



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

Period Start Date
From: 1 September 2023

Period end date
To: 31 August 2024

Charity name: Jubilee School PTA

Charity registration number: 1179031

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>The objective of Jubilee PTA is to advance the education of pupils in the school in particular by:</p> <ul style="list-style-type: none">- Developing effective relationships between the staff, parents and others associated with the school- Engaging in activities or providing facilities or equipment which support the school and advance the education of the pupils.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>Jubilee PTA raises money to supplement educational materials, extra-curricular activities and support ongoing and one-off educational projects for pupils.</p> <p>The benefits gained by the PTA's efforts include collaborating closely with the school to develop enrichment activities, responding to requests for enhancement resources and equipment, facilitating regular meetups within the school to support community engagement and promote inclusivity and diversity, rallying support from parents and carers for fundraising and volunteering initiatives, as well as offering extra opportunities for pupils that would not be available via school funding.</p> <p>Ongoing projects:</p> <ul style="list-style-type: none">- Library ensures that our children have well-stocked, interesting, and diverse classroom and library bookshelves to develop a love of reading.- Assisted Reading gives children time with an adult to hear the child read- Garden allows children access to growing spaces, where most of our

		<p>children have no outside space at home.</p> <ul style="list-style-type: none"> - Drama gives all children, regardless of parental income, time to develop oracy, performance and confidence with specialist drama tuition. - Pre-Loved Uniform supports our school's environmentally conscious schemes and ensures wearable uniform is always available.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The charity affirms that it exists and operates exclusively for charitable purposes for the benefit of the public and to further its cause in doing so by her activities and decisions in accordance with the Charity Commission's guidance.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<p>Submissions</p> <p>Applications are submitted to the PTA by the school, where a delegated member of the Senior Leadership Team (SLT) has reviewed and approved it internally, before submission.</p> <p>Requests received by the first Friday of each term can be considered at the PTA Committee's termly meeting the following week.</p> <p>Urgent requests can be considered at any time.</p> <p>If the request includes paying an external contractor, the school will evidence that best value procedures have been followed (such as gaining 3 quotes per job).</p> <p>For projects that are continuous/repeat funding (e.g. drama, garden, books) the school will provide an estimated cost for the year for consideration at the AGM which is considered by the wider school community.</p> <p>Decision Making</p> <p>If the PTA Committee decides that the funding request can be granted, an email will be sent to the nominated SLT member to confirm the decision and amount granted.</p> <p>If the amount required is over £1,000 the PTA Committee may take a guidance vote with the wider membership at a regular PTA event and will advise the nominated SLT member of their decision as soon as possible.</p>

		<p>Funds</p> <p>The PTA Committee will hold funds allocated for projects in its account until drawn down by school. This includes money raised specifically for named projects (restricted funds, e.g. solar panels, 'bike for books'), and money allocated for one-off or continuous projects from general fundraising (designated funds, e.g. garden, musical instruments).</p> <p>The PTA Committee will update the nominated SLT member after Committee meetings with a summary of funds allocated but not yet drawn.</p> <p>Payments</p> <p>Once the PTA has approved the request one of the following two processes will happen:</p> <ol style="list-style-type: none"> 1. The PTA sends the school the funds. The school will pay the invoices/costs using those funds and provide the PTA with a copy of the invoice [or payment receipt]. If less funding is needed, school can propose to PTA how they will use the remainder for a similar purpose, to be agreed by PTA, or return the balance. <p>OR</p> <ol style="list-style-type: none"> 2. The school pays the relevant costs/invoice and then provides the invoice [or payment receipt] to the PTA. Following receipt of this the PTA will pay over the funds to the school. If only part-payment is required from the PTA (for example, if Parentmail ticket sales have covered part of the total invoice cost), PTA should be asked for the top-up, not the full cost of the invoice. <p>If funding is no longer required for the original purpose the nominated SLT member should alert the PTA Treasurer to discuss whether the fund can be repurposed.</p>
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	<p>As a volunteer-run charity, we would be unable to achieve anything without the dedication, enthusiasm and support of our team of volunteers. Whether giving an hour at a single event, an hour a week hearing children read, or more for the core events</p>

