Chuckery Education Support Trust

# Annual Report to Trustees
# From 1st January 2025 - 31st December 2025

**Charity Details**

(charity's name, registration number, address and trustee names)

**Name:** Chuckery Education Support Trust

**Registration Number:** 1200803

**Address:** C/O Chuckery Primary School
Lincoln Road
Walsall
WS1 2DZ

**Trustees:**

| | |
|---|---|
| Roland Roberts<br>Ex Officio Trustee – Chair of Cadmus Governing body | Gaye Martin<br>Co-opted Trustee – Community Trustee |
| Nicola Rudge<br>Ex Officio Trustee – Chair of Governors Chuckery Primary School | James Pearce<br>Ex Officio Trustee – Executive Headteacher – Chuckery Primary School |

**Charity Structure**

There will be up to 5 Trustees who will oversee the trust. The Trust must operate with a minimum of 3 Trustees.

The co-opted Trustees shall be appointed by the Trustees. The Community Trustee may be a parent of a child at the school or a person who lives or works in the area local to the school or who the Trustees consider has appropriate financial, legal, investment or other expertise which is relevant to the work of the Charity. Co-opted trustees shall serve for a term of up to four years which may be renewed for one or more further terms.

Where the title of an ex-officio Trustee is changed or no longer exists or a body or committee referred is defunct whether by operation of law or otherwise the Trustees may make such amendments as are required to enable the body of Trustees to continue to be administered by up to five individuals

One of the Trustees should be appointed to act as Chair. The Executive Headteacher of Chuckery Primary School will not be eligible for the role of Chair. The role of Secretary and Treasurer to the Trust will be delegated to the Senior Business Manager at Chuckery Primary School within the powers of delegation set out in the Chuckery Education Support Trust Deeds

Trustees will meet at least 3 times per year (termly) to:

- Review powers of delegation
- Consider funding requests and allocate resources

- Review spending
- Evaluate impact of spending
- Monitor investments and manage financial reserves
- Review Trustee membership
- Receive an annual external audit of Trust finances
- Ensure necessary documentation is provided to external agencies

The quorum of all meetings will be 3 and this excludes the Senior Business Manager of Chuckery Primary School who holds a non-voting role.

Decisions made by Trustees should be determined by a majority vote. However, one of the trustees must be a co-opted trustee and must have voted in favour of the resolutions passed. A resolution in writing signed by all the Trustees, whether contained in one or more documents, shall be as valid and effectual as if it had been passed at a meeting of the Trustees.

Any two Trustees may sign a document on behalf of the Trustees to give effect to a decision made by the Trustees.

Trustees may participate in or hold a meeting of the Trustees by means of conference telephone or similar communications equipment so that all persons participating in the meeting can hear each other. Participation by such means shall be deemed to constitute presence in person.

Trustees will delegate the role of Secretary of the Trust to The Finance and Facilities Manager of Chuckery Primary School within their powers of delegation as set out in the Chuckery Education Support Trust Deeds.

The Secretary will ensure minutes and records of all decisions made by Trustees are made, signed and kept. Records of meetings and decisions made by the Trust will be stored at Chuckery Primary School

**Charity Activities**
(its activities and objectives in the year)
During the period 1st January 2025 until 31st December 2025 the trust made payments totalling £60,000 to Chuckery Primary School. A further payment of £60,000 will made in January 2026.
The purpose of these payments was to enhance the social, emotional and academic learning experiences of the children attending the school by providing opportunities for them to spend time on and off the school site engaged in practical activities and experiences that consolidate and support their learning in the classroom.

Payments were made to:

- Cover maintenance and service costs of the school minibus
- Cover other transport costs to enable off site visits. e.g. fuel and parking
- Subsidies Residential visits
- Match school funding to employ a Curriculum Enhancement and Outdoor Learning Teacher
- Provide appropriate wet weather clothing and footwear
- Purchase resources for use in forest school

- Pay for entry to places visited (e.g. Space Centre Leicester)

**Achievements and Performance**
(Its achievements and performance, including reporting on its public benefit)
During year from 1st January – 31st December 2025, 458 children at Chuckery Primary School benefited from donations from the trust.

Every child attending the school as was able to access a range of curriculum enhancement activities beyond the classroom that supported their development socially, emotionally and academically. Each of these has been led by a qualified teacher with an expertise in learning beyond the classroom.

No charge was made for any of the experiences provided.

