



Association of Teachers of Mathematics

**ANNUAL REPORT ON ACTIVITIES
YEAR ENDED
2007**

These reports were presented to the AGM at the
University of Keele, 3rd April 2007.

Association of Teachers of Mathematics
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ASSOCIATION OF TEACHERS OF MATHEMATICS

Year ending 31 December 2007

Honorary Secretary's Report

2007 proved to be a year of consolidation for the Association of Teachers of Mathematics. We have managed a whole year without any changes to the three key positions of Treasurer, Chair and Honorary Secretary.

Meetings took place in a regular cycle with the MA, NAMA, AMET and NANAMIC under the auspices of NCETM, who join us half way through the day to discuss areas of mutual interest to the associations and the NCETM, concerning teachers' professional development. We have continued to develop close working relationships with the MA and hope to continue to do so in the coming year. We are considering making joint funding applications to enable closer working in the future to build on our successful bid to write training materials for the professional development pack for the Bowland project, also with Nottingham University; and our unfortunately unsuccessful bid for the Every Child Counts project. Continuing the spirit of partnership AMET and ATM bid and were successful in obtaining funding from NCETM to run two courses for subject leaders.

Regular meetings have taken place with QCA and we have been consulted about the new version of the National Curriculum for Key Stages 3 and 4, new A-level syllabi, and functional mathematics. Diplomas still seem to be a bit of a mystery with the ground changing frequently and a lack of clarity about the mathematics content of the Diplomas. We have also been worried by the suggestion that A-levels might assume less importance in the scheme of things and one wonders where the mathematicians of the future are to come from. We have continued to be represented at JMC meetings by John Hibbs and we have valued his experience and expertise that makes him a valued member of GC. Finally, a member of the Secondary group attended the post-14 Advisory group meetings.

CMathTeach, this is the intended name for the Chartered Maths Teachers designation. The year saw many meetings between MA, NANAMIC, IMA and ATM to prepare the necessary paperwork for presentation in order that this designation to become reality.

September saw the launch of the CfSA (Council for Subject Associations) they have a remit from government to increase membership of subject associations. They take over from SAWG (Subject Associations Working Group). The first task of CfSA was to produce a journal for primary schools that included contributions from all the subject associations that are members. A final task of SAWG was to launch the Primary Project Box – this has been well received by primary schools.

General Council and Executive meetings continue to be very busy and at times exhilarating. The amount of work that comes into the association keeps council extremely busy, particularly requests for representation at various meetings.

The journal editors have maintained their high standard and the 'no longer new' journal has become a worthy successor to its two forerunners. It is an extremely good read and provides a professional forum in which members can share their practice. On behalf of General Council I would like to thank the editorial team for all they have done on behalf of ATM, in this year when we have begun the process of appointing new editors for MT with MM.

Marten Gallagher, our web editor, continues to develop the site and we were extremely pleased with a recent review in *Learning and Teaching Update* that suggested that this is a web site that every mathematics teacher should have as their front page. Marten continues to delight us with new ideas for the web site and works tirelessly on behalf of the association. This year has seen the beginning of an initiative started by Geoff Faux to put an archive of mathematics film onto the web site.

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We are lucky to be extremely well supported by the office staff, ably led by Su Strange. Staff members have continued to be committed and dedicated to the organisation, taking on whatever roles are demanded of them. All staff members are unfailingly helpful whenever they are contacted and I would like to thank each of them individually: Karen Kirkley for taking the lead on all matters concerned with the conference, she is efficient and positive; Karen Moran for her work with both the publications and the marketing groups and her smiling face at conference on the book stall; Fay, who deals with membership and is unfailingly cheerful when you contact her; Liam who has taken on responsibility for accounts and is fast becoming indispensable to the office; and finally Su whose talent is indisputable and who leads the office with a cheerfulness that is infectious and a capability that is astonishing. She manages to keep the Council in order and on track.

Margaret Jones
Acting Honorary Secretary

Trustees

The members of the Council deemed to be trustees during the year (or date of appointment) were as follows:

	Appointed	Resigned		Appointed	Resigned
P Alexander	16/04/2003		J Ingram	11/04/2006	
C Beckett	04/04/2007		K Gladwin	04/04/2002	04/04/2007
J Carnall	04/04/2007		H Vappula	16/04/2003	
D Cobden	19/04/2002	04/04/2007	J Hibbs	07/04/2004	
D Cochrane	04/04/2002	04/04/2007	S Johnston Wilder	07/04/2004	
M Jones	16/04/2003		J Croft	04/04/2007	
M Ollerton	16/04/2003		J Mansergh	07/04/2004	
A Parish	11/04/2006		P Hall	04/04/2007	
A McEachran	04/04/2007		M Hargreaves	Co-opted 13/10/2007	
S Pope	Co-opted 15/07/2005	04/04/2007	M Rodd	Co-opted 13/10/2007	
K Wintle	Co-opted 13/5/2007		R Davies	Co-opted 13/10/2007	

Company Secretary: Hanna Vappula
Treasurer: Alison Parish
Honorary Secretary: Margaret Jones

