



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 1	Month August	Year 2023		Day 31	Month July	Year 2024

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

Broadstone Middle School	
Dunyeats Road	
Broadstone	
Postcode	BH18 8AE

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	Mark Grigsby	Chair		
2	Claire Maybury			
3	Holly Alderman		Until 18 September 2023	
4	Tiffany Allen		From 18 September 2023	
5	Emma Waters		From 25 November 2023	
6	Naomi Lewis		From 18 September 2023	
7				
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16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution (using the model supplied by Parentkind for PTAs)
How the charity is constituted (eg. trust, association, company)	Association
Trustee selection methods (eg. appointed by, elected by)	Elected at AGM

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

none

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

THE OBJECT OF THE ASSOCIATION (THE OBJECTS) IS TO ADVANCE THE EDUCATION OF PUPILS IN THE SCHOOL IN PARTICULAR BY: 2.1 DEVELOPING EFFECTIVE RELATIONSHIPS BETWEEN THE STAFF, PARENTS AND OTHERS ASSOCIATED WITH THE SCHOOL 2.2 ENGAGING IN ACTIVITIES OR PROVIDING FACILITIES OR EQUIPMENT WHICH SUPPORT THE SCHOOL AND ADVANCE THE EDUCATION OF THE PUPILS.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The charity focuses on running events connected to Broadstone Middle School. These events bring together staff) parents and other parties relating to the school for a positive purpose. The funds raised at these events are then invested on items / projects / activities aligned with the school to maximise the benefit for the pupils.

At the start of each year the trustees are reminded of the guidance published by the Charity Commission, and any new trustees are onboarded to the same.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Grants are made to the school subject to a presentation / explanation of cost vs benefit made by a member of school Senior leadership Team.

The charity relies on significant volunteer contributions from a small number of parents and some staff to plan and run events.

Summary of the main achievements of the charity during the year

Once again the largest fundraising event this year was the annual Fireworks event, attended by over 2000 people from the school and local community, and raising a significant sum.

Discos were held for each year group across the school, which continue to be popular among the pupils especially at Key stage 2.

We held a successful Christmas Fayre, another lovely opportunity for staff, students and parents to mix together and build connections, as well as a decent fundraiser mainly by means of our raffle.

We continue to run a highly successful weekly lottery which brings in a steady income throughout the year.

The charity funded several important projects for the school throughout the year, based on priorities suggested by school leadership.

Section E

Financial review

Brief statement of the charity's policy on reserves

Money Is spent where possible within a year of it being raised, subject to their being suitable projects within the school which are worthy of the grant, the charity will keep higher reserves, at discretion of trustees, should there either be a significant project(s) which is a long term fundraising goal.

Details of any funds materially in deficit

none

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

none

Section F

Other optional information

none

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)

M. E. G.

Full name(s)

Mark Edwin Grigsby

Position (eg Secretary, Chair, etc)

Chair

Date

26/5/25

BROADSTONE MIDDLE SCHOOL



PARENT TEACHER ASSOCIATION

Registered Charity no. 1179334

INCOME AND EXPENDITURE REPORTS YEAR ENDING 31 JULY 2024

Chair - Mark Grigsby

Treasurer - Tiffany Allen

Independent Examiner - Sarah Gallop

Broadstone Middle School Parent Teacher Association

Reconciliation of Net Increase in Funds for Year ending 31 July 2024

Opening Balance

Cash in Current Account	£	25,479.96
Cash in Hand	£	984.63
Owed to School	-£	7,548.61
	£	18,915.98

Movement in year

Income for the year		£	29,784.14
Expenditure for the year	£	26,643.99	
Net increase in funds		£	3,140.15
Closing funds		£	22,056.13

Closing Balance

Cash in Current Account	£	27,766.89
Cash in Hand	£	2,489.62
Owed to School	-£	8,200.38
	£	22,056.13

Treasurers Report

It has been a great year for fundraising activities this year making an incredible £29,784 income and increasing our funds by £3,140. Our most successful event again was the fireworks which is a joint event with Broadstone First School. This event made a staggering £10,706 and is a great fundraiser as well as being open to the local community which has become a local tradition.

