

# THE WELBURN HALL HOME-SCHOOL ASSOCIATION (IN CONNECTION WITH WELBURN HALL SCHOOL)

England & Wales · Charity number 529656

## Details

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Other names	HOME-SCHOOL ASSOCIATION, WELBURN HALL HOME-SCHOOL ASSOCIATION
Status	Registered
Legal form	Other
Registered	1971-02-04
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Address	Kirkbymoorside North Yorkshire YO62 7HQ
Phone	01751431218
Email	<a href="mailto:Homeschool@welburn-hall.n-yorks.sch.uk">Homeschool@welburn-hall.n-yorks.sch.uk</a>
Website	<a href="http://www.welburn-hall.n-yorks.sch.uk">www.welburn-hall.n-yorks.sch.uk</a>

## Activities

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**Objects:** PARENT-TEACHER ASSOCIATION

**Activities:** The Association supports the education and welfare of pupils by fostering relationships with staff, parents and other associates of the school and engaging in activities which assist the pupils' education both in and out of the classroom. Fund raising events include the annual garden party, car boot sales, quizzes. Funds support theatre trips, keep fit/play equipment and larger projects.

## Classification

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- **How:** Provides Other Finance, Other Charitable Activities
- **What:** Education/training
- **Who:** Children/young People, People With Disabilities

## Geography

- **Area of benefit:** WELBURN HALL SCHOOL KIRBYMOORSIDE YORKS
- North Yorkshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-05		-	-	-
2024-04-05	£18,000	£13,500		-
2023-04-05	£6,712	£21,113		-
2022-04-05	£30,854	£675		-
2021-04-05	£447	£8,596		-

## Trustees

Name	Role	Appointed
Charlotte Dobson		2023-04-27
Evette Louise Dadswell		2025-12-09
Marianne Best		2020-11-30

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# Accounts

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## Trustees' Annual Report for the period

From **6/04/21** Period start date To **6/04/22**  
Period end date

Charity name: **Welburn Hall Home School Association**

Charity registration number: **529656**

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	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	<b>Strong links with local charities including joint fundraising events attended by members of the public. Charity fundraising events held in school throughout the year - families are encouraged to attend e.g. Macmillan Coffee Morning, Comic Relief.</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>Activities are planned in consideration of the guidance issued by the Charity Commission on public benefit. All activities aim to promote positivity around disability and community engagement.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	

Contribution made by volunteers	Para 1.38	
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><b>Disability awareness day held within the school. Promotion of positivity about different disabilities. External charity group employed by school (wheelchair awareness) - charge for attendance boosted their charity funds.</b></p> <p><b>Drama performances by the students are attended by family members and members of the public. This raises the students' confidence and increases public acceptance of disability.</b></p> <p><b>Strong fundraising links have been established with members of the public. The links promote community engagement.</b></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		
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## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>£41,656 credit</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>Funds are retained to support the future purchase of large items e.g. new minibus and outdoor activity equipment</b>
Amount of reserves held	Para 1.22	<b>£41,656</b>
Reasons for holding zero reserves	Para 1.22	<b>N/A</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>N/A</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
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	<b>PTA model constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>Friends of the school</b>
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	<b>Election to post</b>

### 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	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

### Reference and Administrative details

Charity name	Welburn Hall School Home School Association
Other name the charity uses	N/A
Registered charity number	529656

Charity's principal address	Welburn Hall School Kirkbymoorside York YO62 7HQ

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Marianne Best	co-chair		
2	Evette Dadswell	co-chair		
3	Catherine McGill	treasurer		
4				
5				
6				
7				
8				
9				
10				
11				
12				
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14				
15				
16				
17				
18				
19				
20				

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

<b>Director name</b>		

Name of trustees holding title to property belonging to the charity

<b>Trustee name</b>	<b>Dates acted if not for whole year</b>	


## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
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)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A
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### Other optional information

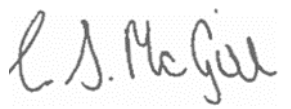
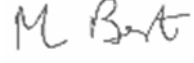
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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Catherine Susan McGill	Marianne Best
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Position (eg  
Secretary, Chair, etc)

Treasurer	Co-chair
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Date

19 January 2023
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CHARITY COMMISSION  
FOR ENGLAND AND WALES

Welburn Hall School Home School Association

No 529656

## Receipts and payments accounts

CC16a

For the period from	Period start date	To	Period end date
	06/04/2021		05/04/2022

### Section A Receipts and payments

	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 £
<b>A1 Receipts</b>					
Donations	22,348	-	-	22,348	442
Uniform Sales	-	-	-	-	-
Transport & Outgoings	-	-	-	-	-
Fundraising:	-	-	-	-	-
Garden Party	-	-	-	-	-
Other fundraising activities	7,503	-	-	7,503	-
Mis Receipts	1,000	-	-	1,000	-
Interest Received	4	-	-	4	5
<b>Sub total (Gross income for AR)</b>	<b>30,854</b>	<b>-</b>	<b>-</b>	<b>30,854</b>	<b>447</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>30,854</b>	<b>-</b>	<b>-</b>	<b>30,854</b>	<b>447</b>
<b>A3 Payments</b>					
Transport & Outings	-	-	-	-	-
Garden Party Costs	-	-	-	-	20
Donations to School	-	-	-	-	8,437
Other Payments	97	-	-	97	139
Other Fundraising Activities	578	-	-	578	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>675</b>	<b>-</b>	<b>-</b>	<b>675</b>	<b>8,596</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>675</b>	<b>-</b>	<b>-</b>	<b>675</b>	<b>8,596</b>
<b>Net of receipts/(payments)</b>	<b>30,179</b>	<b>-</b>	<b>-</b>	<b>30,179</b>	<b>- 8,149</b>
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	11,477	-	-	11,477	19,626
<b>Cash funds this year end</b>	<b>41,656</b>	<b>-</b>	<b>-</b>	<b>41,656</b>	<b>11,477</b>

## 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 £
<b>B1 Cash funds</b>	CAF Current Account	4,017	-	-
	CAF Gold Account	37,638	-	-
		-	-	-
	<b>Total cash funds</b>	<b>41,656</b>	<b>-</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	<b>Details</b>	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	<b>Details</b>	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	<b>Details</b>	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	<b>Details</b>	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	



**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

Welburn Hall School Home School Association

**On accounts for the year  
ended**

5 April 2022

**Charity no  
(if any)**

529656

**Set out on pages**

3-4

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 5 April 2022

**Responsibilities and  
basis of report**

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").

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.

**Independent  
examiner's statement**

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:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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.

**Signed:**

[Signature box]

**Date:**

02/01/2023

**Name:**

Joanne Jackson

**Relevant professional  
qualification(s) or body  
(if any):**

[Qualification box]

**Address:**

71 Abbots Garth, Seamer, Scarborough, YO12 4QN

[Address continuation boxes]

**Section B**

**Disclosure**

**Give here brief details of any items that the examiner wishes to disclose.**

N/A