

THE RICHMOND SCHOOL TRUST

Annual Report for the Richmond School Trust
September 2024 – August 2025

Charity Number: 529619

Contact address: 55 Maison Dieu, Richmond North Yorkshire DL10 7AU

Trustees and Officers:

Annette Clark (Chair - co-opted); William Gedye (Treasurer – co-opted); Jacqui Walker (co-opted – Trustee Co-ordinator); Elaine Walton (co-opted); Clive World (co-opted); Trevor Cook (co-opted); Arte Dawson (co-opted – Deputy Chair); Nicola Wilson (co-opted parent representative - Deputy Treasurer); Stuart Parsons (NYC Councillor resigned March 2025); Paul Harrison (Richmond Town Councillor); Lorraine Hodgson (Richmond Town Councillor); ; Fergus Brown – (Resignation from Richmond Town Council May 2025); Ian Woods – Richmond Town Councillor joined Trust June 2025) Judy Hooton (Chair of Governors)

Structure, governance and management

The Trust is managed by the Board of Trustees, all of whom are volunteers, receiving no fees or emoluments for their services. There is currently a vacancy following the resignation of the North Yorkshire Councillor, due to the increasing workload following the restructuring of North Yorkshire County Council with a reduction of members. A resignation occurred from the Richmond Town Council, due to the fact that the member did not seek re-election and consequently could no longer sit as a Trustee. He was replaced by another elected member

The guiding strategic document for the Charity is its Scheme dated 29th December 1972 as amended on 7th July 2010 as amended by the scheme dated 23 August 2021 as amended by resolution, dated 10th March 2021.

The Objective of the Trust, as set out in the Scheme is to enable ‘the Trustees to apply such of the yearly net income sum, as they think fit in providing such benefits, of any kind not normally provided by the Department for Education (or other relevant funding authority), for students of the school, as may from time to time be agreed upon.’

Funding is awarded at the discretion of the Trustees and may be awarded to Richmond School’s current students and ex-students under 25 who are to continue their education and training. Funding is also given to staff whose applications meet criteria to support a range of students. Priority is given to those who are facing financial or other difficulties such as health conditions or other vulnerabilities.

Meetings are held 3 times a year with a Financial sub-committee to ensure best practice.

Achievements and performance

The year had seen further difficulties caused by the cost-of-living crisis as families struggled to make ends meet. This impacted on a wider group than those covered by pupil premium and free school meals. A number of students also suffered from mental health issues, which needed addressing and are not always available via the

NHS. Some of these issues are sadly still a result of the impact of Covid on some of the individual students. Cuts in funding for the school have also impinged on what can be offered to the students.

To meet our objectives, we worked to ensure that we had an understanding of the needs of the students primarily, supporting them with a clear understanding of the school's core values. The Trust is independent of Richmond School, but we continued to work closely with the school to ensure that the funds are targeted effectively and have a positive impact on the students.

We were able to spend £90,045 on grants over this period, a decrease of £48,973 from last year. It is recognised that the Trust needs to operate with careful management of the invested funds enabling us to continue to support the wide range of activities as outlined below in subsequent years.

Trustees agreed to continue to top up the Head Teacher's fund to £3,000 when needed. Over this financial period a total of £1,891 was paid into that fund. This is to support short term issues like emergency bus fares, shoes, food and uniform. The Head Teacher thanked the Trustees as this fund meant that there could be an immediate response to any issues.

We endeavoured to support the students and found that the categorisation has supported us when considering bids from individuals. We raised the profile among staff and students, so that applications have continued to grow. We have worked hard to ensure that we meet our target audience. The application form for staff was developed further to ensure that monies given met the Trust's requirements that funding went to those groups most in need.

During the school year, we continued to support current students for activities within school, amounting to £7,381. Priority is given to those who have financial needs and those vulnerable students who may have issues, for example, around SEND or mental health. Requests for those on PP or FSM varied from music lessons and exams, trips to CERN and France plus maths' tuition. It has made things possible which might otherwise have been impossible.

Two students have had help with music exams and lessons. Their mother responded *'Thanks you for your continued support. Music is definitely a central theme in our house!*

One request was funding towards the rental costs of a moped, from Wheels2Work to enable a student to get to the school due to there being no bus availability. Checks were made on health & safety and the needs of the family, before Trustees agreed to support this application.

