

The Uphill Trust

Supporting Uphill Junior School in western Uganda

Scottish Charity: SC045385

Annual Report and Financial Statement

1 January 2019 to 31 December 2019



Trustees' Annual Report

1 January 2019 to 31 December 2019

The Trustees have pleasure in presenting their report together with the financial statements for the fifth year of operation of the Uphill Trust.

Reference and Administrative Information

Charity Name	The Uphill Trust
Charity Number	SC045385
Charity Status Awarded	29 January 2015
Charitable Purpose	The advancement of education
Registered Address	21 Strachan Crescent, Dollar, FK14 7HL
Trustees	N R L Macdonald (Chairman) B L Macdonald H E S Laird S A Macdonald C J Macdonald
Committee Member	A I Smith (elected 6 March 2015)

Structure, Governance and Management

The Uphill Trust is a Scottish Charitable Trust and all current trustees were named in the Trust Deed at the outset. Committee members can be elected to serve alongside the trustees, subject to a vote at any formal trust meeting. Currently there is only one formal management role, that of Chairman, but the other trustees and committee member are taking responsibility for administrative/management tasks dependant upon their expertise: website, newsletters & social media; promotional videos; minute taking & record keeping; accounting & financial records; legal advice; health & hygiene advice and fundraising. The Uphill Trust does not employ any staff and trustees are not reimbursed for their administrative activities. All other costs are covered personally by the trustees, making The Uphill Trust a zero overheads charity.

Objectives and Activities

Charitable Purposes

To advance education by securing the establishment and development of Uphill Junior School in rural Uganda. By providing financial support we are helping the School Management Committee to develop a permanent primary school and kindergarten for children aged 3-13 years in the village of Iruhuura, western Uganda.

School Background

Uphill Junior School (UJS) is located in an impoverished rural area and the fee income for the school is very low. Many of the families in the area are subsistence farmers with little or no income. Prior to The Uphill Trust's involvement staff were only paid intermittently and school facilities were very poor. When the trust was formed in 2015, UJS was teaching 196 children across 3 kindergarten year groups and 4 primary year groups in a temporary wooden building on rented land.

At the end of 2019 the school was teaching 344 pupils in 10 year groups on a permanent school site, and 9 Primary 7 pupils were able to sit the Ugandan National Primary Leavers Examination (PLE) at the start of November. During 2019, 29% of the school roll were orphans being educated for free, and a further 22% were from single parent families with reduced fees. This high level of charitable education provision has a significant impact on the fee income collected by the school, but offering education to everyone who needs it, no matter their means, is one of the school's key commitments.

Activities

The main focus of the charity is to raise money through a range of fundraising activities (see below).

We work closely alongside the school Director to support the development of the school through a mix of capital and short term projects. Three of the trustees visited the school in February and the Chairman visited the school again in November to monitor progress and agree the next stages in the school build project. Outside these visits, the trustees are in regular contact with the Director via email and web-based messaging services.

The trust provides funds to support the *day-to-day running* of the school (payment of teachers' salaries, provision of soap and disinfectant for hand washing and other cleaning needs) along with funding *capital projects* (construction of classrooms, latrines and other essential buildings) and *one-off activities* such as school trips for pupils and some cross-curricular activities. There is also a *Pupil Support Fund* to help severely disadvantaged children attend school. From time to time, when funding is available, trustees assist the school in gaining access to items that will enhance the quality of life for pupils, staff and/or the wider community.



Achievements and Performance

2019 - Capital Projects at UJS

- Upgrading the school track to allow safer access for delivery vehicles, cars and motorcycles
- Repainting inside the wooden classrooms prior to the start of the new academic year
- Construction of hardwood shelving in the offices and staff room of the Administration Block
- Construction of second latrine block for pupils, with sewage tank, washing area and disabled toilet stance
- Installation of water harvesting (1 x 5,000L water tank plus guttering and internal tap) for new latrine block
- Provision of additional metal-framed play equipment for kindergarten playground
- Construction of classroom block for Primary 3 and 4, including a large store room
- Installation of water harvesting system (2x 10,000L tanks plus guttering) for the P3/4 classroom
- Moving and rebuilding the wooden school kitchen
- Construction of class room block for Primary 1 and 2
- Installation of water harvesting system (2 x 10,000L tanks plus guttering) for the P1/2 classroom



