

SHELLEY EDUCATIONAL FOUNDATION

England & Wales · Charity number 1194218

Details

Status Registered

Legal form CIO

Registered 2021-04-26

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

Contact

Address 40 Hawthorne Way
Shelley
Huddersfield
HD8 8JX

Phone 07788 404707

Email shelleyeducationalfoundation@gmail.com

Activities

Objects: FOR THE PUBLIC BENEFIT, TO PROMOTE THE EDUCATION (INCLUDING SOCIAL AND PHYSICAL TRAINING) OF PEOPLE UNDER THE AGE OF 25 YEARS WHO ARE RESIDENT OR WHO HAVE A PARENT RESIDENT IN THE SHELLEY WARD OF THE PARISH OF KIRKBURTON IN WEST YORKSHIRE IN SUCH WAYS AS THE CHARITY TRUSTEES THINK FIT, INCLUDING BY:1) AWARDING TO SUCH PERSONS WHO ARE IN NEED OF FINANCIAL ASSISTANCE SCHOLARSHIPS, EXHIBITIONS, BURSARIES, MAINTENANCE ALLOWANCES OR GRANTS TENABLE AT ANY SCHOOL, UNIVERSITY, COLLEGE, COLLEGE OF EDUCATION OR INSTITUTION OF HIGHER OR FURTHER (INCLUDING PROFESSIONAL AND TECHNICAL) EDUCATION APPROVED FOR THE PURPOSE BY THE TRUSTEES;2) PROVIDING FINANCIAL ASSISTANCE, OUTFITS, CLOTHING ,TOOLS, INSTRUMENTS OR BOOKS TO ASSIST SUCH PERSONS WHO ARE IN NEED OF FINANCIAL ASSISTANCE TO PURSUE THEIR EDUCATION (INCLUDING THE STUDY OF MUSIC AND OTHER ARTS), TO UNDERTAKE TRAVEL IN FURTHERANCE OF THAT EDUCATION OR TO PREPARE FOR ENTRY TO ANY OCCUPATION, TRADE, SERVICE OR PROFESSION ON LEAVING ANY EDUCATIONAL ESTABLISHMENT;3) PROVIDING SUCH SPECIAL BENEFITS OF ANY KIND NOT NORMALLY PROVIDED BY THE LOCAL EDUCATION AUTHORITY FOR ANY SCHOOL IN OR SUBSTANTIALLY SERVING THE SAID WARD AS MAY FROM TIME TO TIME BE AGREED BETWEEN THE TRUSTEES AND THE GOVERNORS OF THE SCHOOL CONCERNED AFTER CONSULTATION WITH THE SAID AUTHORITY; OR4) IN OR TOWARDS PROVIDING FACILITIES NOT NORMALLY PROVIDED BY THE SAID AUTHORITY FOR RECREATION AND SOCIAL AND PHYSICAL TRAINING FOR SUCH PERSONS.

Activities: To distribute small grants to young people living in Shelley going on to Higher Education or Apprenticeships

Classification

- **How:** Makes Grants To Individuals
- **What:** Education/training
- **Who:** Children/young People

Geography

- Kirklees

Finances

Period end	Income	Expenditure	Assets	Employees
2025-09-30	£1,711	£1,352	-	-
2024-09-30	£3,099	£3,131	-	-
2023-09-30	£946	£2,817	-	-
2022-09-30	£3,767	£1,970	-	-

Trustees

Name	Role	Appointed
Carol Rowatt	Chair	2022-10-11
Ann Priestman		1996-07-17
Dr William George Armer		2015-09-29
Maureen Nancy Sykes		2026-06-09
Rev Lindsey Barber		2024-10-14

Accounts

SEF Trustees Annual Report for the year ending 30th Sept 2025

Charities Name: Shelley Educational Foundation (SEF)

Registration Number: 1194218

Address: 40 Hawthorne Way, Shelley, HD8 8JX

Trustees: Carol Rowatt (Chair & Treasurer)
Ann Priestman (Secretary)
Rev. Lindsey Barber
Bill Armer
Ray Bray

Structure of the SEF

The SEF normally has 5 trustees: 2 Appointed Trustees, 2 Nominated Trustees and 1 Ex officio trustee.

The chair, treasurer and secretary role are currently held by the 2 appointed trustees.

1) Appointed charity trustees

In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO and shall be persons who through residence, occupation or employment or otherwise have special knowledge of the Shelley Ward of the Parish of Kirkburton. Every appointed trustee must be appointed for a term of five years by a resolution passed at a properly convened meeting of the charity trustees.