We continue to support those students eligible, up to the age of 25, for the Brackenbury Award, totalling £13,000 this year. – an increased grant of up to £1,500 for those continuing with education and training at university, college of FE or

an apprenticeship. Funding was given to a rugby player training at a Sports Academy out of the County, for specialist training in cabinet making, for barbering tools for an apprentice in men's hairdressing and for a student coaching the local Lazercheer – cheerleading group; a laptop to support an architecture degree and support for those moving on to performing arts in courses at the Northern School of Contemporary Dance and Liverpool Institute of Performing Arts.

'Thank you – the award will definitely take a lot of weight off me and will mean I can really focus on my studies in the new year and not have to work as many hours to save up funds.'

'Balancing my university studies with coaching Lazer Cheer has been both challenging and rewarding and it means a lot to have my efforts acknowledged.'

'Thank you very much – the help will massively benefit me when moving to Leeds'. This student also was identified as being an 'exceptional role model *'especially to young boys at the school, as well as his amazing commitment and success in his chosen area of excellence, dance'*. Citation on receiving Governor's Cup.

There was an award of £100 to the Recipient of the Trustees' Award at the annual award ceremony at the school. The Trustee's Cup recipient was awarded the cup for her active leadership within the Sixth Form Community and her conscientious and dedicated commitment to excellence in the Performing Arts.

We have also supported students for their out of school activities – our financial contributions amounting to £13,733 for those taking part in external activities. Priority was given to those in need whether it was financial or other identified need, such as health/SEND. Of the total this group, identified as having need, accessed £10,733. This funding could be for elite practitioners to support the costs involved as their skills develop. £3,000 was awarded to this group. Due to the numbers of applications from elite students in such as music or sport, the amount awarded was reduced to £500. Trustees were impressed with the abilities shown by the students, achieving recognition at national level. The students engaged in a range of out of school activities such as dance, triathlon, archery, rugby, fees for a local theatre group, time in a recording studio, American football and cheerleading; athletic club membership, swimming, rugby league and girl's rugby7s.

'Thank you very much, I really appreciate the support'. This student got support towards the cost of developing his EPQ on the observation of how bullet shape effects 'gyroscopic stability and trajectory' - an interest in historical weapons moving on to develop skills in an area of physics.

An award for the cost of residential courses for a tuba player who had been accepted on to the National Youth Brass Band of Great Britain – this award resulted in his achieving the Katie Ogden prize for best tuba solo against 13 other players. *'Thanks so much for your support – he's really loving playing his tuba – contributing not only to the school ensembles but also to 3 other local orchestras'* – Student's father

A contribution was made towards the cost of a trombone with the student working to pay to raise the remaining funds – now a student at the Royal College of Music.

Support for 2 swimmers, originally from Ukraine – *Your grant is more than just financial aid – it is a beacon of hope a chance for them to grow and a reminder that kindness and solidarity can change lives – your support will help them move forward, both in sports and in life.*

Amputee Footballer – funded towards a trip to Romania - *He had the most wonderful time with some super football training. The event is getting bigger each year but the lovely thing is that the student has made several friends from other countries and they meet up each year and have all improved so much at their football! including children from Poland, Spain, France and even Costa Rica!* - Parent

Austria hosted the United World Games to which a service student was selected to represent the UK for the U16's Rugby 7s girls' tournament. The team were able to win a silver medal

Student selected for Great Britain's under '17's team for American Football – *'I am delighted to say GB won 32 – 23 – Thank you so much for the support'*. Parent

We had a range of staff bids which amounted to £53,140 being awarded. We continued to ensure that the Trust addresses needs across the school with particular attention to those students who are vulnerable in some way. Data on how many students would be from vulnerable groups is therefore requested. This includes those with financial issues, SEND, students with health issues, Service children, young carers, those with additional pastoral needs and those who are the first in the family to attend university. We also understand that there have been cuts to funding schools, so we have taken into consideration that some materials will not be available to school departments. We do not fund those things that are curriculum based, but those things that can add value to the student experience.

