



# The Uphill Trust

*Supporting Uphill Junior School in western Uganda*

**Scottish Charity: SC045385**

## **Annual Report and Financial Statement**

1 January 2022 to 31 December 2022



## **Trustees' Annual Report**

The Trustees have pleasure in presenting their report and financial statements for the year 1 January to 31 December 2022.

### **Reference and Administrative Information**

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

### **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. There is only one formal management role, that of Chairman. The trustees take responsibility for administration and governance according to their areas of expertise: Website, newsletters & social media; preparing promotional videos; minutes & record keeping; accounting & finance; legal advice; health & hygiene; networking & fundraising. The Uphill Trust does not have any employees and the running costs of the charity are paid by the trustees - 100% of trust income is used to support projects in Uganda.

### **Objectives and Activities**

#### **Charitable Purposes**

To advance education by securing the establishment and development of Uphill Junior School (UJS) in western Uganda. By providing financial support we are helping the School Management Committee develop a well-respected primary school with kindergarten, for children aged 3-15 years, in Iruhuura - a small trading centre in the rural district of Kabarole.

#### **Uphill Junior School**

The school is located in an impoverished rural area and the collected fee income is very low. Many of the families are subsistence farmers with little or no money. Prior to The Uphill Trust's involvement, staff were paid intermittently and school facilities were very poor. At the end of 2014, UJS was teaching 196 children, across 3 kindergarten and 4 primary year groups, in a wooden building with earth floors on rented land.

In 2017, with our help, the school moved to a permanent, secure site and, since the end of 2019, all the primary pupils are taught in purpose-built brick classrooms with good quality latrines. The Uphill Kindergarten moved to a separate fenced-in site in 2021; the classrooms currently have wooden walls, shutters and doors, and stone floors. When money becomes available, permanent brick classrooms will be built.

In January 2022 UJS reopened to all year groups after the COVID pandemic and the school roll quickly returned to 300+ pupils, aged 3 to 18 years (the school had a number of older pupils in Primary 6 and 7 following the 2 year school lockdowns). The Uganda Primary Leaving Examinations (PLE) took place in November 2022 and 14 Primary 7 pupils left school to take the examinations.

The role of The Uphill Trust is to support UJS - Trustees do not have a role in the management of the school.

## **Activities**

The main focus of the charity is to raise money through a variety of fundraising activities. We work closely with the school director to support the development of the school and maintain regular contact via email and digital messaging. Trustees visit to the school in person 1-2 times a year to monitor developments.

The Trust supports the day-to-day running of the school and also provides funds for capital projects. The Pupil Support Fund helps severely disadvantaged children attend school. From time to time, when funding is available, additional support is provided to protect health and enhance the quality of life for pupils, staff and the wider community.



*Kindergarten pupils enjoying their new school site in 2022*

## **Achievements and Performance**

### *2022 - Capital Projects*

- Land with 8 room house purchased, for staff accommodation purposes (phased project)
- Staff house renovated with the help of grant funding from the Meeting Needs charity
- School boundary walls painted and signage added
- Foundations built for kitchen-hall building, followed by superstructure, roof, doors and windows
- Additional water harvesting tank installed next to administration block
- Kindergarten water harvesting tank replaced - broken tank to be fixed and re-used elsewhere
- Additional outdoor play equipment for kindergarten

### *2022- Development & Maintenance Activities*

- Face masks for all pupils, at start of school year
- Staff salaries (12 full-time teachers, 1 headteacher, 1 bursar, 1 director, 1 school nurse) - paid monthly
- Rent payments for teachers - school fee income unable to cover these In 2022
- Salary, rent and clinic costs for school nurse, funded by grant from Souter Charitable Trust
- 28 children attended school with help from the Pupil Support Fund



## ***The Uphill Trust: Annual Report 2022***

- Funding for sports team uniforms, shoes and equipment
- Uphill Porridge Club introduced to combat hunger - a hot meal in school for every child



- Donated laptops used in IT lessons for staff and upper primary pupils
- Holiday skills programme introduced for older pupils, followed by local sale of products
- Funding for PLE administration fees for Primary 7 pupils
- Menstrual pad workshop conducted with senior pupils during February trustee visit
- Whole school toothbrushing programme observed to be functioning well across all year groups
- Teacher training day funded at the start of the academic year