No changes were made to the trustees in this financial year

2) Ex officio Trustee

The incumbent or priest in charge for the time being of the present Parish of Shelley shall automatically ("ex-officio") be a charity trustee, for as long as he or she holds that office. This post has now been filled by Reverend Lindsey Barber who was appointed as Ex officio Trustee on 15th October 2024.

3) Nominated Trustees

Kirkburton Parish Council ("the appointing body") may appoint 2 charity trustees. Any appointment must be made at a meeting held according to the ordinary practice of the appointing body. Each appointment must be for a term of four years.

No changes were made to the Nominated Trustees in this financial year.

Activities and Objectives

The objectives of the SEF are to promote the further education of people under the age of 25 years who are resident or who have a parent resident in the Shelley Ward of the Parish of Kirkburton in West Yorkshire currently we do this by offering a small grant to help provide equipment for further education or apprenticeship courses.

Achievements and Performance

Grant Allocation

This year the SEF issued 10 grants to student from Shelley to the total value of £500.

1. Change of Charity Structure

There have been no changes to the structure of the Shelley Educational Foundation Charity in the last financial year

2. Treasurer's Report

In addition to the £500 paid out in grants £780 in grants was awarded to the Shelley Educational Foundation for the maintenance of its land, £129.20 was raised at the local Shelley Open Gardens and £200 was donated towards the cost of repairing a wall on the charities land.

The annual insurance of £146.69 was paid in September.

This year's 2025 Kirkburton Parish Council Small Annual Grant for £300 was submitted in October to help cover the cost of maintaining the land owned by the SEF.

3. Land Management

The land under the village hall (on Far Bank) has been maintained once this year, and we now have a volunteer who regularly works on this piece of land adding features depending on the time of year or the events going on in the village.

The Bridle has been generally maintained by Shelley Conservation and Environment Group, generally cutting back over grown paths and vegetation.

Shelley Educational Foundation

Statement of Accounts for year ending 30 September 2025

	<u>2025</u>	<u>2024</u>		<u>2025</u>	<u>2024</u>
	£	£		£	£
INCOME			EXPENDITURE		
Trust Fund Interest	564.82	577.72	Student Grants	500.00	450.00
Donations	200.00	594.42	Insurance	146.69	146.69
Grants	780.00	1,800.00	Professional Fees	45.00	-
Bank Interest	36.77	22.78	Trustees Expenses	-	32.64
Fundraising	129.20	59.00	HSBC Bank Charges	-	-
Other	-	45.00	Land Maintenance	640.00	2,476.92
			Other	20.30	25.00
	<u>1,710.79</u>	<u>3,098.92</u>		<u>1,351.99</u>	<u>3,131.25</u>
			SURPLUS FOR YEAR	<u>358.80</u>	<u>- 32.33</u>
	<u>£ 1,710.79</u>	<u>£ 3,098.92</u>		<u>£ 1,710.79</u>	<u>£ 3,098.92</u>

ACCUMULATED FUND

	<u>2025</u>	<u>2024</u>
	£	£
Accumulated Surplus Brought Forward	17,285.65	16,755.33
Surplus for the year	358.80	- 32.33
Trust Fund profit/loss for year**	- 384.53	562.65
	<u>£ 17,259.92</u>	<u>£ 17,285.65</u>
Represented by:		
Cash at Bank	3,601.71	3,242.91
Cash in Investment Trust	13,658.21	14,042.74
	<u>£ 17,259.92</u>	<u>£ 17,285.65</u>

** Investment Fund profit or loss due to fluctuation in share prices

Prepared By: Carol Rowatt

Signed Off By:

Ann Priestman

Date Signed Off: 6th December 2025

Accounts

SEF Trustees Annual Report for the year ending 30th Sept 2024

Charities Name: Shelley Educational Foundation (SEF)

Registration Number: 1194218

Address: 40 Hawthorne Way, Shelley, HD8 8JX

Trustees: Carol Rowatt (Chair & Treasurer)
Ann Priestman (Secretary)
Bill Armer
Ray Bray

Structure of the SEF

The SEF normally has 5 trustees: 2 Appointed Trustees, 2 Nominated Trustees and 1 Ex officio trustee.

The chair, treasurer and secretary role are currently held by the 2 appointed trustees.

1) Appointed charity trustees

In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO and shall be persons who through residence, occupation or employment or otherwise have special knowledge of the Shelley Ward of the Parish of Kirkburton. Every appointed trustee must be appointed for a term of five years by a resolution passed at a properly convened meeting of the charity trustees.

