

PARENTS ASSOCIATION PROCEDURE MANUAL



INTRODUCTION

The following documentation has been prepared on the basis of providing some guidance and information on the purpose and operations of the St James Parent's Association (aka. STJPA).

TEAM INFORMATION & POSITION DESCRIPTIONS

The STJPA is a team of volunteer parents across the whole school parent community who volunteer their personal time and effort to assist the school management and executive teams with the following tasks (but these are not limited to):

- Co-ordination and distribution of regular school updates, event and activity information - as required and/or requested by school management team.
- Co-ordination and management of nominated school activities and events.
- Set-up and management of nominated school social pages (i.e. WhatsApp / Email / Contact information).

STJPA EXECUTIVE

This executive team consists of: President(s) and a Communications Liaison. The president role can be held by 1 or 2 people at any time and it is encouraged to hold these positions for a minimum of 2 years.

The President(s) role is to set the agenda and chair all STJPA meetings and to ensure all school activities and events have assigned volunteers to run them as well as support these activities and the whole team of volunteers for all school activities and events.

Decisions on school spending of funds raised are considered, presented by and discussed by the STJPA team however, final decision on annual spend is at the discretion of the STJ school management team. The STJPA team can set targeted goals for spending in accordance with the needs of the school, students and community groups. This should be done at the end of each year for the coming year ahead and any commitments made, be rolled over into the coming year also.

[Click here to view the following documents for 2022:](#)

[ST JAMES PRIMARY SCHOOL - PARENTS ASSOCIATION MEMBERS 2022](#)

The above link includes proposed list of Events & Activities for 2022

[STJPA PARENT ASSOCIATION 2021 - Role Descriptions](#)

FINANCIAL & PURCHASE INFORMATION

CDF Pay

It is the recommendation by STJ school management and executive team that ALL school purchases, events and activities and any money spent on these things, that directly benefits the school and school communities, MUST be created and managed via CDFPay.

This is an online 'shop' for managing ticket sales and event activities for all catholic schools and it is particularly important that it is used in relation to any and all fundraising activities for catholic schools.

There are no fees associated for tickets or bookings made for events and it offers true transparency of spending in schools which is critical for all catholic schools moving forward and is a directive from MACs.

Please see the following for a short summary of how it is used by school PA teams:

The Admin Portal is located at - <https://stjamesbrighton.cdfpay.org.au/admin>

Username: [Stjames](#) AND Password = [STJ3186](#)

CDF KEY CONTACT(S):

MR PAUL VOLPE

CDFpay Product Specialist | Catholic Development Fund – Melbourne

Phone Direct: (03) 9926 2217

Location: Level 5 | St Patrick's Centre | 486 Albert Street | East Melbourne VIC 3002

Postal: PO Box 146 | East Melbourne VIC 8002

Support Email: support@cdfpay.org.au | **Web:** www.catholicdevelopmentfund.org.au |

LinkedIn: [CDF Melbourne](#)

Paul is the key contact who set up the CDF shop for St James and provided minimal training to a small group at the end of 2019. It is always best to email the support email (see below) for setting up shops (new events) first, most of which will generally be answered/responded to by Paul Volpe.

For all **new users** to CDFPay, it is a system that only Administrators with the above access and login details should access and manage (i.e. STJPA Executive Team & School BURSA). All users of the system can and should contact the CDF support team who can provide a quick overview of how to use the system, create new/revise existing “shops”, and support parents with purchasing tickets to all school events.

The following information is to provide a short overview of CDF and how to use it.

Guides & Support



[New Parent Guide \(PDF\)](#)
[Existing Parent Guide \(PDF\)](#)



[Administrator Guide \(PDF\)](#)
[Financial Reporting \(PDF\)](#)



[School Admin Guide Video](#)



[CDFpay Poster](#)



[Email Support](#)

- The parent **Guides & Support** are a good resource to educate and onboard new parents.
- The **Administrator Guide** discusses many areas covered in the training day.
- The **Video** is a great resource to refresh how to add items / manage orders etc.

Manage your CDFpay Site



[Your School Shop](#)



[Manage Your Shop](#)



[View Reports/Sales](#)

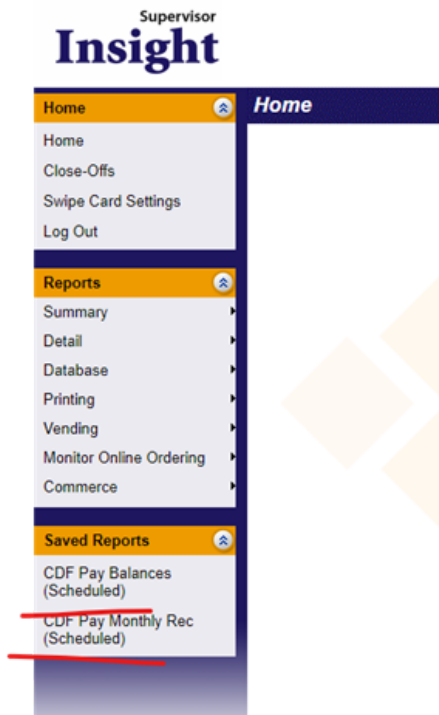


[Manage Users](#)



[Your School Site](#)

- **Manage your Shop** is where you can create Shop Groups / Items and Manage Orders – as mentioned in training, there is no ‘Sandpit’, turning **items off green** will hide them from the shop and make tickets/activities unavailable or visible to parents via their own CDF profile.
- **CDF Support** should always be asked to set up new shops OR adjust previous year shops and for all enquiries in relation to how to use and/or access CDF Pay. Please contact them via their support email – support@cdfpay.org.au.



Under **View Reports / Sales** – you can login and view the scheduled reports that can be created – Balances and Monthly Reconciliations. These will be sent on the first of the month.