Activities included:

- Barry Island (Year 6)
- Mandir Baba Balak Nath – Hindu Life (Year 4)
- Forge Mill Farm – Farms (Reception)
- West Midlands Safari Park – On Safari (Year 1)
- National Memorial Arboretum – remembrance (Year 6)
- Forge Mill Farm – farms (Reception)
- Birches Valley – Map Reading (Year 2)
- Wolseley Bridge – Exploring Rivers (Year 4)
- Ackers Adventures – Outdoor Adventurous Activities (Year 5)
- Forest School Sessions (All year groups)
- Wolseley Bridge – Exploring Rivers (Y4)
- National Space Centre – Space (Year 5)
- Shrewsbury Prison – Crime and Punishment (Year 5)
- Shugborough Hall – What can you eat from your garden? (Year 3)
- Hednesford on the Train – Contrasting location (Year 1)
- Gur Nanak Gurdwara - Sikh Life (Year 1)

In addition, 2 residential experiences for Year 4 (Castleton) and Year 6 (Latches Wood) were made available and subsidised by the Trust

**Case Study**
**Year 4 Visits to Wolseley Bridge**
**Purpose**
Year 4 learn about rivers through their mini adventure ‘How does a river and the area around it change from source to mouth?’.
The National Curriculum for England states pupils should learn to identify

*‘. . . key topographical features (including hills, mountains, coasts and rivers), and land-use patterns; and understand how some of these aspects have changed over time.’*

The Outdoor Learning visit to complement the mini adventure was to the Wolseley Centre, which is a nature reserve run by Staffordshire Wildlife Trust. The centre has

car parking, toilets, a visitor centre and accessible footpaths. The centre is bordered by the River Trent which was the focus for our visits. The centre is ideal for fieldwork visits and indeed runs its own sessions for KS2 pupils for £10 per child with a minimum spend of £200.

The only river in Walsall is the river Tame which is heavily urbanised. Travelling to the River Trent and Wolseley showed pupils a natural river in a rural landscape, which they would then be able to compare to the local environment at Chuckery. Year 4 were taken in 5 trips over consecutive days using the school minibus. Pupils wore school waterproofs and wellies to allow for any weather. Lunches for pupils receiving free school meals were provided by the canteen.
Wolseley has a footpath which runs around the perimeter of the site which also borders the River Trent for some of the way. Our groups would stop at 'Kingfisher Point' to review learning and vocabulary and conduct a field sketch.
'Fieldwork – Children to experience the middle course of a river and to create an annotated sketch of a section of the river labelling with all key vocabulary.' Year 4 Mini Adventure - Rivers

Further along the walk is a section of riverbank which has formed a beach in an area of deposition. If water levels are low (a dynamic risk assessment would be taken each day) pupils can examine the riverbank and explore the bed of the river in the shallow beach in their wellies.
After lunch groups would then drive to Essex Bridge to compare a river and a canal and view the confluence of the Rivers Trent and Sow. Walking over the bridge provides a unique view of the river, its varying depths and makeup of the riverbed. Using the school's National Trust membership, we then enter the Shugborough estate to see the River Sow and conduct our knowledge review before returning to school.

**Impact**
The trip to and from Wolseley were, as ever, popular with the pupils as they spotted different features such as fields and then tried to work out what the animals in the fields were!
Our time at Wolseley started with the walk to the River Trent with regular stops to observe the wild birds at the centre such as mallard ducks, swans, moorhens, robins etc. We also identify and name various wild plants as well as the stream and lake. Pupils mostly thought the stream was a river and it wasn't until we reached the bank of the River Trent that pupils could compare the difference in size between a stream and a river. At Wolseley is a raised section of walkway which is ideal for observing the river and its features.

***"Mr Bamber showed us the parts of a river, it was my first time going to a river." A***

***'We didn't just learn about rivers in school, we went to see what one was like, and we learned there too.' H***

**'*It was fun seeing the parts of the river all around. We had done some learning in the classroom, and we saw what we had learned like the riverbank and meander.'* E**

This was also the location where pupils drew and labelled their own sketches of the river and its floodplain. We also then conducted a knowledge harvest of what pupils had observed and supplemented this with vocabulary cards from the mini adventure where needed.

***'We learned how and where the river had travelled, you showed us a map' R***

After the sketch maps we walked along the meander to a bird hide, and after a stop to observe the birds, we carried on to the top of the meander at Wolseley where there is a large beach area. Here we learned about the shape of the river and what the cross section is like. The large beach area gently leads into the river and around the zone of deposition the water is generally shallow allowing small groups of pupils to be able to enter the water to explore the riverbed under supervision.

