

Roseburn School Parent Teacher Association

Business Plan 2018-2021

Date	Revised By	Summary
3rd Oct 2018	Fiona Knops	Initial Version

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1: Executive summary

Roseburn School Parent Teacher Association (PTA) has been set up to support and advance the education, social development and well being of pupils attending Roseburn Primary School.

During the next 12 months we will register Roseburn School PTA as a charity and gain recognition from HMRC to enable the pursuit of new and exciting fundraising opportunities over the next 3 years. With these additional funds we will look to, upgrade Information and Communication Technology (ICT) within the school, make improvements/repairs to the school playground, and continue to support activities the children already enjoy and benefit from.

2: Organisation Details

2.1: Charity Name: Roseburn School Parent Teacher Association (PTA)

2.2: Address: Roseburn Primary School
64 Roseburn Street
Edinburgh
EH12 5PL

2.3: Telephone Number: 0131 337 6096

2.4: E-mail: roseburnpta@yahoo.co.uk

2.5: Website: Roseburn Primary School, PTA page: <https://roseburnprimary.wordpress.com/2017/01/31/roseburn-pta/>

2.6: Legal Status: Unincorporated association
Registered Scottish Charity No: To be Confirmed

3: What the Organisation Does

3.1: Our Vision

To support and advance the education, social development and wellbeing of pupils attending Roseburn Primary School.

3.2: Our Activities

Over the school calendar year Roseburn School PTA run a variety of different charity fundraising events to help raise funds for the benefit of the education, social development and wellbeing of the pupils.

Events take the form of Spring and Christmas fairs, which offer a variety of activities for children and parents to participate in. Other events include a Cheese & Wine evening, Parent Disco, with our additional family events being a Ceilidh and Beetle Drive. Further funds are raised via Easy Fundraising and matched funding.

These activities allow the Roseburn School PTA to pay for in full or subsidise a number of events for the children. These include: Halloween Party, P7 Leavers Disco, P5/6 disco, Theatre/Panto Trip, Football Club and the Choir.

In 2018, the PTA presented a cheque to the school for £5,274.

£1,290 was used to purchase ICT visualisers for each of the classrooms. This now allows teachers to more easily demonstrate skills to the class as a whole, saves time and money on printing materials, and allows for the inclusion of a number of different resources in lesson plans.

£3,984 of the funds donated were used on Mathematics materials for use in each of the classrooms. This funding also paid for teacher training on the use of the new material.

4: Our Goals

4.1: 2018 – 2019

For the next year our fundraising activities will continue and increase.

Our target for the coming year is £10,000.

Over the next 12 months, ICT within the school will be improved, replacing old iPad 2's, 15 of which are already obsolete.

Funds will be used to purchase headphones for use in each of the 11 classes, in order that iPads can be used during lessons without disruption to others.

Broken playground equipment will be removed and replacement benches put in place.

Remaining funds will be used to define a clear ICT programme for the school. The scope of which will look to support/enhance the existing coding clubs, as well as proposing how other technology education programmes can be introduced e.g. Lego Mindstorms.

4.2: 2019 – 2021

Over the longer term, it is the intention to investigate potential grants available as a result of obtaining charitable status.

Additional funding would allow for the purchase of further iPads for each of the 11 classrooms, ensuring that there is a minimum of 5 iPads per classroom.

However the main long term goal of the PTA, is to repair and develop the playground creating a stimulating and exciting play space for the children to help maximise their time spent out of the classroom. Existing equipment is 5 - 10 years old and in varying states of repair.

See section 9 – Fundraising Strategy for other ways we intend to maximise our charitable status for this purpose. We will also continue with our support of existing activities and other potential areas of need which will arise during the next 3 years.

5: The Public Benefit Need

The main purpose of Roseburn School PTA is to engage in activities which support and advance the education, social development and well being of all pupils and future pupils attending Roseburn Primary School.

6: Accounting & Reporting

Our accounting year runs from 1 May to 30 April. The Treasurer is responsible for keeping accurate records of the financial transactions of the Association and accounts will be drawn up and reviewed each year by an independent examiner.

With Charitable status the Treasurer along with the other Trustees will ensure correct reporting and accounting to OSCR - including full accounts, a Trustees Annual Report, a signature of one of the Charity Trustees on behalf of the other Trustees, the Scottish Charity number and comparative figures for the previous period.

For HMRC – complete Charity Application form to get HMRC recognition for our Charity. The Treasurer along with the other Trustees will submit the relevant forms to HMRC each year in compliance with the guidelines. It is unlikely in the next year we will exceed £25,000 which will require additional reporting. This will be reviewed on an annual basis.

Accounts will be shared at the AGM every September and accounts will be available.

7: Promotion and Advertising

In line with charitable rules our charitable status will be on all Roseburn School PTA correspondence, including emails and newsletters. We will also update correspondence with HMRC registration once it has been applied for and gained.

The Roseburn PTA website already holds the majority of relevant documents including the constitution, information about the PTA, meeting agendas & minutes. Once required, PTA accounts will also be available on this page.

During 2018, additional information will be added to this webpage, providing an overview of coming events, funds raised at past events and details of how funds raised will be spent to benefit the children.

8: Running the Organisation

8.1: Board of Trustees: Mrs Gwendoline Crerar
Dr Mindy Leow
Mrs Fiona Knops

8.2: Office Bearers: Chairperson – Mrs Gwendoline Crerar
Assistant Chairperson - Mrs Emily Preedy
Secretary – Dr Mindy Leow
Treasurer – Mrs Fiona Knops

8.3: Membership: – Membership shall be open to all school and nursery staff and the parents/guardians of pupils attending the school or nursery.

8.4: Committee: – the PTA will be a standing sub-committee of the Roseburn School Parent Partnership. The committee will consist of parents/guardians and school or nursery staff. The Office Bearers will consist of Chairperson, Vice Chairperson, Treasurer and Secretary. Office bearers will be elected on an annual basis at the Annual General Meeting. Retiring members will be eligible for re-election.

8.5: Finance: – the funds of Roseburn School PTA are lodged in a bank account in the name of the Association. The Treasurer is responsible for keeping accurate records of the financial transactions of the Association. Accounts are brought to balance on the last day of April and are reviewed by an independent examiner.

8.6: Reviews: – we will review Roseburn School PTA constitution every year at the AGM and any changes to the Charity will be reviewed at the same time. If there are significant changes, these will be communicated to OSCR – Scottish Charity Regulator.

9: Fundraising Strategy

Our business plan for the next 12 months will be to continue with our existing fund raising strategy while adding a few additional events where funds can be raised.

In the next 3 years with Charitable status and HMRC recognition we will continue with our existing strategy but will benefit from using the following:

Grants – our plan is to apply for Grants from various organisations to help with the extensive ICT upgrade and redevelopment of the playground.

Gift aid – when a UK tax payer makes a donation to a charity, they have already paid tax on that money. HMRC then allows the charity to claim back an amount equal to the tax paid by the donor on that money. We could claim back 25p for every £1 received as a qualifying donation.

Qualifying donations include – donations of money, donations of proceeds after an event, sponsored events, we might set up a MyDonate page for sponsored events & bucket collections – where donations are less than £20.

Easy fundraising – parents are encouraged to shop via the Easy Fundraising site. The companies which are involved will donate to Roseburn School PTA on qualifying purchases.

Matched donations – many employers will match an employees charitable activities and donations.

We will continue to evolve our Fundraising strategy over the next 3 years to gain maximum benefit for the pupils and future pupils of Roseburn Primary School.