School site in October 2019

2019 - Development & Maintenance Activities at UJS

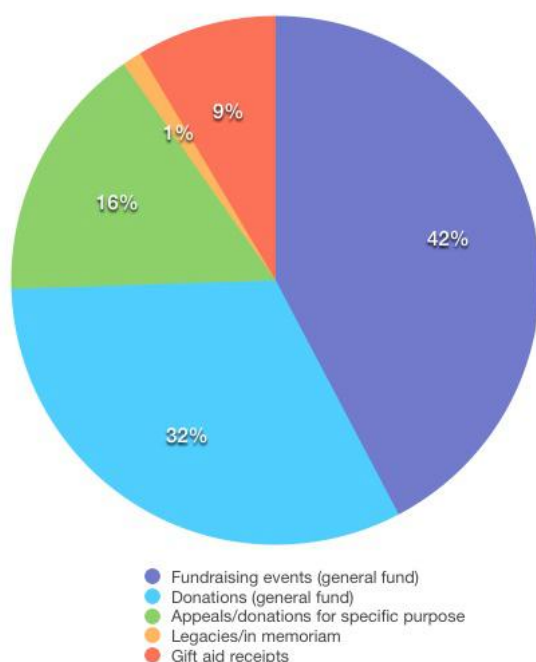
- Regular payment of staff salaries (13 full-time teachers, 1 bursar, 1 director, 1 school nurse)
- Medical supplies for the school nurse's room
- Funding for a Nutrition Assessment and Education programme led by a hospital Doctor from Fort Portal
- Funding for seeds and equipment for a vegetable garden at the school (pupil-run project)
- Transfer of donated educational resources/craft materials/school uniforms/footballs to UJS
- Donation of three treadle-powered sewing machines to the school
- Demonstration lessons in karate provided for upper primary pupils during February trustee visit
- Knitting lessons provided for interested pupils and staff during February trustee visit
- Funding for reading books for kindergarten and lower primary
- Continuing exchange of letters between Ugandan and British school children
- Pupil Support Fund assisted 13 children to attend school
- Financial assistance for school trip to Tooro Botanical Gardens in Fort Portal
- Transport plus musical equipments and costumes for school choir performance in Fort Portal
- Funding for 25 additional gowns for the kindergarten graduation ceremony

2019 - Trust Activities & Governance

- Submission of Annual Report to OSCR and upload onto trust website
- Gift aid claims x 3
- Online giving vehicles used for regular and one-off donations: Total Giving, Wonderful, Facebook Donate, PayPal Giving Fund, Don't Send Me A Card
- 'Donate for free' online shopping via: Give as you Live, Amazon Smile
- Range of fund-raising activities, including presentations to community groups, sponsored events, online appeals, informal craft sales and workshops, promotion of UJS-inspired children's book, community-based fundraising, networking in social and workplace environments, partnership with schools, and *in memoriam* donations
- Digital newsletters x 3; regular social media posts on Facebook, Twitter and Instagram
- Articles about fund-raising activities in local newspapers and magazines
- Uphill Trust policies - Financial Support for UJS (*revised*); Notifiable Events Policy; Safeguarding Children Policy; Fundraising Standards Policy; Financial Reserves Policy (*revised*) Communications Policy; Anti-Bribery Policy; Trustee Expenses Policy; Privacy Policy; Cookie Policy
- Trustee visits to Uganda x 2 to discuss school development plans and construction projects
- One trustee visited Iruhuura with the charity Dentaid and provided dental treatment/advice to UJS pupils
- Glasgow & Dundee Kiltwalks raised £5,089 in 2019
- Clean hands for Uphill appeal launched on Global Handwashing Day and continued as Christmas Appeal