'***You took us into the river and showed us the flow of the water. It was cold on my wellies. It was the first time I had ever been in a river! E***

***'We were able to stand in the river in our wellies. I didn't think we could do that! P***

***'We saw how the river was shallow at the bank and got deeper and faster on the other side' Z***

It is worth noting that very few of the Year 4 pupils had ever been to a river and even fewer had ever paddled in one.

**Conclusion**

The Year 4 visits to Wolseley Bridges had a profound impact on pupils' understanding of rivers and their surrounding environments. Experiencing the River Trent first hand transformed abstract classroom concepts into tangible learning, enabling pupils to identify key river features such as meanders, floodplains and zones of deposition with confidence. For many, this was their first encounter with a natural river and the opportunity to sketch, observe wildlife and even stand in the river created memorable, meaningful connections to their learning. Observing the rural River Trent deepened pupils' appreciation of how landscapes and waterways differ across regions. This high-quality outdoor learning experience not only reinforced curriculum objectives but also sparked curiosity, engagement and a sense of adventure; ensuring that pupils left with knowledge, vocabulary and real-world understanding that will stay with them long after the classroom lessons.

Outdoor geography education is an invaluable component of the curriculum because it bridges the gap between theoretical knowledge and real-world experience. When pupils step outside the classroom and engage directly with physical landscapes, they develop a deeper, more authentic understanding of geographical processes and features. Observing rivers, landforms, and ecosystems in situ fosters curiosity and critical thinking, allowing learners to connect abstract concepts - such as erosion, deposition and meanders - to tangible examples. These experiences also cultivate a sense of place and environmental stewardship, encouraging pupils to appreciate the complexity and beauty of natural systems. Ultimately, outdoor learning transforms

geography from a subject studied in books into a lived experience, making learning memorable, meaningful and impactful.

***'You should do this trip next year so the children can see the river and the flow and everything' A***

**Financial Review**
(a financial review including any debts and details of your reserves policy (if applicable) details of any funds held as a custodian trustee)

As of 1st December 2025, The Financial Position of the Charity was:

| **Institution** | **Balance Held** |
|---|---|
| Coop Bank | £4,860 |
| Natwest (Charity Bank) | £45,492 |
| Charles Stanley | £601,328 |

**Total of all financial assets - £651,680**

All the funds received by the charity were provided from a legacy donation. The final payment of this legacy has now been received. Any further future funds will be received solely from investment income

When setting up the Charity, the trustees agreed that the funds received should be in place to benefit the children at Chuckery Primary School over an extended period.

## Declarations

**The trustees declare that they have approved the trustees' report above.**
**Signed on behalf of the charity's trustees**

| | | |
|---|---|---|
| **Signature(s)** |  | |
| **Full name(s)** | James Pearce | 9th December 2025 |
| **Position (eg Secretary, Chair, etc)** | Trustee | |

## Chuckery Education Support Trust - Charity Bank

### Income

| | | |
|---|---|---|
| Transfer from Metro Account | £ | - |
| Transfer from COOP Account | £ | 30,000.00 |
| Transfer from School Account | £ | - |
| Interest | £ | 919.87 |
| | | |
| Total | £ | 30,919.87 |

### Expenditure

| | | |
|---|---|---|
| Transfer to Metro Account | £ | - |
| Transfer to Charity Account | £ | - |
| Transfer to School Account | £ | - |
| Resources | £ | - |
| Aduitor fee | £ | - |
| Total | £ | - |

| | | |
|---|---|---|
| Opening balance 06.04.25 | £ | 15,235.33 |
| Total income 25.26 | £ | 30,919.87 |
| Less total expenditure 24.25 | £ | - |
| Closing balance 25.03.25 | £ | 46,155.20 |

**Income**

| Statement | Transfer from Metro Account | Transfer from COOP Account | Transfer from School Account | Interest |
|---|---|---|---|---|
| June 25 | | | | £ 115.07 |
| | | £ 30,000.00 | | |
| Sept 25 | | | | £ 142.30 |
| Dec-25 | | | | £ 333.68 |
| Mar-25 | | | | £ 328.82 |
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| **Total** | **£ -** | **£ 30,000.00** | **£ -** | **£ 919.87** |

**Expenditure**

| Statement | Transfer to Metro Account | Transfer to COOP Account | Transfer to School Account | Resources | Aduitor fee | |
|---|---|---|---|---|---|---|
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| **Total** | **£** | **-** | **£** | **-** | **£** | **-** | **£** | **-** | **£** | **-** | **£** | **-** |