		team, every contribution is very much appreciated. We had at least 75 active volunteers in 2023-24, and thank every one of them for their support.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>Fundraising Events 2023-24 was a record-breaking year for Jubilee School PTA. We held more events to involve and engage the whole school community, secured more grants, tried new things and raised more money than ever before. In addition to our £45,280 charitable income, a further £44,493 was paid directly to the school for solar and gardening projects, in grants which we helped secure. Our fundraising focus was the solar project, which we were delighted to be able to fund without affecting our other commitments to funding garden, drama, books and other projects for the school.</p> <p>International Welcome 2023 This free event brought the community together to start the new school year positively, sharing our foods, cultures, and dress, and donations totalled £460</p> <p>Bonfire Night Hot dogs, marshmallow toasting, hot drinks and sweet treats around a bonfire in the meadow raised £966</p> <p>Winter Fair Children's bake-off, Santa's Grotto, BBQ, bar, arts & crafts activities, lucky dip, prefects' pick 'n' mix, and a very successful raffle. Including the raffle the fair raised £6,558: another festive success.</p> <p>Readathon Children's sponsored reading challenge – points for reading different things, in different ways, and unusual places to read – on a horse, in the bath, on a table... this raised £2,583 for books.</p> <p>Yard Sale Families put their bric-a-brac and food stalls on a local map for the school and wider community to browse and buy, raising £1,639</p> <p>Celebration of Black Culture This event invited the school community to share a taste of African and Caribbean food and culture</p> <p>Eid Party Delicious food and cakes, henna tattoos, and crafting shared the joy of Eid with our community and raised £858 for school projects.</p> <p>Summer Fair Carnival Cubicars, JusBall, games, crafts, face painting, cakes, bar, snowcones, BBQ, soak-a-teacher, and an</p>

		<p>amazing jerk chicken stall raised £4,574 (with match funding from parents' companies tbc)</p> <p>Make, Bake, Create An end-of-year garden open day, children's art show, choir, crafting activities, baking. The children enjoyed showing their families what they had been growing in the garden. Donations totalled £559.</p> <p>Other Fundraising: <u>Small-scale events</u> Complemented the large, established events, and included the choir's Carol Concert, movie nights and discos. These raised £2,198 <u>Challenge events</u> Governor Stephanie completed the Brighton Marathon dressed as a sun and raised £2,053. A group of our brilliant Jubilee teachers once again hopped in the saddle to 'cycle for solar' – their efforts were sponsored by friends, family and the Jubilee community and raised £1,046 <u>Regular Giving</u> Our regular giving programme got into its stride this year, raising £8,255 from families choosing to support us each month, and adding Gift Aid on top. <u>Corporate funding</u> Sponsorships and employers match funding raised £6,257 <u>Donations and grants</u> One-off donations were £1,828, grants £624 <u>Earned income/other</u> Greeting cards project, easyfundraising, Stikins labels donations, pop-up stalls, preloved uniform and Gift Aid brought in £6,014</p> <p>Thank you to all our events and challenge participants, organisers and donors, as well as the school team, for dedicating time, energy and goodwill to our school.</p> <p><u>PTA Projects and Spending</u> We were able to fund a large number of projects this year, with a total of £35,891 of grants being made, and several committed for next year.</p> <p>Library We had a productive year in the school library. Our team of wonderful volunteers, working with the teaching staff, have sorted a backlog of donated books, added new shelving, and are continuing to add more new and diverse titles to our shelves. We committed to spend £2200+ on books for library and classrooms, which was invoiced by the school after the reporting year.</p> <p>Assisted Reading 50 of our brilliant Jubilee pupils have been working extra hard on their reading this year, with support from 13 dedicated volunteers, as part of the Jubilee Reading Programme. We've had great feedback from teachers who feel that having a consistent adult to read to has been a definite factor in their progress.</p> <p>Drama</p>
--	--	--

		<p>We were able to support the LAMDA drama provision for Year 3-4 pupils again this year, as well as targeted small-group work for children who benefit from additional support with oral communication skills, confidence and social skills. We supported the drama provision with £4,880 for the year</p> <p>Garden Children across the school enjoy gardening sessions with Sue. With a grant from Whole Foods Foundation, this term the old greenhouse has been fixed and cleared out, ready to use for small group activities. Children have been harvesting bumper beetroot, tasting our rhubarb, and frog spotting in our pond! We're so lucky to have a garden and to be able to share it with our children, most of whom have no outside space at home. We spent £5,035 on the garden provision.</p> <p>Preloved Uniform A small team of parents were busy all year collecting, sorting, washing and selling preloved uniforms. This project cost nothing, as everything was donated, and raised £695 for the school, kept wearable clothes out of landfill and helped out Jubilee families that needed new uniform.</p> <p>Solar energy Working with Stokey Energy and the school, we helped secure £42,500 from Hackney's Community Energy Fund, and raised £20,000 through our events, to put solar panels on the roof of our school in July 2024. This could generate 40% of our school's electricity needs, saving £13,000-£23,000 on annual energy bills and reducing our carbon footprint by 10 tonnes of CO2 every year – the equivalent of planting 475 trees. We're delighted to have been part of making this happen and to have had so much support from the community to do so.</p> <p>Other Grantmaking We were able to support other requests for support from the school this year: regular commitments were maintained, providing a Christmas gift for every pupil from Nursery-Y6 and a leaver's hoodie for each Y6 pupil, as well as supporting the Y5 Kench Hill residential with some bursary funding to enable as many children to attend as possible. We were delighted to pay for author visits to enrich children's learning, and more equipment to support the music lessons in the school. Other grantmaking totalled £5,423</p> <p>PTA Governance At the AGM in April 2024 six Trustees stood for re-election and two new Trustees stood for election. All 8 were voted in. We thank all our Trustees for stepping up - without Trustees we have no charity.</p> <p>We held a 'Have Your Say' event immediately after the formal AGM to seek input from parents and teachers, using visual aids and ratings-scale anonymous voting bars, on the sorts of projects that the PTA community would be most keen to see us focus on in future.</p>
--	--	---