### ***2022 - Fundraising & Governance***

- 2021 Annual Report prepared, submitted to OSCR and uploaded to the trust website
- Gift Aid claims for online giving and direct-to-bank giving
- Online giving platforms: Total Giving, Facebook Donate, PayPal Giving Fund, Don't Send Me a Card
- Donate for Free online shopping sites: Give as you Live, Amazon Smile, e-Bay for Charity
- Walkers took part in the Dundee and Glasgow Kiltwalks, raising £9,900
- Business networking activities raised £7,800
- Online appeals for specific projects raised over £5,300 and included 2 sponsored events
- Successful grant application: Meeting Needs (£6,398 - phased payment - for staff house renovation)
- Website developed for UJS *pro bono* by a business networking colleague
- Digital newsletters x 5 plus regular social media posts on Facebook, Twitter, Instagram and LinkedIn
- Website blog posts x 10
- Uphill Trust policies reviewed and revised as necessary: Financial Support for UJS (*revised*), Anti-Bribery Policy, Trustee Expenses Policy, Communications Policy, Financial Reserves Policy (*revised*), Privacy Policy, Notifiable Events Policy, Safeguarding Children Policy (*revised*), Fundraising Standards Policy, Cookie Policy
- Trustees visited UJS twice in 2022 to monitor project development: 3 trustees in February and 1 in October



*Uphill Kiltwalk Teams in 2022*



**OSCR**

Scottish Charity Regulator

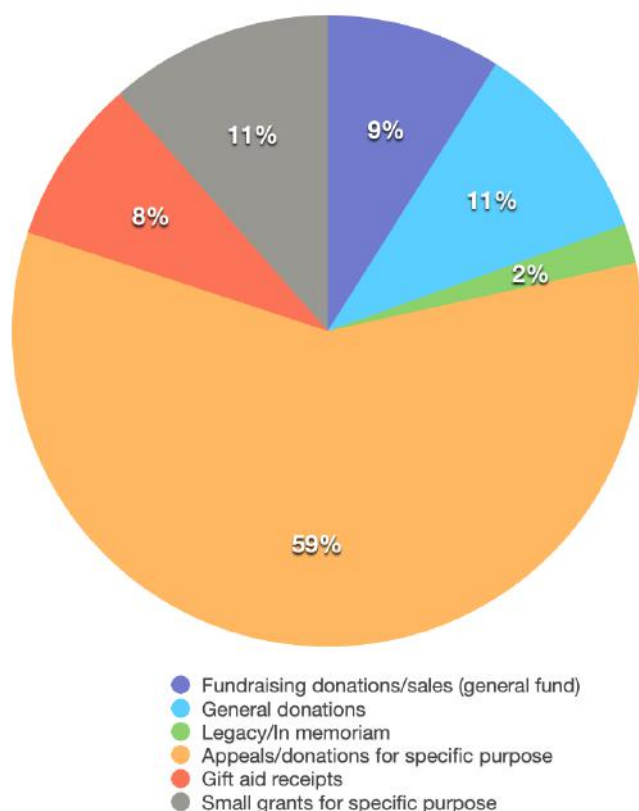
[www.oscr.org.uk](http://www.oscr.org.uk)

**Registered Charity**  
**SC045385**



## Financial Review

Where our funds came from in 2022

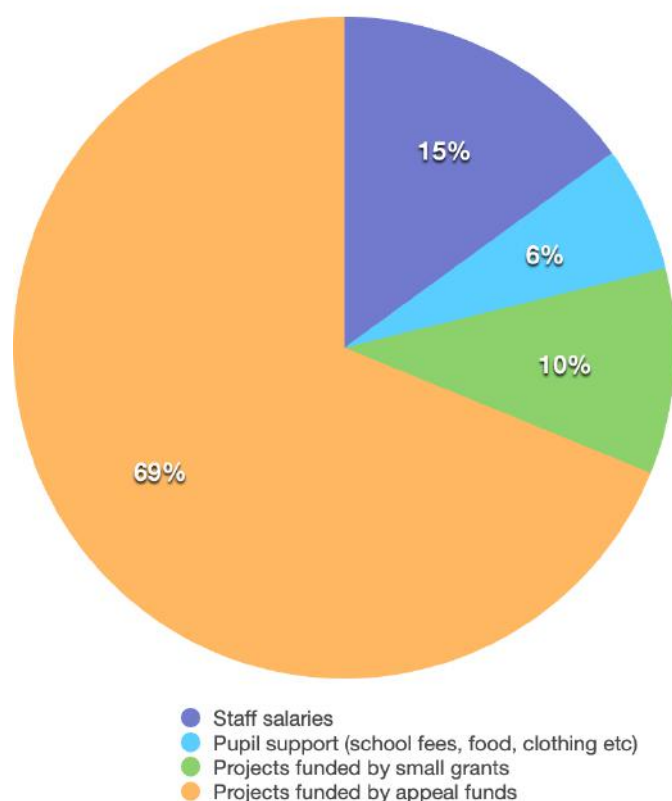


In 2022, the developing cost of living crisis in the UK began to affect fundraising income and this situation is likely to continue in 2023. Fundraising events and online appeals generated 59% of our income this year, and a further 9% was raised from general fundraising and sales of Ugandan crafts. General donations accounted for 11% of our income.