Supervisor
Insight **St James Primary Brighton**
3810: Reconciliation Report By GL Code

07-Dec-2019 10:00 pm To 08-Dec-2020 10:00 pm

Summary Report

From : 08-December-2019

Opening Balance

\$ (0.50)

		Quota	Spend	Net	GST	Total
Plus Add Value Transaction	MyMonitor:NAB Transact	\$0.00		\$(6,753.50)	\$0.00	\$(6,753.50)
	Total	\$0.00		\$(6,753.50)	\$0.00	\$(6,753.50)
Less Expenditure	EB - Easter Buns	\$0.00		\$547.50	\$0.00	\$547.50
	ER - Easter Raffle Tickets	\$0.00		\$1,656.00	\$0.00	\$1,656.00
	GD - Year 6 Grad	\$0.00		\$960.00	\$0.00	\$960.00
	SJ - Cookbook	\$0.00		\$675.00	\$0.00	\$675.00
	TG - Teacher Gift	\$0.00		\$2,915.00	\$0.00	\$2,915.00
	Total	\$0.00		\$6,753.50	\$0.00	\$6,753.50

To : 08-December-2020

Total movement for period
 Calculated Closing Balance
 Actual Closing Balance
Total variance for period

\$0.00
 \$(0.50)
 \$(0.50)
\$0.00

A former STJ Parent / Former Treasurer, set up CDF as directed by and on behalf of STJ and has corrected the reports to ensure all the GL CODES and GL NAMES are aligned with the right sales.

Finally, if you feel students need to be in permission groups per year level so they only see certain shop groups, this can be done in 2022 but will need to work with the school and CDF support teams directly on this.

REIMBURSEMENTS

Following the centralisation of finance services in MACS, there are new procedures that need to be followed by those who may need to purchase or pay for services or products. Please use the following guidelines to help ensure that payments can be done quickly and correctly, as well as ensure that parents are not out of pocket / reimbursed quickly. We would like to be able to not have any parents involved in PFA to be out of pocket. Our guidelines tell us that where possible an invoice from a creditor is preferred.

If at any time you have any questions, please contact Imelda Cuaresma via icuaresma@stjamesbrighton.catholic.edu.au

[Click here to view](#)  **Procedures for Parent Association purchases**

TryBooking.com

TryBooking.com is a paid online event planning platform that has previously been used by STJPA for coordinating the ticket sales and event activities and purchases, for past STJ school events (typically outside school events). This is now superseded by CDFPay but just FYI:

It is a fantastic platform that is very easy to use and navigate and events can be created from new or copied from existing listings each year however, it does issue online booking fees for its service for every single ticket (or ticket bundle) sold to parents - booking fee has previously been 0.50 cents per booking. This has usually been factored into the ticket price to ensure this cost is considered and transparent with parents.

Please see the following for a short summary of how it is used by school PA teams:

The Admin Portal is located at - <https://portal.trybooking.com/au/dashboard>

Username: Stjamesbooking@gmail.com **AND Password =** [StJ1mmys3186](#)

ST JAMES PRIMARY - EVENTS

All STJ school events and activities are typically the same year on year however, the details such as venue, date, ticket price and ticket bundles and overall booking process, may change depending on what the requirements are for each event moving forward. This is managed directly by the STJPA Executive team in accordance with and in agreement with the school management team.

A list of all activities and who is coordinating the events for 2022 can be found online below:

[ST JAMES PRIMARY SCHOOL - PARENTS ASSOCIATION MEMBERS 2022.](#)

TEACHERS GIFTS

We have a specific guideline around provision of gifts for teachers each year and nominated class reps are responsible for coordinating the funds raised and purchase of these items in accordance with school management rules and MACs directives here. This may change each year and should always be discussed with and agreed with the STJ school management team for the latest information and guidelines here.

ONLINE DOCUMENTATION

The following link provides access to all digital documentation, yearly folders and files (most of which have been created/duplicated via Google Docs):

- [2020 STJPA documets](#)
- [2021 STJPA documents](#)
- [2021 Agendas, Minutes, Newsletters, Procedures/Guidelines and AGM Reports](#)
- [2021 Individual Event Folders: Overviews, Budgets and Past Coordinator\(s\)](#)
- [2021 Co-Chairs newsletters](#)
- [2022 STJPA Volunteer / Contact spreadsheet](#)

2021 KEY CONTACTS

The following list of contacts are the team of volunteers that have supported the STJ PA over the last two years and created the digitised files for all events and activities (as required).

Please contact the following for any questions you may have or for further clarification and information pertaining to running the STJ PA group.

STJ Parents Association - Executive Team

Position	Firstname	Surname	Email	Mobile
STJPA President	Katrina	Cheshire	katrina.cheshire@bigpond.com	0409 004 575
STJPA President	Kate	Korber	kkorber@stmhadfield.catholic.edu.au	0408 360 231
Treasurer	Lee	Hemmingway	HemingL@cba.com.au	Available on Request
Secretary	Candice	Murray-Beckham	candicembeckman@gmail.com	Available on Request

STJ School Management Team

Position	Firstname	Surname	Email	Mobile
Principal	Brendan	Flanagan	bflanagan@stjamesbrighton.catholic.edu.au	Available on Request
Deputy Principal	Carmelina	Corio		Available on Request
Administration Assistant	Ange	Franich	afanich@stjamesbrighton.catholic.edu.au	Available on Request
Office (Main)	Ange / Imelda		info@stjamesbrighton.catholic.edu.au	+61 3 9596 4766
CDF Contact				As Above

2022 STJ PA - NEW TEAM

Please update the above key contacts page each year when you copy over digital documents and create a new year (i.e. 2023). Please remove the previous year's details. THANK YOU and GOOD LUCK!!