No changes were made to the trustees in this financial year

2) Ex officio Trustee

The incumbent or priest in charge for the time being of the present Parish of Shelley shall automatically ("ex-officio") be a charity trustee, for as long as he or she holds that office. Currently there is no incumbent or priest for the Parish of Shelley, therefore there is currently no Ex official trustee.

3) Nominated Trustees

Kirkburton Parish Council ("the appointing body") may appoint 2 charity trustees. Any appointment must be made at a meeting held according to the ordinary practice of the appointing body. Each appointment must be for a term of four years.

No changes were made to the Nominated Trustees in this financial year.

Activities and Objectives

The objectives of the SEF are to promote the further education of people under the age of 25 years who are resident or who have a parent resident in the Shelley Ward of the Parish of Kirkburton in West Yorkshire currently we do this by offering a small grant to help provide equipment for further education or apprenticeship courses.

Achievements and Performance

Grant Allocation

This year the SEF issued 9 grants to student from Shelley to the total value of £450.

1. Change of Charity Structure

There have been no changes to the structure of the Shelley Educational Foundation Charity in the last financial year

2. Treasurer's Report

In addition to the grants paid out this year grants have been awarded to the Shelley Educational Foundation for the maintenance of its land and for the erection of an information board on the Bridle and £59 was raised at the local Shelley Gala

The annual insurance of £146.69 was paid in August

This year's 2024 Kirkburton Parish Council Small Annual Grant for £300 was submitted in October to help cover the cost of maintaining the land owned by the SEF.

3. Land Management

The land under the village hall (on Far Bank) has been maintained once this year, we are finding it increasingly difficult to find companies that are able to do maintenance on this piece of land at a reasonable cost and on a fairly regular basis due to the position and difficult access to this land, it is this that means it is not possible for Shelley Conservation and Environment Group (SCEG) to maintain this land for the Charity.

SCEG have done further maintenance work on the Bridle and an information board about the flora, faunal and wildlife on the bridle has also been erected so that people walking through the Bridle can read about what they should be looking out for.

Shelley Educational Foundation

Statement of Accounts for year ending 30 September 2024

	<u>2024</u>	<u>2023</u>		<u>2024</u>	<u>2023</u>
	£	£		£	£
INCOME			EXPENDITURE		
Trust Fund Interest	577.72	577.72	Student Grants	450.00	580.00
Donations	594.42	68.00	Insurance	146.69	146.69
Grants	1,800.00	300.00	Professional Fees	-	-
Bank Interest	22.78		Trustees Expenses	32.64	-
Fundraising	59.00		HSBC Bank Charges	-	65.60
Other	45.00	-	Land Maintenance	2,476.92	2,025.00
	<u>3,098.92</u>	<u>945.72</u>	Other	25.00	-
				<u>3,131.25</u>	<u>2,817.29</u>
			SURPLUS FOR YEAR	- 32.33	- 1,871.57
	<u>£ 3,098.92</u>	<u>£ 945.72</u>		<u>£ 3,098.92</u>	<u>£ 945.72</u>

ACCUMULATED FUND

	<u>2024</u>	<u>2023</u>
	£	£
Accumulated Surplus Brought Forward	16,755.33	18,827.90
Surplus for the year	- 32.33	- 1,871.57
Trust Fund profit/loss for year**	562.65	- 201.00
	<u>£ 17,285.65</u>	<u>£ 16,755.33</u>
Represented by:		
Cash at Bank	3,242.91	3,275.24
Cash in Investment Trust	14,042.74	13,480.09
	<u>£ 17,285.65</u>	<u>£ 16,755.33</u>

** Investment Fund profit or loss due to fluctuation in share prices

Prepared By: Carol Rowatt

Signed Off By: Ann Priestman

Date Signed Off: 1st Dec 2024

Accounts

SEF Trustees Annual Report for the year ending 20Sept2023

Charities Name: Shelley Educational Foundation (SEF)

Registration Number: 1194218

Address: 40 Hawthorne Way, Shelley, HD8 8JX

Trustees: Carol Rowatt (Chair & Treasurer)
Ann Priestman (Secretary)
Bill Armer
Ray Bray

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The chair, treasurer and secretary role are currently held by the 2 appointed trustees.

1) Appointed charity trustees

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Stephen Hughes resigned as a trustee on 22nd October 2022

Carol Rowatt was accepted as a trustee on 22nd October 2022

2) Ex officio Trustee

The incumbent or priest in charge for the time being of the present Parish of Shelley shall automatically ("ex-officio") be a charity trustee, for as long as he or she holds that office. Currently there is no incumbent or priest for the Parish of Shelley, therefore there is currently no Ex official trustee.

