



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 6 April 2024 To 5 April 2025

Charity name: The Hermitage Trust

Charity registration number: 1127129

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Charity was set up to provide financial support to other charities.
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	The Charity operates by making grants to other charities for general charitable purposes, and the advancement of health or saving of lives.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In setting the objectives and planning the activity of the charity, the Trustees have given careful consideration to the Charity Commission's general guidance on public benefit.

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	<p>Interburns</p> <p>The Hermitage Trust has helped fund Community Burn Prevention training for 30 community workers in Patan, Lalitpur. The newly accredited Basic Burn Care was run for 38 community health workers in Madesh Province in partnership with the Provincial Health Training Centre and Interplast Nepal. In 2025 Advanced Burn Care (Rehabilitation) was held in Freetown, Sierra Leone for 24 therapists from Sierra Leone, Nigeria, Senegal, Liberia, Ghana and Syria. Above: faculty from Ghana, Tanzania, Nepal, Malawi, Sierra Leone and the UK.</p>

		<p>Local multi-disciplinary faculty were trained as trainers in Essential Burn Care and the course was co-delivered to doctors and nurses from provincial level hospitals. Community Burn Prevention was also delivered to 20 local health workers in Moyamba District.</p> <p>Moorfields The Hermitage Trust is helping to contribute funding the new & research into potential treatments for macular degeneration using a range of advanced technologies.</p> <p>This research has the potential to restore sight to patients with conditions like advanced wet AMD and Stargardt's Disease. We're proud to be a part of one of the biggest efforts in this area: the London Project to Cure Blindness.</p> <p>There are also a number of other funded projects into macular degeneration.</p> <p>AMREF Amref Health Africa works to drive change in Tanzania by strengthening the health workforce, improving access to essential services, and tackling the factors that influence people's health, referred to as the social determinants of health. Work includes programmes across the following areas;</p> <ul style="list-style-type: none"> • Women & Girls • Water and disease prevention • Health worker training • Social determinants of health • Climate & health <p>DesCare Funds were used to directly support Peter King in his personal development though out the year. Funds have been used to support his independence and to keep him connected to family members in Greece. DesCare is also supporting a range of clients in extra-curricular activity to support their development and preparation for adulthood.</p> <p>Newfriars College The Hermitage Trust funding was used to offset the cost of a residential to Menorca for 20 students. Students also attended a 4 day PGL residential in the Lakes. These</p>
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		<p>trips are crucial for the learner's personal development and also give their parents some respite during the year.</p> <p>Cancer Research UK The Hermitage Trust match funded Stephen Lewis Brammer as he cycled around the world on an exercise bike in his lounge. The quest took 4yrs and 4months and a distance of 40,075km and total raised was in excess of £26,000.</p> <p>London School of Hygiene & Tropical Medicine. Baby Ubuntu provides supportive care and peer-support, and the programme includes training, supervision and mentoring of facilitators. It also provides recommendation on how to monitor and evaluate the programme. This programme offers support to infants from 0-2 years, and as such should, only be undertaken by a trained facilitator, due to the risk to very young children. Baby Ubuntu programme is delivered in Bangladesh, Brazil, Columbia, Ghana, Uganda & Rwanda.</p>
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Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Cash reserves and investments held as at 5 April 2025 amounted to £1,125,003 at cost value (£1,283,027 at market value).
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The Charity has no reserves policy on the basis that it uses funds generated from investment assets to make grants to the other charities and there are minimal overheads to cover. Trustees make grants taking into account the level of available funds.
Amount of reserves held	Para 1.22	As above
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	N/A

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document	Para 1.25	Trust Deed Made on 28 October 2008

(trust deed, royal charter)		
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Trust
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	Elected by existing trustees

Reference and Administrative details

Charity name	The Hermitage Trust
Other name the charity uses	
Registered charity number	1127129
Charity's principal address	16 Chatterley Close Bradwell Newcastle under Lyme Staffordshire ST5 8LE

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Simon Martin Osborne Bartram			
2	Julian Osborne Bartram			
3	Jason Royston Osborne Bartram		Appointed 1 July 2025	
4				
5				
6				
7				
8				
9				
10				

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

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

Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)	<i>Simon Bartram</i>	
Full name(s)	Simon Martin Bartram	
Position (eg Secretary, Chair, etc)	Trustee	
Date	05 February 2026	



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Hermitage Trust

1127129

Receipts and payments accounts

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For the period
from

06/04/2024

To

05/04/2025

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
UK dividends	27,526	-	-	27,526	32,716
Interest	45,181	-	-	45,181	40,686
Overseas dividends	-	-	-	-	5,016
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	72,707	-	-	72,707	78,418
A2 Asset and investment sales, (see table). Proceeds from sale of investment	288,999	-	-	288,999	144,023
	-	-	-	-	-
Sub total	288,999	-	-	288,999	144,023
Total receipts	361,706	-	-	361,706	222,441
A3 Payments					
Donations	168,500	-	-	168,500	65,000
Administration	1,918	-	-	1,918	2,469
Independent Examination Fee	1,200	-	-	1,200	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	171,618	-	-	171,618	67,469
A4 Asset and investment purchases. (see table)	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	171,618	-	-	171,618	67,469
Net of receipts/(payments)	190,088	-	-	190,088	154,972
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	405,929	-	-	405,929	250,957
Cash funds this year end	596,017	-	-	596,017	405,929

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank accounts	-	-	-
	Managed deposit account	287,823	-	-
	Income deposit account	308,194	-	-
	Total cash funds (agree balances with receipts and payments account(s))	596,017	-	-
		OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Investment portfolio consisting of equities, fixed interest and other investments	Unrestricted	528,986	687,010
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
		Simon Bartram		



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
The Hermitage Trust

On accounts for the year
ended

5 April 2025

Charity no
(if any)

1127129

Set out on pages

7-8

(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 5 April 2024.

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 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.

Signed: *Hazra Patel*

Date:

Name: Hazra Patel

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

ACA

Address:

Lubbock Fine LLP, Chartered Accountants

65 St Paul's Churchyard
London

EC4M 8AB