



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From: April 1<sup>st</sup> 2024 Period start date To March 31<sup>st</sup> 2025 Period end date

Charity name: Dalton St Mary's Parent Voice

Charity registration number: 1196862

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The object of the association (The objects) is to advance the education of pupils in the school in particular by: 2.1 Developing effective relationships between staff, parents and others associated with the school 2.2 Engaging in activities or providing facilities or equipment which support the school and advance the education of the pupils
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 trustees of the charity work with the parent volunteers to organise events to raise money to enhance the learning opportunities at the school. This year the fund raising events have included Fayres at Christmas, Easter and in the Summer, a disco for Autumn and a movie night in the Spring. Members of the charity chose to carry out a local walk on behalf of the charity. A local company, Orcina, also donates a substantial amount from the charity account into the school budget. Monies are spent on funding specific resources for projects e.g. Our Outdoor Play And Learning project buying consumables for the outdoors, storage, boom box etc. to enhance playtimes. Bibles are donated by the charity for the Year 6 leavers in order to support the children as they leave 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 of Dalton St Mary's Parent Voice Charity are aware of the guidance issued by the Charity Commission on public benefit. They have taken this into account when making decisions to which the guidance is relevant. They have not departed from the guidance for any reason.

### 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	
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>The children of the school have benefit greatly from the charity. All children are enjoying the developing Outdoor Play and Learning happening at the school. The children now have a plethora of activities open to them to choose what they wish to do during their play times. There is less falling out and the children are much happier in their play.</p> <p>The charity also ensures that the children are able to attend trips and residentials organised at a reduced cost to parents and where parents are unable to fund their children in these activities, it enables the child to attend alleviating their financial pressures in such cases.</p> <p>The charity has organised additional curriculum enhancing activities i.e. enabling classes to partake in Indian dance workshops and have smart football kit to attend the county finals football competition.</p> <p>The charity donate presents for the children from Father Christmas (selection boxes) and bibles for the children leaving the school at the end of the year.</p> <p>Money from the charity has helped to fund a reading project for Key Stage 1 providing 1:1</p>

		<p>and small group tuition in the FFT reading programme.</p> <p>Money has also gone into providing a Family Worker for the school who supports children and families struggling to cope with daily life: they may be struggling with a child's behaviour, have been bereaved or may be dealing with problems related to social deprivation, mental health difficulties or split family issues.</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	
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The charity does not have a reserves policy.
Amount of reserves held	Para 1.22	
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	Parent Kind Model constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Unincorporated 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	New trustees are elected by group of trustees.

### 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	Dalton St Mary's Parent Voice Charity
Other name the charity uses	
Registered charity number	1196862
Charity's principal address	Dalton St Mary's C of E School Dalton-in-Furness Cumbria LA15 8JB

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Stephanie Pearson	Chair	Sept 23 - present	The trustee group as a whole agree on new members.
2	Lesley Millington	Treasurer	Sept 22 – present	
3	Nicola O'Reilly	Trustee	Sept 22 - present	
4	Laura Clinton	Trustee	Sept 22 - present	
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

## 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)		

### Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

### Other optional information

--

## Declarations

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

Signed on behalf of the charity's trustees

	Signature(s)	<i>Step</i>	
	Full name(s)	Stephanie Pearson	
	Position (eg Secretary, Chair, etc)	Chair of Trustees	
	Date	07/01/26	

# Friends of Dalton St Mary's CofE School

## Balance Sheet September 2024 to August 2025

### INCOME

Balance Nat West @  
31st Aug 2024 £5,621.06

Autumn Disco £382.67

Keswick to Barrow Wall £550.00

Christmas Fayre £2,286.22

Orcina Donation £198,623.00

Asda Cash Pot £562.58

Easter Fayre £423.06

Breast Cancer Now Xmas £164.15

Summer Fayre £756.66

### EXPENDITURE

Max Mill Painting of bench £62.00

B&M Paint for bench £28.00

Amazon Foldable book trolley. Footballs OPAL £36.97

parentkind £163.00

DSM Bibles £178.50

DSM Indian Dance Workshop £599.00

Amazon OPAL Storage Box £149.99

DSM Ragtag Arts OPAL Loose Parts £1,131.50

Amazon Footballs. Chalk pens OPAL £43.98

Amazon OPAL Party Speaker (Replaces broken) £291.30

Cheryl Davey Selection boxes £248.71

Laura Wilson Wrapping Paper £16.99

DSM Choir Parentkind £1,172.00

Westmorland & Furness Council (Orcina) Main £192,000.00

DSM School fund (Orcina) £6,623.00

Cumbria Embroidery Girls Football Shirts £153.00

L. Millington Early Years Ennerdale Planters £395.00

Clare Roberts Sports Day Refreshments £70.00

Breast Cancer Now Xmas Trees (stb presented) £164.15

Total Income £203,748.34

Total Expenditure £203,362.94

Balance + Income £209,369.40

Income — Expenditure £6,006.46

Balance Nat West @  
31st August 2025 £6,006.46

Accounts prepared by Lesley Millington

I have checked these accounts according  
to the bank balances and receipts provided

Signed

*L Millington*

Signed

*J Pearson*

Date

7/1/26

Date

7/1/26



Section A

Independent Examiner's Report

Report to the trustees

Dalton St Mary's Parent Voice

On accounts for the year  
ended

September 2024 / August 2025

Charity no  
(if any)

1196862

Set out on pages

(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 .

Responsibilities and  
basis of report

As the charity's trustees, 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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [ ] if not applicable.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (~~other than that disclosed below~~\*) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did 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.

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

Signed:

Date:

22/10/2025

Name:

LYNDA PRESTON

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

DIRECTOR - DUNNTHORPE GC.

Address:

25 CROMPTON DRIVE
DALTON IN FURNESS
CUMBRIA LA15 8ND

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight material 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.

--