3) Nominated Trustees

Kirkburton Parish Council ("the appointing body") may appoint 2 charity trustees. Any appointment must be made at a meeting held according to the ordinary practice of the appointing body. Each appointment must be for a term of four years.

Tricia Moores was replaced by Ray Bray as a Nominated Trustee on 23rd May 2023

Activities and Objectives

The objectives of the SEF are to promote the further education of people under the age of 25 years who are resident or who have a parent resident in the Shelley Ward of the Parish of Kirkburton in West Yorkshire currently we do this by offering a small grant to help provide equipment for further education or apprenticeship courses.

Achievements and Performance

Grant Allocation

This year the SEF issued 12 grants to student from Shelley to the total value of £580.

1. Change of Charity Structure

Ann Priestman completed and submitted all forms provided by the Land Registry with Rev Joyce Jones and Stephen Hughes, the £45 fee was repaid to the Land Registry and we are now waiting for the Land Registry to get back to us on completion of the application.

2. Treasurer's Report

A community current account and savings account has been setup with the Co-operative bank and all money has been transferred from HSBC to the new account. It should be noted that this was done to save money and also to allow the Foundation to earn some interest from the money held in its Bank Accounts. HSBC were charging the Foundation a fee of £5 per month plus an additional fee for any cheques written against the account. By moving to the Co-operative Bank, the Foundation is saving a minimum £60.

£68 was raised from the Wellie Wanging at the Shelley Gala and the sale of some Scarves.

The annual insurance of £146.69 was paid in August

This year's 2023 Kirkburton Parish Council Small Annual Grant for £300 was submitted on 7th October 2023 to cover the cost of maintaining the land owned by the SEF.

3. Land Management

After a lot of prompting by Ann the land under the village hall was re-sprayed by Sharps, this was covered by the initial invoice. As Sharps have not been overly helpful Ann has been in contact with another land maintenance firm to see if they could respray the land below the village hall as this will need to be done on a regular basis.

The possibility of getting some planters or something as a focal point on this land was discussed to allow plants to be grow in them without being affected by any spraying of the ivy that would need to continue to take place.

Large shrub that brought down the wall at the bottom of the Bridle has been made safe SCEG removed any loose stones and placed them on the Bridle behind the wall. SCEG have agreed to check the wall whenever they are working on the Bridle. David asked Andy Wickham about using this for a Dry-Stone walling course for some of the SCEG but is not going to pursue it at this point in time.

In addition to securing the wall the SCEG have cleared around the benches on the Bridle, moved some Oak trees to lower down the hill on the Bridle and have done general maintenance to keep the paths through the bridle clear.

Shelley Education Foundation
Statement of Accounts for year ending 30 September 2023

	<u>2023</u>	<u>2022</u>		<u>2023</u>	<u>2022</u>
	£	£		£	£
INCOME			EXPENDITURE		
Trust Fund Interest	577.72	577.72	Student Grants	580.00	400.00
Donations	68.00	829.37	Insurance	146.69	146.70
Grants	300.00	2,360.00	Professional Fees	-	1,375.00
Other	-	-	HSBC Bank Charges	65.60	48.20
			Land Maintenance	2,025.00	-
			Other	-	-
	<u>945.72</u>	<u>3,767.09</u>		<u>2,817.29</u>	<u>1,969.90</u>
			SURPLUS FOR YEAR	- 1,871.57	1,797.19
£ <u><u>945.72</u></u>	£ <u><u>3,767.09</u></u>		£ <u><u>945.72</u></u>	£ <u><u>3,767.09</u></u>	

ACCUMULATED FUND

	<u>2023</u>	<u>2022</u>
	£	£
Accumulated Surplus Brought Forward	18,827.90	21,076.39
Surplus for the year	- 1,871.57	1,797.19
Trust Fund profit/loss for year**	- 201.00	- 4,045.68
£ <u><u>16,755.33</u></u>	£ <u><u>18,827.90</u></u>	
Represented by:		
Cash at Bank	3,275.24	5,146.81
Cash in Investment Trust	13,480.09	13,681.09
£ <u><u>16,755.33</u></u>	£ <u><u>18,827.90</u></u>	

**** Investment Fund profit or loss due to fluctuation in share prices**

Prepared By: Carol Rowatt

Signed Off By: Ann Priestman

Date Signed Off: 31-Jan-24

Accounts

SEF Minutes Tuesday 11th October 2022

Attending: Trustees Stephen Hughes (Chair) Ann Priestman (Sec) Tricia Moores

Apologies: Trustee Bill Armer, Advisor Ray Bray

Also Attending Prospective Trustee and Treasurer Carol Rowatt

Malcolm MacDonald tendered his resignation as advisor of SEF having been a Trustee and Advisor for 23 years. The trustees expressed their gratitude to Malcolm for his active service to the charity particularly lately on environmental issues.