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|---|---|---|
| **Overall total** | £ | - |

**Cheque reconcilliation**

| Cheque number | Amount | Description | Statement cleared |
|---|---|---|---|
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | |
| | £ - | | |

Chuckery Education Support Trust - Coop

Income

| | | |
|---|---|---|
| Transfer from Metro Account | £ | 33,194.22 |
| Transfer from Charity Account | £ | - |
| Transfer from School Account | £ | - |
| From Solicitor | £ | 965.85 |
| | | |
| Total | £ | 34,160.07 |

Expenditure

| | | |
|---|---|---|
| Transfer to Metro Account | £ | - |
| Transfer to Charity Account | £ | 30,000.00 |
| Transfer to School Account | £ | - |
| Resources | £ | - |
| Auditor fee | | |
| Total | £ | 30,000.00 |

| | | |
|---|---|---|
| Opening balance 27.03.25 | £ | 700.00 |
| Total income 25.26 | £ | 34,160.07 |
| Less total expenditure 25.26 | £ | 30,000.00 |
| Closing balance | £ | 4,860.07 |

**Income**

| Statement | Transfer from Metro Account | Transfer from Charity Account | Transfer from School Account | From Solicitor |
|---|---|---|---|---|
| 6 | £ 33,194.22 | | | |
| Nov 25 | | | | £ 965.85 |
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|---|---|---|---|---|
| **Total** | **£ 33,194.22** | **£ -** | **£ -** | **£ 965.85** |

**Expenditure**

| Statement | Transfer to Metro Account | Transfer to Charity Account | Transfer to School Account | Resources | Auditor fee | |
|---|---|---|---|---|---|---|
| 5 | | | | | £ 100 | |
| 6 | | £ 30,000 | | | | |
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| **Total** | **£ -** | **£ 30,000** | **£ -** | **£ -** | **£ 100** | **£ -** |

**Overall total** £ 30,100.00

**Cheque reconcilliation**

| Cheque number | Amount | Description | Statement cleared |
|---|---|---|---|
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| | £ - | | |

## Chuckery Education Support Trust - Metro

### Income

| | | |
|---|---|---|
| Transfer from Metro Account | £ | - |
| Transfer from COOP Account | £ | - |
| Transfer from School Account | £ | - |
| Solicitor | £ | 33,170.50 |
| | | |
| Total | £ | 33,170.50 |

### Expenditure

| | | |
|---|---|---|
| Transfer to Metro Account | £ | - |
| Transfer to Charity Account | £ | - |
| Transfer to School Account | £ | 33,194.22 |
| Resources | £ | - |
| Adutior fee | £ | - |
| Total | £ | 33,194.22 |

| | | |
|---|---|---|
| Opening balance 01.04.25 | £ | 23.72 |
| Total income 25.26 | £ | 33,170.50 |
| Less total expenditure 25.26 | £ | 33,194.22 |
| Closing balance | £ | - |

**Income**

| Statement | Transfer from Metro Account | Transfer from COOP Account | Transfer from School Account | Solicitor |
|---|---|---|---|---|
| 56 | | | | £ 390.53 |
| 57 | | | | £ 32,779.97 |
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**Total** **£ - £ - £ - £ 33,170.50**

**Expenditure**

| Statement | Transfer to Metro Account | Transfer to COOP Account | Transfer to School Account | Resources | Adutior fee | |
|---|---|---|---|---|---|---|
| 57 | | £ 33,194 | | | | |
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|---|---|---|---|---|---|---|
| **Total** | **£ -** | **£ 33,194** | **£ -** | **£ -** | **£ -** | **£ -** |

**Overall total** £ 33,194.22

**Cheque reconcilliation**

| Cheque number | Amount | Description | Statement cleared |
|---|---|---|---|
| 800011 | £ 33,194.22 | Transfer to COOP account | 54 |
| | | | |
| | | | |
| | | | |
| | £ 33,194.22 | | |

**CHUCKERY CHARITY TRUST ACCOUNT**

**AUDITOR'S STATEMENT**

I have examined the receipts and payments (or income and expenditure) statements with the books and vouchers relating thereto and have obtained all the information and explanations needed. I certify that in my belief the receipts and payments statement gives a true and fair view of the transactions for the year ending 31st March 2026 according to the information and explanation given to me and shown by the books of the fund.

Signed ..... School Fund Auditor

Date 22/6/26

Relationship to school ...None.....

Accounting qualifications (only applicable, if turnover exceeds £20,000 a year)

...AAT Level 2.....