We were awarded one small grant for a specific project, which generated 11% of our income. A living legacy donation accounted for 2% of our total income and the remaining 8% of our income came from Gift Aid claims.

This year we were able to meet our share of the running costs for UJS: Staff salaries, purchase of soap & disinfectant, pupil support funding and the new school meal service, in addition to funding some capital projects. Our income came from a mix of regular donations, *ad hoc* donations and appeals. We continue to seek additional regular donors: Teacher salaries will be rising in again 2023, to offset steep food and fuel inflation in Uganda, and the school would like to offer financial support to more pupils.

How funds were spent in 2022



After concentrated fundraising for capital projects in 2021, we began spending on two new infrastructure projects in 2022, and introduced school meals for all pupils. This accounted for 69% of our expenditure.

Staff salaries made up 15% of trust expenditure and small grants funded 10% of our activities.

Helping some of the most disadvantaged children to attend UJS accounted for 6% of our spending.

Expenditure in Uganda is confirmed by receipts and the capital projects have detailed budgets, giving The Uphill Trust a high level of accountability.

The Uphill Trust is a zero overheads charity. Administration and marketing expenses for the charity are covered by the trustees.

## **Plans for 2023**

The trust will continue to pay staff salaries and *ad hoc* running costs for the school that cannot be met by school fee income (agreed in advance on a case-by-case basis with the UJS director).

We have funding to support 26 children when the school re-opens in February 2023. The Pupil Support Fund provides uniform, shoes, casual clothing, school supplies and other personal items, as needed, along with termly school fees for named pupils. It also funds projects that benefit a large number of children, such as the holiday skills workshops. One-off medical expenses, and other financial assistance for any child in the school, are considered on a case-by-case basis.

The Uphill Porridge Club, introduced in May 2022, will continue to feed all the pupils on every school day. Food prices increased sharply during 2022 but we have sufficient ring-fenced funds to cover project costs for 2023 and 2024.

Construction of a safe, hygienic school kitchen and multipurpose hall will continue into 2023. Further fundraising is required to pay for kitchen equipment, furniture for the hall and to complete internal decoration.

Renovation of the staff house began at the end of 2022 and we hope that 7-8 staff members will be able to move in at the start of the new academic year. The existing small latrine will be upgraded whilst we seek funding to build a larger latrine and washroom block. Funding will also be needed to progressively build two more blocks of staff rooms in 2023 and 2024. Developing the staff accommodation compound will save UJS money in rents to local landlords, as well as providing improved living conditions, and is part of the long term financial sustainability plans for the school.

The school vegetable garden, started in 2019, will continue in 2023. This important co-curricular project provides valuable life skills for UJS pupils, many of whom will rely on home-grown produce to feed themselves and their families in future.

Funds are in place for the installation of a mobile data-based internet service for the school. This is the first step towards digital access and connectivity, recommended by the Ugandan Ministry of Education for all places of learning. Initially the internet will only be used by staff - to access improved lesson planning ideas and Continued Professional Development programmes. We will help the school develop appropriate Digital Safeguarding policies during the course of the coming year.

Fundraising in 2023 will continue to target capital projects, along with increasing the number of regular donors for core funding - especially for teacher salaries and pupil support. The UJS staff receive a smaller stipend than recommended for teachers at government and private schools, however this is mitigated by several factors: Provision of housing and meals (paid for by the school using fee income); inclusive management structure involving the staff in decision making; an equal pay policy; regular and reliable salary payment dates (it is not uncommon for teachers in Uganda to receive no pay for months on end). All teaching staff will receive a pay rise of 50,000UGX per month in January 2023 to help offset the cost of living challenges.

The school development programme will continue to reflect the needs of the school and the recommendations of the school inspectors.

As in past years, the trust remains receptive to new projects and opportunities that may arise at UJS during 2023.

Three trustees will travel to Uganda at the end of January to review ongoing projects and discuss future developments for 2023 and beyond.

**Gallery: Some of The Uphill Trust's Achievements at Uphill Junior School in 2022**

Under the leadership of school director, Muhimbise Elius, and with the support of The Uphill Trust, UJS continues to be regarded as one of the top primary schools in Kabarole District. The whole school community regularly express their gratitude to the Uphill donors who have helped to make this possible.