Financial Review

Where our funds came from in 2019

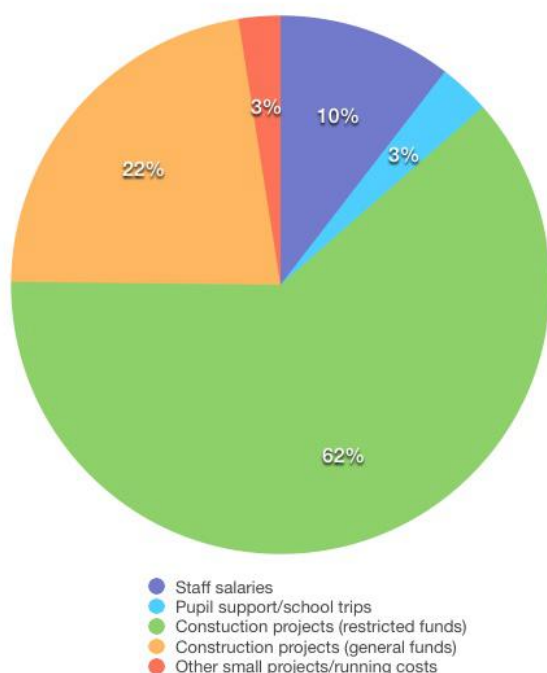


In 2019, 42% of our funds came from fundraising events and 32% was received as donations from individuals.

Appeal campaigns dedicated to particular projects raised 16% of our income, *in memoriam* donations generated a further 1% and the remaining 9% came from Gift Aid claims.

We currently receive sufficient funds each month to cover the agreed running costs for UJS (staff salaries, purchase of soap and disinfectant, and support funds for pupils) via regular donations and we are always seeking additional regular donors to future-proof this stable income flow.

How donations were disbursed in 2019



In 2019, 84% of the money transferred to UJS was spent on school build projects. This expenditure came from the restricted and general funds and included monies carried over from 2018.

Staff salaries accounted for 10% of trust expenditure and 3% was used to support sponsored pupils and to assist with school trips.

The remaining 3% was used to fund other small school projects, buildings maintenance and one-off expenses.

The Uphill Trust is a zero overheads charity. Expenditure on administration, marketing and travel to Uganda are all donated by the trustees from their own funds.

Expenditure in Uganda is supported by receipts and all capital projects have agreed budgets, giving the Uphill Trust a high level of accountability.

Reserves Policy

The financial reserve at the end of 2019 was £6,100 (based on the *Financial Reserves Policy: The Uphill Trust*). The sum of £5,100 - to cover specific elements of trust expenditure - was held in the restricted fund and an unrestricted reserve of £1,000 was set aside from general funds.

Plans for 2020

The Trustees will continue to pay staff salaries and occasional *ad hoc* running costs that cannot be met by the school fees collected by UJS (agreed on a case-by-case basis with the UJS Director).

Capital projects will be smaller in 2020 - we are aiming to complete the plastering and painting of the two new classroom blocks, extend the school electricity supply into these buildings and complete the water erosion management work for all the classroom blocks in the early part of the year. We are hoping to raise the funds needed for a permanent hand washing station for the school over the festive season. Construction of this resource should begin in the first half of 2020..

The school vegetable garden, started in 2019, will continue in 2020. This is an important co-curricular project that provides valuable life skills for the pupils, many of whom will rely on home-grown produce to feed themselves and their own families in future.

The final stages of the Nutrition Project, begun in 2019 in collaboration with a hospital doctor from Fort Portal, should be completed in the next academic year. A total of 297 children were assessed at UJS by Dr Jolly Banura and her colleagues in March/April 2019. Of these, 23 were found to be moderately malnourished, based on height and weight for age, plus mid-upper arm circumference measurements. The rest of the children were in the normal range but many were suffering from fungal skin infections, such as ringworm, and a number had poor personal hygiene. Follow-up activity will include educational sessions with the children's primary care givers, including cooking demonstrations using vegetables from the UJS garden project and information about the importance of good hygiene and cleanliness for a healthy life.

Following the visit to Iruhuura in October 2019 by a team from the charity DentaId, the trust hopes to initiate a program of regular toothbrushing at both UJS and Iruhuura Primary School (the local government-aided school). Information posters will be prominently displayed in both the schools, and staff training will be provided to support the program.