Our Christmas Fayre was again a success. The famous raffle with the children's class hampers being excellent sought after prizes. The competition between classes and teachers increases each year. The pound matching for the raffle is included in the figures which totalled £750 from Barclays - thank you.

The School Lottery is a great earner raising £2,134 this year. It helps raise funds with the added bonus that a parent is going to win each week.

Another positive fundraiser is our Nearly New Uniform. Donations are made by parents each year and it helps a lot of parents with uniform raising £279 this year.

Our year discos are always a good opportunity for the children to let off some steam and a good earner for us - £1,764 for the year.

With the funds raised we gave £1,750 to the school to pay towards the Sparx Maths subscription. We also spent £1,200 on reading books to help those with specific needs with their reading. We helped support the High School Musical show put on by the students at a local theatre - £942 on microphones (which can be used for any future shows), £500 on costumes and £292 on other equipment for the show.

We are extremely grateful for the support of parents, teachers and the local community.


Broadstone Middle School Parent Teacher Association
Income and Expenditure Report for Year ending 31 July 2024

Fundraising	Income	Expenses
Tuck	1,295.97	923.95
Lottery	2,154.65	20.00
2nd Hand uniform	279.41	-
Yr 8 disco	537.22	106.60
Fireworks 2023 - whole event	18,081.07	7,374.66
Fireworks 2023 - BFS share		5,353.21
Christmas Fayre	2,376.96	375.62
Christmas Film Night	671.09	228.10
Yr 7 Disco	573.37	152.38
Yr 6 Disco	706.31	106.14
Yr 5 disco	561.21	248.21
Sports Days	158.51	94.90
Leavers Hoodies	2,388.37	2,290.73
Overheads	-	611.66
School donations *	-	8,757.83
TOTAL	£ 29,784.14	£ 26,643.99

* School donations

UBC support	600.00
Sparx maths	1,750.00
Class prizes	70.00
HSM Equipment	292.79
HSM Costumes	500.00
HSM alcohol licence	21.00
Audio equipment (mics)	942.22
Christmas Tree	18.75
Intervention specific reading books	1,200.00
Yr 5 trip contribution	400.00
SATS breakfast + ice cream	627.02
Yr 8 Leavers Event	2,268.95
Ice pops for sponsored walk	67.10
	<hr/>
	£ 8,757.83

Profit / (Loss)	
	372.02
	2,134.65
	279.41
	430.62
	10,706.41
	(5,353.21)
	2,001.34
	442.99
	420.99
	600.17
	313.00
	63.61
	97.64
	(611.66)
	(8,757.83)
£	3,140.15

 CHARITY COMMISSION FOR ENGLAND AND WALES		Independent examiner's report on the accounts	
Section A		Independent Examiner's Report	
Report to the trustees/ members of		Charity Name The PTA of Broadstone Middle School	
On accounts for the year ended		31 st July 2024	Charity no (if any) 1179334
Set out on pages		Separate File <small>(remember to include the page numbers of additional sheets)</small>	
Responsibilities and basis of report		<p>I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/07/2024.</p> <p>As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").</p> <p>I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.</p>	
Independent examiner's statement		<p>I have completed my examination. I confirm that no material matters have come to my attention () in connection with the examination which gives me cause to believe that in any material respect:</p> <ul style="list-style-type: none"> • accounting records were not kept in accordance with section 130 of the Act or • the accounts do not accord with the accounting records <p>I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.</p> <p><i>* Please delete the words in the brackets if they do not apply.</i></p>	
Signed:		SARAH GALLOP Date: 24.05.2025	
Name:		SARAH GALLOP	
Relevant professional qualification(s) or body (if any):			
Address:		32 MARKHAM AVENUE BOURNEMOUTH BH10 7HN	
Section B		Disclosure	
		Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).	
Give here brief details of any items that the examiner wishes to disclose.			