

Killowen Primary School & Nursery Unit PTA

Annual Report & Statement of Accounts

For the period ended 31 August 2023

Charity number: NIC104225

**Killowen Primary School & Nursery Unit PTA
Trustees' Annual Report
For the period ended 31 August 2023**

The trustees present their Annual Report and Statement of Accounts for the period ended 31 August 2023 including a Statement of Assets and Liabilities at that date.

Reference and Administrative Details

Killowen Primary School & Nursery Unit PTA
20 Laurelhill Road
Lisburn
Co. Antrim
BT28 2UH

Registered Charity in Northern Ireland - NIC104225

Charity Trustees

The charity trustees who served during the year or who were trustees at the date of this report were:

Karen Nichola Watson	
Ashley Mulligan	
Samantha Martin (Chair)	
Paula Kydd (Secretary)	
Lorna Featherstone (Treasurer)	
Suzanne Duncan	(Resigned 10 November 2022)
Fiona Douglas	(Resigned 10 November 2022)

Structure, Governance and Management

The charity trustees of the PTA are members of its committee. The charity's governing document is the Constitution.

To be elected as a trustee of the charity a person must be a member of the PTA. The committee is re-elected each year at the AGM. Nominations for elections to the committee may be made by any member of the PTA and seconded by another.

Purpose

The trustees seek to advance the education of the pupils of Killowen Primary School & Nursery Unit.

This is achieved by developing effective relationships between the staff, parents and others associated with the school and by engaging in activities or providing facilities or equipment which support the school and advance the education of the pupils.

The property and funds of the charity must only be used to fulfill the purposes.

Activities and Objectives

We are an active PTA made up of elected parents and teaching staff. Throughout the year we organise fundraising events such as discos, breakfast mornings, Christmas fair and a family fun night and barbeque. All these events are open to all children and their families and help build stronger home, school and community relations.

We also provide support to the school by providing refreshments on such occasions as the Remembrance Service, Christmas plays, special assemblies and the school leavers morning. All funds raised at these events go with the guidance of the school to the provision of resources and equipment that will enhance the educational needs of our pupils.

Achievements

This school year saw the full return of PTA activities following a few years of restrictions due to social distancing and COVID-19. We were able to host the majority of our usual annual events with the only exception being the Christmas Fair in 2022. We will however have the opportunity to host the Christmas Fair in 2023. In place of the Christmas Fair we ran a bauble decorating competition which the majority of the school took part in. It's wonderful to see the pupils get creative. We were incredibly grateful to our local Tesco Community Champion for donating enough prizes for all 16 of our classes to have two winners.

We also held refreshments throughout the year at our Harvest Service, the Nativities and Carol Service and the annual Sports Day. In the spring, we had the pleasure of serving refreshments at the school's final performances of Matilda: The Musical. The shows were a great success for the school and for the PTA. We complimented the event with a raffle and we were overwhelmed by the donation of more than twenty prizes to the value of £640.

We ran some smaller events throughout the year but our biggest night of the year was our Summer Fun Night & BBQ held in June. This was our first Fun Night in four years and the first time many of the families at Killowen had the chance to experience it. The support for this event was incredible with a turnout that has not been seen for many years. A lot of preparation went into the Fun Night and we could not have achieved the successful night that we did without the support of our PTA volunteers and all of the school staff. A special thank you also goes to the local businesses and supporters that volunteered their time or gave us great deals to make the night extra special.

All of these events and activities that we held throughout the year enabled us to raise essential funds to support the school and nursery through the provision of support and equipment to enhance our children's educational experience at Killowen. We are excited for the year ahead and more successes.

Public Benefit Statement

Improved relationships between home and school

The benefit which flows from this purpose includes funding for additional resources for the school and links built with the local community. This is demonstrated through having an active PTA that works in partnership with the school and engages parental support. The benefit is for children at Killowen Primary School, Lisburn. Charity trustees (PTA committee members) are usually also parents at the school which their children attend and hence gain benefit in the same way as all other beneficiaries. This benefit is incidental and necessary to ensure the benefit is provided to all beneficiaries.

Public Benefit Statement cont'd

Advancing the education of pupils in the school

The benefit which flows from this purpose includes increased educational progress and attainment of pupils in the school and links built with the local community. This is demonstrated through pupils having access to resources, events, activities and links with the local community which are not available through direct school funding. The benefit is for children at Killowen Primary School, Lisburn. Charity trustees (PTA committee members) are usually also parents at the school which their children attend and hence gain benefit in the same way as all other beneficiaries. This benefit is incidental and necessary to ensure the benefit is provided to all beneficiaries.

The charity trustees have had regard for the Charity Commission for Northern Ireland's public benefit requirement statutory guidance.

Financial Review

The charity's main source of income each year is from its fundraising activities throughout the school year as discussed above. This was our first full year of events and activities following COVID-19 restrictions. The PTA raised £8,402 through fundraising activities during the year.

The total income for the charity this year was £9,120 (£254 in 2022). The PTA committee took the decision to reinstate the annual family voluntary contribution this year and there was a great response with £545 raised. We also received donations of £173.

The expenses for the year amounted to £5,752 (£144 in 2022). Fundraising expenses were £2,775, the majority of which was for the Summer Fun Night. During the year the PTA made contributions and donations to the school of £1,686 as detailed at note 4. The school has various projects for which we continue to try and raise funds that we hope to be able to support in the coming years. Governance and operational costs remain minimal each year.

The trustees agreed to change the year end to 31 August from 30 September for this year going forward to be in line with the school academic year. This has had little impact on the figures as no transactions usually occur in September.

Trustees' responsibilities in relation to the financial statements

The charity trustees are responsible for preparing a trustees' annual report and statement of accounts in accordance with the requirements of the Charities Commission for Northern Ireland.

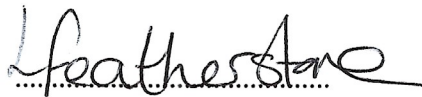
The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act (Northern Ireland) 2008 and The Charities (Accounts and Reports) Regulations (Northern Ireland) 2015. They are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

As the charity's income does not exceed £250,000, the trustees have elected under Section 64(3) of the Charities Act (Northern Ireland) 2008 to prepare receipts and payments accounts and a statement of assets and liabilities.

Approved by the trustees on 7 November 2023 and signed on their behalf by:



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Samantha Martin
Chair



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Lorna Featherstone
Treasurer