**Items donated by UK donors**



**Pupils enjoy the new kindergarten classrooms**



**New play equipment for kindergarten**



**Some of the 28 pupils supported by UK donors**



**New sport kits is soon put to good use**



**Teachers have lessons too!**





**Kindergarten children enjoy a lesson on TV**



**Getting closer to 'One Book, One Child'**



**School Nurse is kept busy**



**Uphill teaching staff**



**Boundary walls with signage, at long last!**



**Land and house for staff accommodation**



**School boda-boda still essential transport**



**Foundations for the new kitchen-hall building**



## The Uphill Trust: Annual Report 2022



Spanish volunteer teachers spend time at UJS



Holiday skills programme in action



Another Spanish volunteer cooking for the staff

UPHILL JUNIOR SCHOOL													
END OF TERM TWO MARKLIST FOR P.7 ACADEMIC YEAR 2022													
NAME		SUBJECTS											
SN	ENG	GRA	MTC	GRA	SST	GRA	SCI	GRA	TOTAL	POS	AGG	DIV	
01	83	2	97	1	95	1	89	2	364	1 <sup>st</sup>	6	I	
02	76	3	92	1	87	2	85	2	340	2 <sup>nd</sup>	8	I	
03	87	4	85	2	78	3	58	4	298	3 <sup>rd</sup>	13	II	
04	67	4	80	2	76	3	70	3	293	4 <sup>th</sup>	12	I	
05	73	3	65	5	83	2	75	3	292	5 <sup>th</sup>	13	II	
06	73	3	72	3	77	3	48	4	290	6 <sup>th</sup>	13	II	
07	65	4	72	3	77	3	71	3	285	7 <sup>th</sup>	13	II	
08	64	5	78	3	69	4	62	5	273	8 <sup>th</sup>	17	II	
09	54	5	55	5	76	3	77	3	272	9 <sup>th</sup>	16	II	
10	73	3	67	4	76	3	48	7	264	10 <sup>th</sup>	17	II	
11	70	3	54	6	66	4	54	6	244	11 <sup>th</sup>	19	II	
12	62	4	53	6	65	4	56	5	238	12 <sup>th</sup>	20	II	
13	47	7	39	9	47	7	46	7	159	13 <sup>th</sup>	30	IV	
14	33	9	32	9	37	9	42	8	144	14 <sup>th</sup>	35	IV	

SUBJECT ANALYSIS													
SUBJECT	01	02	03	04	05	06	07	08	09	10	11	12	TOTAL
MTC	02	01	01	02	02	06	09	05	16				61
ENG	00	01	05	04	02	06	01	09	01	14			60
SST	01	02	06	02	06	06	01	08	01	14			63
SCI	00	02	04	02	02	01	02	01	01	14			30

GRADING ANALYSIS													
DIV I	DIV II	DIV III	DIV IV	DIV V	DIV X	TOTAL							
02	10	00	01	01	00	14							

Compiled by Tr. Emmanuel Natarinda, E-mail: [emmanuel.natarinda@uphilltrust.org](mailto:emmanuel.natarinda@uphilltrust.org)  
 Edited and printed by Uphill Junior School management Information System

New school management information system



More water storage for the school



Primary 7 leavers 2022



Kitchen-Hall Superstructure



Staff house renovations

**Summary of Accounts for the Year Ending 31 December 2022**

	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>Total funds current period</b>
<b>Receipts</b>			
Donations	5,247	18,546	23,793
Fundraising activities	4,441	10,439	14,880
Legacies/in memoriam	1,000	0	1000
Grants	0	5,699	5699
Bank interest	240	0	240
Donated trustee expenses	2,764	0	2,764
Gift aid receipts	4,212	0	4,212
Total receipts	17,904	34,684	52,588
<b>Payments</b>			
Money sent to Uphill Junior School	7,163	70,500	77,663
Trustee expenses	2,764	0	2,764
Bank charges	93	0	93
Total payments	10,020	70,500	80,520
<b>Surplus/deficit for the year</b>	<b>7,884</b>	<b>-35,816</b>	<b>-27,932</b>

**Statement of Balances on 31 December 2022**

Opening balance in bank accounts ( <i>1 January 2022</i> )	73,537
Closing balance in bank accounts ( <i>31 December 2022</i> )	<u>45,605</u>
<b>Surplus/deficit</b>	<b>-27,932</b>



## **Notes to the Accounts - for the Year Ending 31 December 2022**

### **1. Basis of Accounting**

These accounts have been prepared on a Receipts & Payments basis in accordance with 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 day-to-day 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 2022, restricted funds included money from various fundraising appeals: School Build Appeal, Uphill Farm Appeal, Teacher Appeal, Kitchen Appeal, Kindergarten Furniture Appeal & Pupil Support Fund.

Funds and grant money raised this year will be used to finance planned projects in 2023 and beyond.

### **3. Reserves Policy**

The financial reserve at the end of 2022 was £6,930 (based on the *Financial Reserves Policy: The Uphill Trust 2022*): £4,930 - covering specific elements of regular trust expenditure - was held as restricted funds and £2,000 in general funds were set aside to cover unexpected funding requests from UJS.

### **4. 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 2022 trustee expenses also included the COVID testing required before and during the trip at the start of the year.

### **5. How Money is Held**

All money is held in our bank accounts - 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 2023



B L Macdonald  
Trustee

Date: 16 January 2023