Change of Charity Structure:

The Land Registry is still transferring land to new charity – Ann to remind our solicitor we are waiting.

Stephen to contact HSBC, BlackRock and EIS Liability Insurance to notify them of change of charity number and new Treasurer and to add Carol as new signatory. Stephen to continue as signatory until all cheques cleared and Accounts changed.

Carol will then investigate internet banking.

Carol happy to be Charity Commission contact when charity moves across.

Old charity will need to be closed down.

Treasurer's Report:

Stephen circulated prepared accounts. We look to have plenty of money with a balance of £5,146.81 but it includes Malcolm's French Sunday Lunch money and Gerald's £1,000 donation and KPC grant – all ring-fenced.

8 cheques were paid to students

2 cheques paid to solicitor and 1 cheque paid for Insurance

It was noted that investments valued at £18,448.93 last year are worth just £15,457.40 this year.

Stephen to move Malcolm's French Sunday Lunch money to BlackRock.

Land Management:

- KPC has released grant of £2,360 for clearance of land under Village Hall with hope that a 'garden space' can be created afterwards and Sharp's Tree Services have been engaged They will flail land and then spray the ivy right up to Mr Bowers wall and to return for a small fee on a regular basis to re-spray. Their invoice is - £1,700 plus VAT.
- It was decided by all trustees to proceed with Sharp's who came recommended by Village Hall committee and because the TCV quote had risen so steeply and didn't include any spraying.
- Ann has applied to KPC Small Grants round for a grant for re-spray next year.
- Tricia to keep Mr Bowers in the loop re dates and spraying although Simon from Sharps stays with the land while the spray dries and becomes inactive. Mr Bowers feels aggrieved over perceived non-management of land and did threaten legal action over damaged walls from the ivy and a cherry tree. The VH committee also insisted all buddleias be taken down as they claim they are damaging the party wall. Ann obtained free advice from local Structural Engineer Tom Henry who says walls aren't always built thick enough and disputes damage caused by any of these trees – damage is more likely if trees are removed too drastically as ground moisture stabilizes. He did say all oak saplings must be removed before they cause trouble.

- SCEG have kindly cleared a passage to the metal fence at top of land from VH garden although Sharps may not need access this way, but have been asked to remove cuttings. Many thanks to SECEG for clearing this access and the Village Hall committee who will allow us to access our land this way on an occasional basis.
- SCEG may take on some maintenance of this land if safe to do so.
- Sarah Simpson from SEF has removed all overhanging ivy onto Far Bank – our thanks to be passed to her.
- The Bridle is being managed on a regular basis by SCEG – brambles and paths cleared, wildflower meadow sown, bird and bat boxes erected and with a KPC grant SCEG have installed new benches and a plaque for Queen's Platinum Jubilee. SCEG to be thanked by trustees for all their hard work and for applying for grants that have enhanced the Bridle as a public amenity. We are fortunate to have such an active group working on our land.
- Solar panels was suggested for land under Village Hall but having seen a representative from Warmaway the conclusion is it may be impractical unless the Village Hall committee want to make use of energy from solar panels as there is no power source on land.

Student Applications: 14 Applications received. Two were deemed not to qualify as they were studying for A Levels and a BTec, One received the lower rate of £30 as he had lived in Shelley for just a year but the other 11 received a full grant of £50 each.

Discussion amongst Trustees about qualifying for grant and it was agreed not A Levels or BTecs but qualifications after these – Higher Education or Level 3 Apprenticeships or above.

Some of Malcolm's French Sunday Lunch money used for these grants.

AOB; Carol offered to raise funds for SEF at next year's Gala if they attend.

Stephen formally retired from SEF and was thanked for all his diligent work as Chair and Treasurer of SEF for 25 years, especially through turbulent financial times recently and for managing so many disputes and problems arising from the land – far more than when he started.

A small presentation was made on behalf of the Trustees.

Carol Rowatt was welcomed as Trustee and Treasurer of SEF by the trustees.

Date of next meeting; Tues 13th June at 2pm at Ann's house.

Statement of Accounts For Year ending 30 September 2022

** for clearance work to be done to SEF land to the side of Shelley Village Hall