliation must be performed by the Uniform shop Co-ordinator or designated volunteer.

Handling and banking PA monies

The Treasurer will arrange for the relevant floats to be made available for all PA activities and unless away on holiday or unwell, will perform the banking of all cash and cheques. During a shop opening or fundraising activity, PA monies must never be left unattended (in line with our insurance requirements) and any monies taken home by a volunteer must be passed to the Treasurer promptly who must make every reasonable effort to bank the monies as soon as possible. This is particularly important after Year 7 and Year 12 uniform handout days, when the level of cash being handled will most likely be in excess of the amount insured in our volunteers' homes.

Trustee Annual Report and Independent examination

The PA must present annual accounts together with a brief summary of the main activities and achievements of the PA during the year at our annual AGM.

The PA will ensure that an annual independent examination is carried out and the outcome is reported at the AGM.

PA accounts are available via the Charity Commission. More detailed year end accounts are also uploaded onto the PA section of the school's website. If any member requests access to the accounts, this request must be made in writing to the PA Committee. A reasonable charge may be made for this, to cover copying and postage for example, but any such request will be met within two months.

An Annual Return must be completed and sent to the Charity Commission with the Trustee's Annual Report and set of accounts, each year. These documents must be submitted no later than ten months after the end of the charity's financial year end.

This policy was approved on 9 October 2018 and is to be reviewed every year at the AGM