

OLD DALBY CofE PRIMARY SCHOOL PTA

POLICY – MAKING DONATIONS TO OLD DALBY CofE PRIMARY SCHOOL

Old Dalby CofE Primary School PTA believe that most of the money raised through their annual fundraising should be passed onto Old Dalby Cof E Primary School.

This money should be spent in accordance with Old Dalby CofE Primary School PTA's charitable objectives found in their Charity's Constitution:

To raise funds for Old Dalby Church of England Primary School which are used to support the school and its pupils by funding activities, facilities or equipment which are not funded by the Education Skills Agency.

Old Dalby CofE Primary School PTA also believe that Old Dalby CofE Primary School should not have to ask the PTA for permission every time it would like to spend the funds donated.

One of the PTA's trustee's is the Head of Old Dalby Primary School and is fully aware of our charitable objectives.

The PTA will donate a lump sum at the start of each School year. The amount donated each year will vary dependant on the total raised by the PTA during the previous year. The PTA will donate a maximum of 75% of the total balance held in the PTA current account. The PTA requires a reserve to cover their operating costs and costs of running events. The school can always request a 'top up' during the year if required. This will only be paid on agreement of PTA trustees.

By operating this way, the Head of Old Dalby School knows what their PTA donation budget is for that year and can plan to spend it as the School deems fit – taking into consideration the PTA's charitable objectives.

Some items to be purchased will quite clearly fit the Charity's charitable objectives. These items fall into the general category of anything where the school or the children attending the school will benefit. A list of such activities is:

- School trips
- Visits to school by theatre companies/authors/dance companies
- Year 6 Leavers' 'treats' such as hoodies or celebration picnic
- Improvements to the school environment e.g., themed garden, display cabinets, wall friezes/posters, furniture
- Seasonal treats such as Easter eggs and Christmas themed craft projects
- Assistance with purchasing school uniform and other school related items if any child is adversely impacted by extreme and exceptional circumstances outside the control of their family

The Head has the authority to purchase these things without seeking prior approval from the PTA trustees.

Other proposed purchases may not, on the face of it, fit so clearly with the charitable objectives. Proposals for these purchases must follow the process outlined below in this document.

The Head of Old Dalby Primary School will complete a School Purchase Request Form which will be sent to the charity trustees for approval. The form must contain details of the proposed item, its cost and an explanation of how its purchase will meet the charitable objectives. Example below [Purchase request form](#)

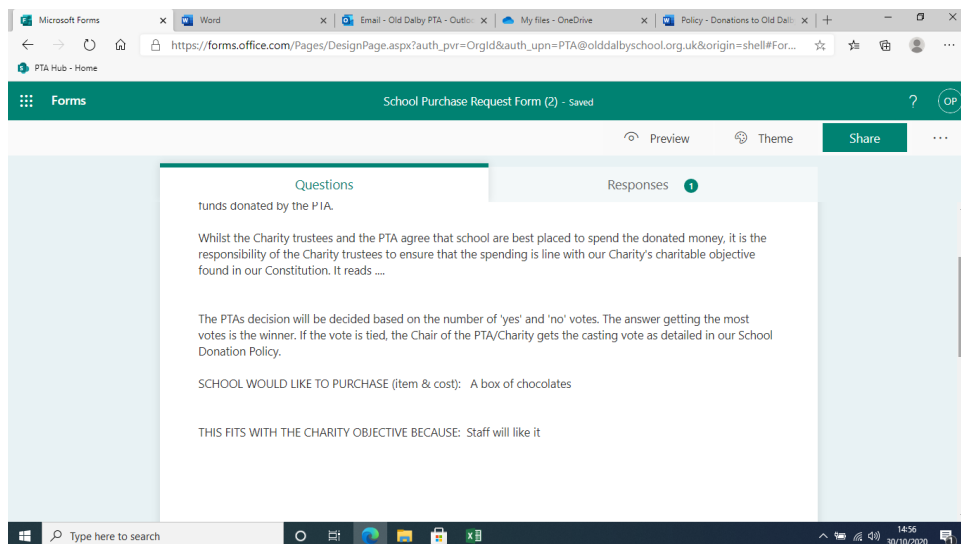
The Charity trustees will consider how the proposed purchase fits with the Charity's charitable objectives and will confirm agreement or not to the purchase. The target turnaround time for a decision is 2 working days.

The PTA's decision will be decided based on the number of 'yes', 'no' and 'maybe' votes. A 'maybe' vote indicates that further information is required from School to enable a 'yes'/'no' decision to be made. The 'yes'/'no' answer getting the most votes is the winner. If the vote is tied, the Chair of the PTA/Charity gets the casting vote.

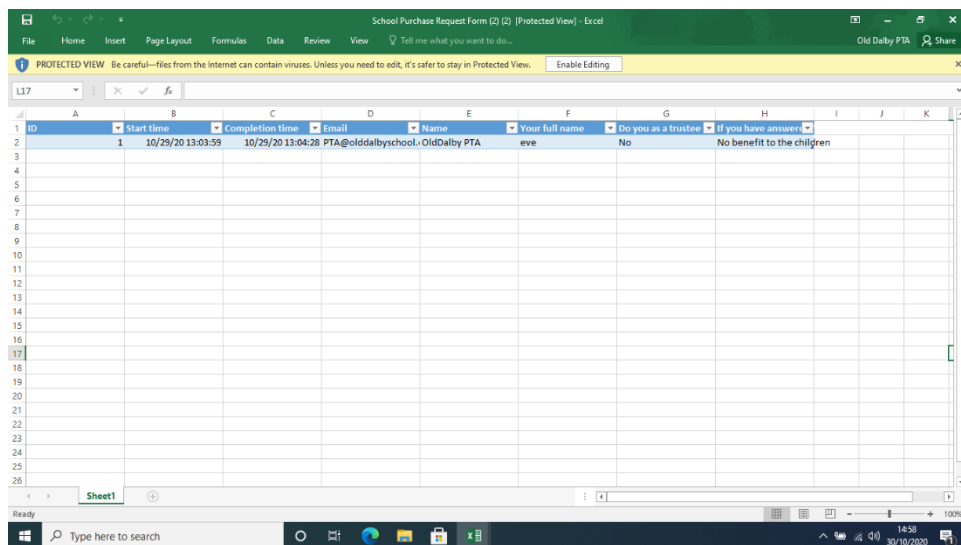
If a 'no' decision is made, further discussion regarding the proposed purchase may be arranged between the Head and charity trustees so that the trustees can better understand why the Head believes that the purchase would fit with the Charity's charitable objectives.

For PTA records, at the end of each School year, the Head of Old Dalby School should provide the PTA with a full breakdown of what the donation for that year has been spent on.

By using MS Forms – a form can be created for each purchase. It will be saved as School Purchase Request Form, School Purchase Request Form (2) etc. Each form will have details of the proposed purchase.



The responses for each form will be collated in an excel spreadsheet. and saved in the Charity folder on SharePoint.



Both documents will be saved as PDF files and saved in the Charity folder on Old Dalby Primary School's - PTA hub - SharePoint site.