In 2016 the trust provided a medical-grade mosquito net, along with training in their care and use, to all the pupils at UJS. These nets have a life span of around 3 years and the 2019 Mosquito Net Appeal raised sufficient funds to provide replacement nets, along with a further educational session for pupils and primary caregivers at UJS. We hope this can be scheduled during the next trustee visit, in February 2020.

Fundraising in 2020 will continue to target capital projects. The School Build Appeal will be dedicated to the planning and construction of an Early Learning Centre (ELC) for the three kindergarten year groups at UJS. This is a big project and may take some years to fund. Land for the ELC was purchased in 2018 so we will be raising money to build classrooms and a staff room, and to secure the site with good quality fencing. The existing playground equipment will be relocated and extended once the ELC has been built.

The School Farm Appeal, launched at the end of 2018, will also remain active throughout 2020 to raise funds for a livestock farm on a site away from the school in a few years time. School farms are a popular device for generating additional income for rural schools in Uganda. Projects that will allow UJS to become self-sustaining in the future is now one of the key priorities of The Uphill Trust.

The Pupil Support Fund will continue to help some of the children in greatest need to attend UJS. The support includes uniforms, casual clothing and other personal needs, at least two meals a day at school, and the payment of school fees. Nineteen children will be supported in 2020: 10 girls and 9 boys.

General fundraising will continue, with an emphasis on expanding the list of regular donor to fund teacher salaries, along with continued support for the education of children with the greatest needs.

As in past years, the trust remains flexible to new projects and opportunities that may arise at UJS during 2020.

Three trustees will visit the school in February 2020 and the trust Chairman will make a second visit later in the year, if needed. These visits are paid for in full by the trustees and are essential for monitoring the progress of ongoing projects, and to allow liaison with the school and wider community about future development plans. The role of The Uphill Trust is to support UJS and trustees do not have a role in the management of the school.

Gallery: Some of The Uphill Trust's Achievements at Uphill Junior School in 2019

Under the leadership of school Director, Muhimbise Elius, and with the support of the Uphill Trust, Uphill Junior School is becoming one of the best regarded rural schools in the area. The whole school community regularly express their gratitude to the generous Uphill donors who have helped to make this possible



Upgraded track to the school from Iruhuura Trading Centre
(January 2019)



Karate lessons for the pupils in Primary 4-7, led by a visitor from the UK
(Trustee Visit, February 2019)



Knitting lessons for the pupils and staff, using donated wool and needles from the UK
(Trustee Visit, February 2019)



Second latrine block for the girls, with sewage tank and washroom, funded by Meeting Needs
(March 2019)



Supported children queuing for breakfast outside the wooden school kitchen
(February 2019)



Pupils being assessed for their nutritional status based on physical measurements for age
(March 2019)



Second set of metal framed swings for kindergarten playground
(April 2019)



Metal climbing frame with slide for kindergarten playground
(April 2019)



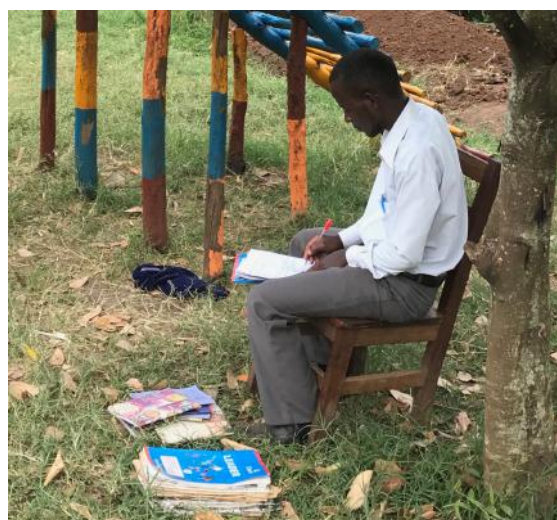
All the rooms in the administration block are now used regularly by staff and visitors



School Nurse demonstrating the safe storage of medicines in the school 'sick bay'



On dry days, teachers often do their marking under the shade of trees in the school grounds - this is the Head of Kindergarten



