

# THE FRIENDS OF APPLEFORD

England & Wales · Charity number 1010066

## Details

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**Status** Registered

**Legal form** Other

**Registered** 1992-03-25

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** Appleford School  
Elston  
Shrewton  
Salisbury  
SP3 4HL

**Phone** 01980621020

**Email** [secretary@appleford.wilts.sch.uk](mailto:secretary@appleford.wilts.sch.uk)

**Website** [www.applefordschool.org](http://www.applefordschool.org)

## Activities

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**Objects:** TO ADVANCE THE EDUCATION OF THE PUPILS IN THE SCHOOL.

**Activities:** Raising funds for Appleford School in order to provide facilities & support to pupils, teachers and parents.

## Classification

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- **How:** Makes Grants To Individuals, Provides Other Finance, Other Charitable Activities
- **What:** Education/training
- **Who:** Children/young People, People With Disabilities

## Geography

- **Area of benefit:** APPLEFORD, WILTSHIRE
- Dorset
- Hampshire
- Wiltshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-08-31	£16,147	£16,664	-	-
2024-08-31	£13,321	£751	-	-
2023-08-31	£12,112	£3,671	-	-
2022-08-31	£36,395	£33,649	-	-
2021-08-31	£21,454	£27,844	-	-
2020-08-31	£29,293	£9,442	-	-

## Trustees

Name	Role	Appointed
Kristina Penelope Scoble		2023-04-04
Michelle Moran		2025-03-18

**THE FRIENDS OF APPLEFORD**

England & Wales - Charity number 1010066

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# Accounts

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## Trustees' Annual Report for the period

From 31 August 2021  
August 2022

Period start date To 31  
Period end date

Charity name: The Friends of Appleford

Charity registration number: 1010066

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>To raise funds for Appleford school in order to provide facilities and support to pupils, teachers and parents. To promote dyslexia and special educational needs awareness.</b>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<b>To organise events like a Christmas fayre, Applefordian day, receptions and fundraising events.</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>The trustees have had regard to the guidance issued by the charity commission.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by	Para 1.38	

volunteers		
Other		

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<b>The charity has supported the development of an educational tool called The Listening Programme which was requested by our Occupational Therapists to help the children with independent thinking and focus. The charity was successful in obtaining a grant for £20,000 to purchase and install a new wooden outdoor classroom to support further both our forest school and lessons across the wider school.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		



## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p><b>The Friends of Appleford had an income of £36,395.11 and expenditure of £33,648.71 resulting in a net income of £2,746.40</b></p> <p><b>At August 2022, the net assets were £61,396.07</b></p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p><b>Reserves are held for the following reasons:</b></p> <ol style="list-style-type: none"> <li><b>1. To support a family with one terms school fee if their financial situation has changed temporarily</b></li> <li><b>2. To support a family financially if they struggle to pay for a specialist report</b></li> <li><b>3. Annual reoccurring events</b></li> <li><b>4. Agreed projects by the committee which have not been completed within the financial year</b></li> </ol>
Amount of reserves held	Para 1.22	<b>Reserved amount at 31 August 2022 is £28,133.45</b>
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	

Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	<b>Constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>Association</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>Trustees are elected by the committee members.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

### Reference and Administrative details

Charity name	The Friends of Appleford
Other name the charity uses	
Registered charity number	1010066

Charity's principal address	Appleford School Elston Shrewton Salisbury Wiltshire SP3 4HL

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Carolyn Shipstone	Trustee/Secretary		Friends of Appleford Committee
2	Anna Cathrine Dahlqvist Broome	Trustee/Treasurer		Friends of Appleford Committee
3	Camilla Newman	Trustee/Chairman		Friends of Appleford Committee
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**Corporate trustees - names of the directors at the date the report was approved**

<b>Director name</b>		

**Name of trustees holding title to property belonging to the charity**

<b>Trustee name</b>	<b>Dates acted if not for whole year</b>	



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

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### Other optional information

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

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Full name(s)

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Position (eg  
Secretary, Chair, etc)

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Date

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**FRIENDS OF APPLEFORD**  
**STATEMENT OF ACCOUNTS: 1 SEPTEMBER 2020 - 31 AUGUST 2022**