		<p>Responses indicated that drama, garden, and books were most popular, and indicated some areas where more discussion may be needed before committing funds or fundraising.</p> <p>We maintained our membership of Parentkind and the paid JustGiving service which enables us to claim Gift Aid efficiently. We tested a free PTA-events account to make ticket sales and administration more straightforward. We have no plans to upgrade. These operational fees and incidental equipment/repairs and consumables totalled £1,250 (approx 4.5% overhead), with expenses for events totalling £4,559</p>
--	--	---

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>We ended the year with £31,008 in the bank, of which £5,183 is restricted. We fundraise in advance for expected requirements from the school, having discussed fundraising targets and school needs with the school business manager, so the unrestricted funds raised have been designated for commitments in the 2024-25 academic year: £11,800 for drama provision, £6,500 for gardener and garden resources, and £4261.33 for new phonics books.</p> <p>In-year fundraising is required next year to maintain current levels of funding for expected requests from the school for resources, and some planned improvements that will enhance the learning environment.</p>
---	-----------	---

Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Trustees are maintaining the target level of free reserves to hold one school term's committed spend in free reserves, due to the rising cost of living, and increased uncertainty about the fundraising landscape. Holding one term's funding (£5,000) in reserve allows us to commit to funding ongoing provision for drama and gardening, with funding in place for any notice period that could be required.
Amount of reserves held	Para 1.22	Restricted: £5,183 Designated: £22,561 Free Reserves: £2,634 - temporarily below our Reserves policy, because we have designated from the reserve sufficient funds to pay for the full year of drama and gardening in advance (rather than one term). Our regular giving income and events will replenish the reserve, in the meantime this is sufficient operating capital to run planned fundraising events this term.
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	none

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.4	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	Unincorporated Association
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<p>As set out in our constitution, Trustees are elected by the charity membership at the Annual General Meeting.</p> <p>Co-opted Trustees may be nominated and approved by the Trustees, but may not number more than half the number of the elected Trustees.</p> <p>All Trustees must resign and seek re-election at the next AGM.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<p>A formal handover meeting takes place between outgoing and incoming Trustees to allow for induction and initial training.</p> <p>The Essential Trustee handbook and free webinar training is offered to all new Trustees, in key areas such as charity governance and charity finance.</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The PTA is an active member of Parentkind, which provides advice, policies and insurance to support good governance.
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Jubilee School PTA
Other name the charity uses	N/A
Registered charity number	1179031

Charity's principal address	C/- Jubilee Primary School Filey Avenue London N16 6NR

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Alison Rea	Co-Chair		
2	Amina Hajat	Co-Chair		
3	Harriet Brennan	Co-Secretary		
4	Rebecca Wiltshire	Co-Secretary		
5	Christopher Pope	Treasurer		
6	Zoe Maxwell	Trustee		
7	Matthew Gretton	Trustee	25 April 2024 onwards	
8	Ayesha Sayed	Trustee	25 April 2024 onwards	
9	Chery-Lynn Booth	Co-Chair	10 March 2023 - 25 April 2024	
10	Sophie McKay	Co-Chair	10 March 2023 - 25 April 2024	
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

Other optional information

--

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

	Signature(s)	
	Full name(s)	
	Position (eg Secretary, Chair, etc)	
	Date	



1179031

CC16a

01/09/2024

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
Donations	19,922	5,253		25,175	7,992
Events	17,523	2,582		20,105	17,488
Solar Funding Grant					2,000
Sub total (Gross income for AR)	37,445	7,835	-	45,280	27,480
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	37,445	7,835	-	45,280	27,480


[illegible]

13/06/2025

	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	- 33,244	- 8,560	-	- 41,804	19,259
Net of receipts/(payments)	4,201	- 725	-	3,476	8,221
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	20,993	6,538	-	27,532	
Cash funds this year end	25,194	5,813	-	31,008	8,221

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash in Bank	25,194	5,813	-
				-
		-	-	-
	Total cash funds	25,194	5,813	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
		Chris Pope	11/02/2025
	#VALUE!	Alison Rea	11-Feb-25



Andre F. <andre.flanders@googlemail.com>



To: You

Fri 28/02/2025 20:05

Hi Chris

It looks fine. The top-line income and expenditure seems to be coming from the right places, and everything is summing consistently, so it look broadly ok.

The only minor thing I could find was that the opening cash fund balance as at 2 Sep 2023 doesn't quite tie up with the close from last year - but less than £100 out so probably not material.

If there is anything in particular you want me to look at in more detail, let me know.

Cheers

Andre