Auditors: Johnson Tidsall Chartered Accountants, 81 Burton Road, Derby, DE1 2DH

Solicitors: Taylor, Simpson & Mosely, 32 St Mary's Gate, Derby, DE1 3JW

ASSOCIATION OF TEACHERS OF MATHEMATICS

Trustees Report for the purpose of S45 of the Charities Act 1993 and Directors Report for the purposes of S243 of the Companies Act 1985

Year Ended 31 December 2007

ACHIEVEMENTS AND PERFORMANCE

- Revised membership categories to better reflect members needs, including a new category of membership: E-membership
- A successful year for the combined journal 'Mathematics Teaching incorporating Micromath'
- A revised website with a personal members only area, new members forum for discussion and sharing.
- On-line ordering and payment in place.
- A successful conference at Loughborough University.
- Professional development courses run across the country, (including Becta Road shows run in conjunction with The Mathematical Association and SETNET).
- New publications released, 'Getting Started with Geometers Sketchpad', 'Getting Started with Cabri', 'Getting Started with Geogebra', 'It Makes you Think', 'Thinking for Ourselves' in book format. In addition 'Grid algebra' and 'Surrounded' software have now been released.
- Continued development of software – Grid Algebra and 'L'.
- Continuation and development of collaborative working with the Mathematical Association and other Associations
- Representing mathematics education on national bodies, for example the Joint Mathematical Council and The Subject Associations Working Group, which now has a joint website www.subjectassociation.org.
- Being invited to take part in consultations relating to the proposed changes to the curriculum at all key stages.
- Courses have been developed and taken place for Subject Leaders, one has been held at Kings College and one at Warwick University.
- There has been an increase in bidding activity and we have been successful in gaining funding from Bowland Charitable Trust and the Cloth Workers Guild for development of Key Stage 3 materials for students and teachers. The quilting bid made the second round of Bowland and is now being developed with finance from the Clothworkers Guild with the aim of being a web based publication.
- We made a very good bid, which reached the final stage, to ECC initiative for Every Child Matters with Warwick, Bath Spa Universities and the Mathematical Association.
- We are now able to release the SMILE materials following negotiations with The Royal Borough of Kensington and Chelsea.
- Some of the Gattengo videos are now available on the Web.

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FINANCIAL REVIEW

Treasurer's Report

The General Council has met three times and the Executive three times this year. At each meeting the Treasurer has reported on the finances of the Association, which have then been discussed and reviewed by all present.

The office staff, especially Su Strange, have continued to offer substantial support in regard to managing the finances of the Association both on a day to day and a long-term basis. There has been close liaison between the office and the Executive Committee, particularly with the treasurer, regarding the day-to-day finances of the Association. This is particularly important for continuity as the Treasurer changes according to the General Council rules for executive membership.

The financial position of the Association continues to be closely monitored by General Council and ways have been considered to increase membership and support the sales of resources, which raise the profile of the Association in the mathematics education world. We have now introduced the option of e-membership and are working with other companies and organisations to increase our profile, and income from publications. We have also continued to look at ways of reducing costs of our publications and journals without a reduction in quality. Some of these have already been implemented. We have also begun to investigate the use of using more internet-based communication rather than having all face-to-face meetings.

This year the sales of software did not meet our expectations and we have therefore set a budget for the coming year with this in mind. New publications and software will be considered for suitability to a wider market than teachers in schools. We entered bids for Bowland KS3 initiative, two of which (quilts and trebuchets) went through to the second stage. Although not adopted for the final round they have enabled us to develop ideas for future publications with this market in mind. The full time post of professional officer will not be replaced in the short term, and members of ATM will continue to cover the role where it is feasible to do so.

Payment to Trustees

The Charities Act 2006 does not allow trustees to be paid for being trustees. Voluntary trusteeship still remains a key principle of the charity. However changes in legislation now mean that payments can be paid to trustees for work carried out with the proviso that the number of trustees receiving payment in this way must be in a minority. The Act allows trustees to pay an individual trustee for providing an additional service to the charity if they think it is the best interests of the charity. The trustee should be paid at an advantageous rate for the charity or it can be demonstrated that the trustee is able to deliver a better service than the charity could get elsewhere. The amount paid must be reasonable and set out in a written agreement between the trustee and the charity.

Investment Powers and Policy

The General Council has considered the most appropriate policy for investing funds and found that fixed-bid accounts (for one month) and one-year fixed bonds meet their requirement for capital growth. The average return on these investments for the year of 4.5% (2006: 3.7%) is considered low but there is a constant review of the investment policy, at all times, to maximise available returns.

Reserves Policy

The General Council has established a reserves policy whereby the unrestricted funds not committed or invested in tangible fixed assets (the free reserves) held by the Association should be between 3 and 6 months of the resources expended, which equates to £92,000 to £184,000 in general funds. At this level, the General Council feels that they would be able

to continue the current activities of the Association in the event of a significant drop in funding. At present free reserves, which amount to £137,234, are within this target level and allow the Association to maintain the improved services provided this financial year.

