

Parentkind

Bringing together home & school

How to have a happy handover

Some of the most frequently asked questions on our advice line are:

- Are we members of Parentkind?
- Do we have insurance?
- Where do we find a copy of our constitution?

While many PTAs are able to plan for a handover period, it's not unusual for a whole committee to stand down because their children have left the school, leaving new committee members wondering where to start.

So to make it as easy as possible for new committee members to know where to find things and who to inform of committee member changes, we've put together a handy list of all the essential information you need for your association to run smoothly. We've included additional information to gather that will make your life easier and if you are reading this as a new committee member, things 'to do' when it's your turn to pass on the PTA baton.

The essentials

Ideally it's a good idea to keep these essentials in an electronic format. An encrypted and password protected USB handover stick or a file sharing website would be ideal. But don't underestimate how reassuring it might be for your successor to hold a folder in their hands containing all those essential documents and lists!

Essential items to handover	What is it?
Constitution	The constitution is your association's governing document. You may have adopted the Parentkind model constitution. You can download a copy of it from our Constitution infosheet.
Parentkind membership certificate & receipt	This shows you are members of Parentkind and includes your membership number. Your membership receipt and certificate are stored in the My account area of our website.

	<p>Before you leave the PTA, call our member support line on 0300 123 5460 or email info@parentkind.org.uk with the name, email address and phone number of the new key contact. We'll update our records and contact them directly with their login details.</p> <p>The person taking over from you can also use the My account area to tell Parentkind that they are the new key contact. They just need to login, click "Edit my details" and click the "Become key contact" button at the bottom of the form.</p>
Insurance documentation	<p>Your Parentkind membership includes comprehensive insurance for your association.</p> <p>The membership receipt and Insurance Summary document together are your proof of insurance, along with a copy of the FAQs the Zurich have provided for Parentkind members.</p> <p>Your documents are available to download in the My account area (when you're logged in, click on your name at the top of the page to be taken there).</p>
Bank account details	<p>Make sure the new committee members know:</p> <ul style="list-style-type: none"> • Who you bank with, your bank account number and sort code • Current Signatories on bank account • Current holder of cheque book, paying in book and bank statements, online banking details • Arrange for bank account signatories to be changed.
Charity Commission registration number and login details	<p><u>England & Wales:</u> If the gross annual income for your PTA is more than £5,000 it's a legal requirement to register with the Charity Commission. If you are a registered charity, pass on your charity registration number and the login details, which are needed to complete your annual charity return and update the Charity Commission with details of your new committee members/trustees.</p> <p><u>Northern Ireland:</u> All PTAs are required to register with</p>

	<p>CCNI. If you are already registered, pass on the charity registration number and log in details to the new committee. If you're not yet registered, let your successor know so they can continue the registration process.</p> <p>Note: If your PTA has trustees, then you will need to complete the Charity Commission's Trustee Eligibility Declaration, which can be found here.</p>
<p>Gift Aid declarations & HMRC registration details</p>	<p>If your association claims Gift Aid, you need to keep records and pass these on to your successor. Records to pass on include Gift Aid declaration forms and details of cash donations collected under the Gift Aid Small Donations Scheme.</p> <p>Click here for more information about Gift Aid.</p> <p>You'll need to pass on your HMRC registration number and government gateway login details and registered contact.</p>
<p>Accounts</p>	<p>The Treasurer usually holds association accounts and annual reports. Make sure you indicate where historical accounts and annual reports are kept (accounts should be kept for 6 years and the current year).</p>
<p>Minutes of the Annual General Meeting (AGM)</p>	<p>Let new members know where to find the minutes of your last AGM. This will tell them who all elected committee members are. They'll also include an overview of fundraising and other PTA activities for the past year.</p>
<p>Licenses</p>	<p>Any current licenses held by the association:</p> <p>Temporary Event Notice for any upcoming events. This is a 'one off' license needed for the supply of alcohol and some forms of entertainment, provided by your local council licensing department. Find out more about licencing requirements for serving alcohol.</p> <p>Current Lotteries License. This is an annual license needed for some types of raffle and lotteries. Find out more about licencing requirements for raffles and lotteries.</p>

	Current Film License. This can be a 'one off' or annual license, needed if you're holding a film night. Find out more about licences for film showings.
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Information to gather

Once you've got all the essentials in place, gather together all the useful information that you'd like to include in the ideal handover. All the little gems that have been learned over the years through trial and error that will help you and your successors avoid re-inventing the wheel!

The big advice from other PTAs is to store and share this information online using Dropbox, a Google Doc account or similar. But please bear in mind data protection if you are storing personal details.

Information to gather	
Regular helpers	See if there's a list of members who regularly help out at events. Remember if you are storing personal details you need to follow data protection protocols. See our information sheet on data protection good practice.
Event suppliers	It saves a lot of time if you keep a list of who to use and where to buy items and services services, eg DJs for discos, wholesalers for catering supplies and prizes, where you buy the coconuts for the coconut shy and the burgers for the BBQ.
Quantities and costs	How many and how much are common questions. So keep a record of how many burgers you buy for the BBQ and how much you spend on gifts for Santa's grotto. Also consider including information about how much you have charged for activities/food etc.
Fundraising initiatives	Details of any ongoing initiatives with names and contact details. For example, if you have an account with easyfundraising you'll need the login details. Do you run a 100

	club or take part in re-cycling schemes?
Local supporters	It will save a lot of ringing around if you keep a list, with contact details, of local businesses that donate raffle prizes or provide sponsorship.
Matched giving	If you're a registered charity, you may have some members that have a matched funding agreement with their employer. This can really boost your fundraising, so it's worth asking around. Find out more about matched giving .
Communications	<p>If you produce a newsletter there may be an existing template you can use. Past copies can give a good insight into what's been successful in the past.</p> <p>Is there a PTA website , email account or Facebook page? If so, you'll need to know the login details and make sure someone takes responsibility for the administration.</p> <p>Gather together letters and flyers promoting the PTA and PTA organised events, welcoming new starters, recruiting new committee members etc.</p> <p>If your PTA has a logo, save this somewhere accessible so it can be used on letters and emails requesting donations.</p> <p>Find out how to download our Parentkind member association logo to use on your communications.</p>
Equipment	It's good to list the equipment the PTA uses/where it's stored/whether it's owned by the PTA and any agreements there are with the school for using school equipment etc.

Before you stand down from the committee

It's best practice to stay on the committee until the next AGM, where all committee members stand down. If you're not standing for re-election, there are a few things to do before you leave:

Recruit your successors	Establish who's leaving, then start recruiting, making sure the key roles of Chair, Treasurer and Secretary will be filled. Here are our tips on recruiting new members .
Organise the AGM	If you can, support the committee right up to the next AGM. This often takes place shortly after the start of the new school year, if so it's a good idea to advertise it before the school holidays.
Finalise your accounts	If the Treasurer is standing down, make sure any loose ends are tied up and get the accounts ready to hand over to the new committee. If you have an external verifier appointed, make a note of their contact details.
Update PTA contacts and signatories	Make sure you update your committee contacts and details with the following organisations:

Reviewed: August 2018