We continue to update funding for Chromebooks, which ensures that new students attending the school with identified needs get a Chromebook – it has been proven that it supports their progress particularly in accessing homework.

Trustees continue to support the Just Be project and request feedback from staff leadership on how this funding supports students within the school. Trustees contributed £25,000 enabling the input to increase from two to three days to extend the provision from Key Stage 4 & 6th form students to support in Key Stage 3. Two counsellors work in school with students averaging about 13 sessions. The main issues raised are around anxiety, family relations, self-esteem and relationships. All students who have accessed the support have improved attendance and

engagement with school, providing a real lifeline for students that is positively impacting their wellbeing and education.

Year on year there has been an increase in students presenting with mental health challenges that are not meeting the threshold for CAMHs. Trustees see that Just Be helps those students. All students who have accessed the support have improved attendance and engagement with school. Pastoral support is stretched in all schools and Just Be provides a real lifeline for students that is positively impacting their wellbeing and education. The end of the year survey results reflects the progress made in the pupils' own words.

'I learned how to make connections between the way I felt and why that may have been, linking my emotions and thoughts to recent events or situations; I feel more self-aware.'

'I was able to express myself and talk freely about all the problems I was facing and see a solution.'

These issues can be ongoing and discussion was held over the year on how the project could continue with a possibility of a reduction in funding.

Other bids that were supported were funding for coaches for such as Cern & the Brilliant Club; Breathwork providing emotional training to support students' wellbeing; Cheer equipment for the school based cheerleading group. Support was also requested for funding towards a Geography Year 12 trip, so ensuring that all those with financial need would be free; a Green Howard's Museum workshop run by the Collections Manager illustrating the links between Richmond School and World War 2; and a Holocaust Survivor Talk (Dr Martin Kapel) plus participation at a festival of Remembrance for Forces Children at Ripon Cathedral

The Trust has supported transport costs for a number of events including to Ripon Cathedral to participate in 'A festival of Remembrance for Forces' Children'.

'Richmond School was privileged to pay an important role in the Service, with our School Orchestra and Concert Band being requested to perform the music for the entire event.....two students also had the honour of performing the Last Post. No mean feat in front of such an audience and for such an important event.' Stephen Boyd – Head of Music

In the past year Trustees supported the new cheer and pom dance squads with outfits and poms. The two teams competed in Manchester in the national schools' cheer and pom championships and *'We won both categories! Some girls have SEND and some do not always 'get it right' in school, but had the chance to perform in school (following the win) enabling staff and peers to see them 'shine!'* Jamie Pemberton - Dance

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The Brilliant Club aims to increase the progression rates of students from under-represented backgrounds to highly-selective universities and to help them succeed once they arrive. 15 Year 12 students were able to take part in this activity allied with Durham University – all 15 passed the course. Les Richardson, Assistant Head Teacher, Sixth Form.

Financial Review

The Trust continued to invest with the Charities Ethical Investment Fund at the Churches, Charities & Local Authorities investment company (CCLA), based on our wish to invest in a high performing company with high ethical standards and investments. The fund remains in a healthy position, although we anticipate that future budgets will be significantly reduced. A total of grants paid was £90,045. The total assets at the end of the year, net of awards still to be paid, were £816,683.

We were therefore still in a position in supporting the school with funds up to £100,000. The financial position is checked annually to ensure that we allocate funding within our means to ensure the longevity of the funding available and budget set accordingly.

The accounts were examined by an Independent Examiner for the 12-month period, ending 31st August 2025, expressing there were no concerns.

Annette Clark
Richmond School Trust - Chair

The Richmond School Trust

Accounts For The Financial Year Ending - 31 August 2025

**The Finance Team
October 2025**

The Richmond School Trust

Statement of Financial Activities

Year Ending 31 August 2025

The Finance Team present their report and the unaudited financial statements of the charity for the year ended 31 August 2025