Results

The surplus for the year amounted to £63,108 (2006: deficit £32,674) of which £62,797 relates to restricted funds (2006: £5,743)

PLANS FOR FUTURE PERIODS

A conservative budget has been set for the year 2008 by undertaking a cost evaluation exercise in all aspects of the Association. All task groups' budgets have been set with lower sales in mind as last year's expectations were not realised, especially with respect to software sales. Task groups have been asked to keep within their budgets as they did last year, and funding for one working groups other than those taking place at General Council weekends has been included.

We will continue to investigate other groups and markets which might be interested in our products and continue to explore cheaper ways of publishing materials to keep costs down. We have rationalised our catalogue and have introduced e-membership. We have had grants from Bowland Charitable Trust and the Cloth Workers Guild to help us develop resources for teachers.

The Association will also continue work with British Educational Communications and Technology Agency (Becta) to promote ICT-related CPD and continue to offer other CPD via its annual conference and smaller regional events.

Statement of Financial Activities (including Income and Expenditure)
Year ended 31 December 2007

	2007	2006
	£	£
Incoming Resources		
Incoming resources from generated funds		
Voluntary Income - Donations	4,310	8,230
Activities for generating Funds		
- <i>Subscriptions</i>	189,909	188,292
- <i>Advertising & Royalties</i>	5,466	5,180
Investment Income	6,825	5,617
Incoming resources from charitable activities		
- <i>Grants</i>	78,854	
- <i>Sales of Publications, software and teaching aids</i>	75,236	94,889
- <i>Conferences</i>	69,845	50,118
- <i>Professional Services</i>	7,492	
- <i>Professional Office</i>	-	28,694
Other Incoming resources	974	1,839
TOTAL INCOMING RESOURCES	438,911	382,859
 Resources Expended		
Cost of Generating Funds:		
- <i>Subscriptions & Journals</i>	140,935	162,910
Charitable Activities		
- <i>Grants</i>	16,042	
- <i>Publications, Software and Teaching Aids</i>	104,326	111,535
- <i>Conferences</i>	79,262	59,838
- <i>Professional Services</i>	10,458	
- <i>Professional Officer</i>	-	55,185
Governance costs	24,312	26,312
TOTAL RESOURCES EXPENDED	375,335	415,780
Net incoming/(outgoing) Resources	63,576	-32,921
Gain/Loss on revaluation of investments	-468	247
NET MOVEMENTS IN FUNDS	63,108	-32,674
TOTAL FUNDS AT 1 JANUARY 2007	149,022	181,696
 TOTAL FUNDS AT 31 DECEMBER 2007	212,130	149,022

Balance sheet Year Ended 31 December 2007

	2007	2006
	£	£
Fixed Assets		
Tangible Assets	6,356	16,291
Investments	135,795	98,672
	<hr/>	<hr/>
	142,151	114,963
Current Assets		
Stocks	51,326	56,919
Debtors	6,2093	28,721
Cash at bank and in hand	22,468	26,662
	<hr/>	<hr/>
	135,887	112,302
Creditors: amounts falling due in one year	-65,908	-78,243
	<hr/>	<hr/>
Net Current Assets	69,979	34,059
	<hr/>	<hr/>
Net Assets	212,130	149,022
	<hr/> <hr/>	<hr/> <hr/>
Unrestricted Funds		
General Funds	144,790	143,279
Restricted Funds	67,340	5,743
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Total Funds	212,130	149,022
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Notes to the Financial Statement Year Ended 31 December 2007

Total Resources Expenses	Grants	Subs/Journal	Publication/software	Conference	Governance	Professional Services	Total 2007	Total 2006
							£	£
Mathematics Teaching		61763				-	61763	80987
Publications Software			28810			-	28810	21770
Royalties payable			4378			-	4378	5907
Stock decrease/increase			5593			-	5593	15569
Advertising and Publicity		7287	5830	1458		-	14575	12915
Conference Expenses				50460		-	50460	28999
Wages and Salaries	1200	37332	26132	11200	17466	-	93330	94062
Rent and Rates		8997	8597	2399		-	19993	18982
Heat and Light		665	635	177		-	1477	1028
Telephone		437	418	116		-	971	1076
Insurance		1927	1841	514		-	4282	4698
Postage		3014	2880	803		-	6697	9162
Stationery		801	766	215		-	1782	1964
Photocopier		1161	1109	309		-	2579	4426
Repairs and Maintenance		4815	4603	1285		-	10703	11324
Meeting expenses		2491	2492	2286	3116	-	10385	12015
Professional Costs	14842						14842	-
Audit and Accountancy					3295	-	3295	3200
Computer Development		134	134	134		-	402	339
Training						-	-	771
Bank Charges		298	297	298		-	893	1832
Miscellaneous		529	529	529		-	1587	1275
Web Site Expenses		3902	3902	1951		-	9755	8530
Staff Pension Scheme		1306	1306	1307	435	-	4354	6953
Credit Card Charges		764	763	509		-	2036	2040
Bad Debts						-	-	-9
Depreciation		3312	3311	3312		-	9935	10519
Grants to Working Groups						-	-	261
Professional Officer/Services						10458	10458	55185
	16042	140935	104326	79262	24312	10458	375,335	415,780

Full copies of the Accounts are available free of charge upon request