**PROFIT & LOSS ACCOUNT**

	£	£
<b>INCOME</b>		
Parents Reception Evening	1,445.00	
Donation - Tesco Groundworks - Horticultural Garden	1,000.00	
Cycling Challenge	40.00	
Old Applefordian Day	1,160.26	
School Bus	4,200.00	
Christmas Fair	825.65	
Cake Sales	187.00	
Easy Fundraising	470.25	
Gift Aid	1,875.00	
Second Hand Uniform	422.95	
Apple Orchard Fund	1,269.00	
Grant - Hacker Young - Hanley Building	20,000.00	
Donation - Dr Gardner	3,500.00	
<b>TOTAL INCOME</b>	<b>36,395.11</b>	
<b>EXPENDITURE</b>		
Contribution towards assesment report	875.00	
Orchard garden & Horticultural Garden	1,300.00	
Contribution towards Summer Ball	990.00	
Listening programme - OT	2,319.00	
Old Applefordian Day	150.00	
Equipment for Forrest School - Prep School	6,375.00	
Donation towards Sport Equipment	167.79	
Share of Hanley Building	20,000.00	
Gazebo - Garfield Weston Grant	256.79	
Contribution towards Activity Week	1,000.00	
Other	215.13	
<b>TOTAL EXPENDITURE</b>	<b>33,648.71</b>	
<b>TOTAL NET INCOME</b>	<b>2,746.40</b>	

**BALANCE SHEET**

	£	£
<b>Debtors - receivables</b>		
	_____	
Total Debtors		<b>0.00</b>
<i>Available to distribute:*</i>		
Cash	821.50	
HSBC - Bank account	32,441.12	
<i>Reserved for agreed projects:**</i>		
HSBC - Apple Orchard Fund	6,530.00	
HSBC - Bank account	21,603.45	
	_____	<b>61,396.07</b>
<b>Creditors -payables</b>		
	_____	
Total Creditors		<b>0.00</b>
<b>NET ASSETS</b>		<b>61,396.07</b>
Balance sheet brought forward	58,649.67	
Net income above	2,746.40	
Net assets reconciliation	61,396.07	£0.00
<i>* Total available funds</i>	33,262.62	
<i>** Total reserved funds for agreed projects</i>	28,133.45	

These accounts were approved by the Friends of Appleford on the 6th of September 2022

Mrs C Newman

Mrs C Shipstone - Secretary



**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

Charity Name  
The Friends of Appleford

**On accounts for the year  
ended**

August 31, 2022

**Charity no  
(if any)**

1010066

**Set out on pages**

2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

**Responsibilities and  
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed 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 (other than that disclosed below \*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

\* Please delete the words in the brackets if they do not apply.

**Signed:**

**Date:**

21 June 2023

**Name:**

Katrina Sarti

**Relevant professional  
qualification(s) or body  
(if any):**

n/a

**Address:**

11 Westbourne Avenue

Emsworth

PO10 7QT

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**

1. Please note I am not a qualified accountant but have experience of signing off accounts through my role in senior NHS post.
2. All the accounts were clear and easy to cross reference with detailed items
3. I confirm that there does not appear to be any material matters to report or disclose

**THE FRIENDS OF APPLEFORD**

England & Wales - Charity number 1010066

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# Accounts

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**FRIENDS OF APPLEFORD**

STATEMENT OF ACCOUNTS: 1 SEPTEMBER 2019 - 31 AUGUST 2020

**PROFIT & LOSS ACCOUNT**

£                      £

**INCOME**

Parents Reception Evening	1,703.50
Appleford Apple Juice	502.07
Cakesales	308.23
Donations (PG - Bursary)	2,500.00
School Bus	4,200.00
Christmas Fair	1,639.75
Carol Service	324.00
Easy Fundraising	261.63
Gift Aid	3,077.92
Second Hand Uniform	212.50
Apple Orchard Fund	834.00
Donation - Fundraising	13,730.00
<b>TOTAL INCOME</b>	<b>29,293.60</b>

**EXPENDITURE**

Appleford Apple Juice	235.50
Orchard garden	2,856.77
Contribution towards India trip	1,500.00
Media Pads to Lower School	2,099.90
Forest School - Lower School	1,500.00
Defibrillator	250.00
Activity Classes	1,000.56
<b>TOTAL EXPENDITURE</b>	<b>9,442.73</b>

**TOTAL NET INCOME****19,850.87****BALANCE SHEET**

£                      £

## Debtors - receivables

## Total Debtors

0.00

*Available to distribute:\**

Cash	2,490.21
HSBC - FOA Treasury	16,690.62

*Reserved for agreed projects:\*\**

HSBC - Apple Orchard Fund	3,170.00
School Account - Apple Orchard Fund	260.00
HSBC - Fundraising	33,428.23
HSBC - Garfield Weston Grant	9,000.00

**65,039.06**

## Creditors - payables

Appleford School - Forest School

## Total Creditors

**NET ASSETS****65,039.06**

Balance sheet brought forward

**45,188.19**

Net income above

19,850.87

Net assets reconciliation

**65,039.06***\* Total available funds*

19,180.83

*\*\* Total reserved funds for agreed projects*

45,858.23

These accounts were approved by the Friends of Appleford on the November 12, 2020

Mrs C Newman

*Carole Newman*

Mrs C Shipstone - Secretary

*C Shipstone*



**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

Charity Name  
The Friends of Appleford

**On accounts for the year  
ended**

August 31, 2020

**Charity no  
(if any)**

1010066

**Set out on pages**

2

*(remember to include the page numbers of additional sheets)*

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/08/2020**.

