

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