Reference and administrative details

Registered charity name The Richmond School Trust

Charity registration number 529619

Principal office

55 Maison Dieu
Richmond
North Yorkshire
DL10 7AU

The Richmond School Trust

Statement of Financial Activities

Year Ending 31 August 2025

	2024-2025	2023-2024
	Unrestricted Funds	Unrestricted Funds
Income and Endowments		
Investment Income	25,692	27,752
Deposit Account Interest	360	407
Total Income	<u><u>26,052</u></u>	<u><u>28,160</u></u>
Expenditure		
Expenditure on Charitable Activities	90,045	139,018
Administration & Bank Charges	1,373	1,386
Forward Commitments	21,543	45,026
Total Expenditure	<u><u>112,961</u></u>	<u><u>185,430</u></u>
Net gain on investments	(36,617)	85,312
Net income and net movement of funds	<u><u>(123,526)</u></u>	<u><u>(71,959)</u></u>
Reconciliation of funds		
Total funds brought forward	895,185	913,511
Grants brought Forward	45,026	53,634
Total funds carried forward	<u><u>816,683</u></u>	<u><u>895,185</u></u>

The statement of financial activities includes all gains and losses recognised in the year.
All income and expenditure derive from continuing activities.

The Richmond School Trust

Statement of Financial Activities

Year Ending 31 August 2025

	Note	2024-2025	2023-2024
Investments		£	£
Brought Forward		923,819	958,698
Gain/(Loss)		(36,817)	85,312
Purchase/(Sales)		(57,000)	(120,191)
Investments Carried Forward		830,202	923,819
Cash At Bank			
Current Account		6,375	6,555
Deposit Account Unity Trust Bank		1,542	9,733
Deposit Account CCLA		108	104
Creditors: amounts falling due within one year		21,543	45,026
Net Current Assets		(13,518)	(28,634)
Total Assets less current liabilities		<u>816,683</u>	<u>895,185</u>

Investments are all held in the Charities Ethical Investment Fund of the CCLA.

At the Trustees meeting on 18 November 2020 a resolution was agreed to recognise the 'Total Return Investment' Approach to Income from investments.	
	Investment Fund
Fixed Baseline Investment	630,000
Unallocated Total return	377,799
Total Fund at 18 November 2020	<u>1,007,799</u>

	Baseline	2023-2024	2023-2024*	Inflation	2024-25
Fixed Baseline Investment	630,000	630,000	750,000	28,500	778,500
Unallocated Total return	377,799	265,185	145,185	3.8%**	38,183
Total Fund	1,007,799	895,185	895,185		£816,683

* Readjusted baseline in line with inflation since November 2020

** Office for National Statistics Inflation 12 months to July 2025

These financial statements were approved by the board of trustees and authorised for issue on 26 November 2025 and are signed on behalf of the board by:

William E Gedye

William Gedye
Treasurer

15/10/25

Date

A. J. Clark

Annette Clark
Chair of The Trustees

26/10/25

Date

The Richmond School Trust

Examiners Report

Year Ending 31 August 2025

I report to the trustees on my examination of the financial statements of The Richmond School Trust ('the charity') for the 12 months ended 31 August 2024

Responsibilities and basis of report

As the trustees of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 ('the Act').


I report in respect of my examination of the charity's financial statements carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement


I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.


.....

Anne Young
Independent examiner


.....

Date

Period Ending 31 August 2025

1 General information

The charity is a public benefit entity and a registered charity in England and Wales and is unincorporated.

2 Statement of compliance

These financial statements have been prepared in compliance with FRS 102, 'The Financial Reporting Standard applicable in the UK and the Republic of Ireland', the Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (Charities SORP (FRS 102)) and the Charities Act 2011.

3 Accounting policies

Basis of preparation

The financial statements have been prepared on the historical cost basis.

The financial statements are prepared in sterling, which is the functional currency of the entity.

Going concern

There are no material uncertainties about the charity's ability to continue.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees to further any of the charity's purposes.

Investments

expenditure.

Total Return Investment

At the Trustees meeting on 18 November 2020 a resolution was agreed to recognise the 'Total Return Investment' Approach to investments.

The Richmond School Trust

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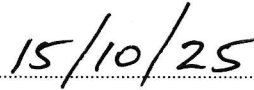
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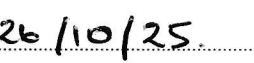
William Gedye
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Annette Clark
Chair of The Trustees



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The Richmond School Trust

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