Upper primary teacher enjoying the shade of a tree at the end of the school day



**Veranda's are also popular work spaces:
Discussing school finances with the bursar**
(Trustee visit, February 2019)



**Some of the kindergarten and lower primary
reading books funded by a school in the UK**
(July 2019)



**Treadle sewing machines being put to good use
- the boys are especially keen to learn**
(July 2019)



**Teachers showing off some of the children's
clothes that the pupils have made**
(November 2019)



**School garden project - pupils look after
vegetables in the ground and in 'grow bags'**
(June 2019)



**Just look at those cabbages! Vegetables grown
in school are used in the school kitchen**
(June 2019)



Primary 3/4 classroom block, with store room and two large water tanks
(In use from July 2019)



Plastering and painting of the new classrooms will take place over the long school holiday
(December 2019/January 2020)



Primary 1/2 classroom block
(In use from November 2019)



Rain water harvesting tanks alongside the new lower primary block
(November 2019)



Whilst all the primary year groups are now 'out of the mud', kindergarten will remain in the wooden classrooms until funds are available to build the Uphill Early Learning Centre



Class of 2019 - 9 Uphill pupils left school to sit the Primary Leavers Examination
(November 2019)

Summary of Receipts and Payments for the year ending 31 December 2019

	Unrestricted Funds	Restricted Funds	Total funds current period
Receipts			
Donations	14,123	6,918	21,041
Fundraising activities	18,561	0	18,561
Legacies/in memoriam	0	526	526
Grants	0	0	0
Bank interest	51	0	51
Donated trustee expenses (<i>for gift aid</i>)	1,589	0	1,589
Gift aid receipts	3,756	0	3,756
Total receipts	38,080	7,444	45,524
Payments			
Money sent to Uphill Junior School	21,030	39,784	60,814
Trustee expenses (<i>donated back</i>)	1,589	0	1,589
Bank charges	60	0	60
Total payments	22,679	39,784	62,463
Surplus/deficit for the year	15,401	-32,340	-16,939

Statement of Balances - as at 31 December 2019

Opening balance in bank (<i>1 January 2018</i>)	50,751
Closing balance in bank (<i>31 December 2018</i>)	33,812
Surplus/deficit	-16,939

Notes to the accounts - for the year ending 31 December 2019

1. Basis of accounting

These accounts have been prepared on the Receipts & Payments basis in accordance the *Charities & Trustee Investment (Scotland) Act 2005* and the *Charities Accounts (Scotland) Regulations 2006*.

2. Nature and purpose of funds

Unrestricted funds are those that may be used at the discretion of the trustees to further the objects of the charity. The trustees maintain an unrestricted general fund to assist with the for day-to-day the running of UJS and other agreed school projects.

Restricted funds may only be used for specific purposes. Restrictions arise when specified by the donor or when funds are raised for a specific purpose. Restricted and unrestricted fund monies are held together within the common bank accounts but logged separately in the trust accounts.

During the accounting period 1 January to 31 December 2019 the trust held money raised in the following appeals as restricted funds: School Build Appeal, Mosquito Net Appeal (2019), Uphill Farm Appeal and the Clean Hands for Uphill appeal, along with money donated to the Pupil Support Fund and Alternative Gifts Fund. Residual monies from the Solar Lamp Grant (2015) and the Mosquito Net Appeal (2016) are also treated as restricted funds.

A large proportion of the money which had built up in both the unrestricted and restricted funds during previous years was spent on major building projects this year. We will continue to carry money into 2020 and beyond whilst we actively fundraise for our next construction project.

3. Expenses

In line with the *Trustees Expenses Policy: The Uphill Trust (2015)*, trustees do not claim expenses for day to day administrative activities or for attending trust meetings/training courses. The trustees may claim expenses for return air fares to Uganda and for Ugandan entry visa fees. In 2019, travel expenses were claimed by two trustees for air travel/visas and these expenses were donated back to trust in full as donations eligible for gift aid.

4. How money is held

All trust money is held in the bank, therefore there is no cash-in-hand balance.

Declaration

The Trustees declare that they have approved the Trustee's report above.

Signed on behalf of the charity's trustees:



N R L Macdonald
Chairman

Date: 16 January 2020



B L Macdonald
Trustee

Date: 16 January 2020