**Responsibilities and  
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed 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 (other than that disclosed below \*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

*\* Please delete the words in the brackets if they do not apply.*

**Signed:**

*G.P.C. Stallard*

**Date:**

30 JANUARY 2021

**Name:**

GRAHAM P STALLARD

**Relevant professional  
qualification(s) or body  
(if any):**

NONE

**Address:**

Rose Cottage, 86 Little Ann Road, Abbots Ann

ANDOVER SP11 7NW

Hampshire

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**

1. Please note that I am not a qualified accountant. I am a trained bookkeeper with many years experience of completing accounts to Income Statement and Balance Sheet. I also have had good experience of public accounts at District Council level as a Cabinet Member for Test Valley Borough Council (TVBC). As a Trustee of a completely different charity I am also very familiar with the Commission's requirements as I maintain that charity's details on the Commission's web site.
2. I would like to acknowledge the quality of the payment and receipt accounting at the Friends of Appleford and congratulate the Treasurer on that. All was clear, detailed and accurate. The cross referencing of each item was particularly useful to me, and provided a high level of confidence in the outcome.
3. I would recommend that a stronger system of financial governance be introduced by vote at the next AGM / EGM. Currently the Treasurer is empowered by HSBC correspondence to spend up to £5,000.00 on his/her authority alone. This works well in the accounts that I have seen. However, for stronger risk management going forward, I recommend that this is reduced to say £500.00 or £1,000.00 and that amounts up to £5,000.00 can be paid by the Treasurer only after a minuted committee resolution specific to the payee.
4. I fully understand that petty cash of nearly £2,500.00 has been held at times during this year as a result of the pandemic, and that this has recently been substantially reduced. I do, however, recommend that going forward much smaller amounts of petty cash are held.
5. I confirm that there are no further material matters to report or disclose.



## Trustees' Annual Report for the period

**From 31 August 2019**  
**Period end date**

**Period start date To 31 August 2020**

**Charity name: The Friends of Appleford**

**Charity registration number:1010066**

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To raise funds for Appleford School in order to provide facilities and support to pupils, teachers and parents. To promote Dyslexia and Special Educational Needs.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	To organise events like Christmas Fayre, Applefordian day, Receptions and Fundraising events. Look at appropriate grants to support the school.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have had regard to the guidance issued by the charity commission.

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	

Other		

## Achievements and Performance

	SORP reference	
<p>Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.</p>		<p>The charity has supported the development of a Forest School facility that has enabled an enhanced level of outdoor learning to take place and the development of practical skills by the children. Additionally, a new garden which will, as it matures, provide an attractive focal point for the school and an asset for our Occupational Therapists. A large gazebo which will provide an undercover, outdoor classroom to support the both the Forest School and lessons across the School. Planned social events (currently cancelled due to Covid).</p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Friends of Appleford had an income of £29,293.60 and expenditure of £9,442.73, resulting in a net income of £19,850.87.  As of August 31,2020, the net assets amounted to £65,039.06.  Please see our accounts for further details.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves are held for the following reasons: <ol style="list-style-type: none"> <li>1) Support a family with one term's school fee, if financial situation has changed temporarily.</li> <li>2) Support a family financially, if they struggle to pay for a specialist report.</li> <li>3) Annual reoccurring events</li> <li>4) Agreed projects by the committee, which have not been completed within the financial year.</li> </ol>
Amount of reserves held	Para 1.22	Amount reserved as of August 31, 2020 is £45,858.23
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	None

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Association
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are elected by the committee members.

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

### Reference and Administrative details

Charity name	The Friends of Appleford
Other name the charity uses	
Registered charity number	1010066
Charity's principal address	Appleford School Elston Shrewton Salisbury Wiltshire SP3 4HL

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1				
2	Carolyn Rosemarie Shipstone	Trustee / Secretary		Friends of Appleford Committee
3	Anna Cathrine Dahlqvist Broome	Trustee – Treasurer		Friends of Appleford Committee
4	Camilla Newman	Trustee - Chairman		Friends of Appleford Committee
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**Corporate trustees – names of the directors at the date the report was approved**

<b>Director name</b>		

**Name of trustees holding title to property belonging to the charity**

<b>Trustee name</b>	<b>Dates acted if not for whole year</b>	

**Funds held as custodian trustees on behalf of others**

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

**Additional information (optional)**

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address
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**Name of chief executive or names of senior staff members (Optional information)**

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**Exemptions from disclosure**

Reason for non-disclosure of key personnel details

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**Other optional information**

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	Camilla Newman	
Full name(s)	CAMILIA NEUMAN ,	
Position (eg Secretary, Chair, etc)	chairman	
Date	19/01/2021	