

ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

England & Wales · Charity number 1198567

Details

Status Registered

Legal form Trust

Registered 2022-04-08

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

Contact

Address Orchard House School
16 Newton Grove
London
W4 1LB

Phone 02087428544

Email info@orchardhs.org.uk

Activities

Objects: THE OBJECTS OF THE CHARITY (?THE OBJECTS?) ARE:(A) TO ADVANCE THE EDUCATION OF PUPILS AT ORCHARD HOUSE SCHOOL OF 16 NEWTON GROVE, LONDON W4 1LB IN SUCH MANNER AND IN ALL RESPECTS AS THE TRUSTEES SHALL THINK FIT, IN PARTICULAR (BUT WITHOUT PREJUDICE TO THE GENERALITY OF THE FOREGOING):(I) THROUGH THE AWARD OF BURSARIES, SCHOLARSHIPS, EXHIBITIONS, PRIZES AND GRANTS TO SUCH PUPILS AND PROSPECTIVE PUPILS; AND(II) BY MAKING SUCH PAYMENTS AS THEY SHALL IN THEIR ABSOLUTE DISCRETION DETERMINE FOR THE DEVELOPMENT AND IMPROVEMENT OF THE SAID SCHOOL, ITS GROUNDS AND BUILDINGS (INCLUDING THE PROVISION OR RECREATIONAL AREAS AND FACILITIES), FOR THE PURCHASE OF BOOKS (OR ANY OTHER EDUCATIONAL PUBLICATIONS) AND EQUIPMENT (INCLUDING MUSICAL INSTRUMENTS) FOR THE SAID SCHOOL, AND BY FUNDING SPECIALIST TEACHING POSTS AT THE SAID SCHOOL, IN EVERY CASE INSOFAR AS THE SAME SHALL BE CHARITABLE; AND(B) TO PROVIDE FINANCIAL AND ANY OTHER TYPE OF SUPPORT FOR SUCH CHARITY OR CHARITIES OR FOR SUCH CHARITABLE PURPOSE OR CHARITABLE PURPOSES AS THE TRUSTEES SHALL FROM TIME TO TIME IN THEIR ABSOLUTE DISCRETION DETERMINE.

Activities: The objects of the charity are to advance the education of pupils at Orchard House School of 16 Newton Grove, London W4 1LB in such manner and in all respects as the Trustees shall think fit, in particular through the award of bursaries, scholarships, exhibitions, prizes and grants to such pupils and prospective pupils.

Classification

- **How:** Makes Grants To Individuals
- **What:** General Charitable Purposes, Education/training
- **Who:** Children/young People, Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Ealing

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£29,034	£43,421	-	-
2024-12-31	£59,093	£24,770	-	-
2023-12-31	£132,733	£13,343	-	-
2022-12-31	£52,810	£8,366	-	-

Trustees

Name	Role	Appointed
CHIP HUGH JOSEPH HORNE	Chair	2021-02-09
Ioannis Lionis		2025-06-09
Joana Castro da Fonseca Orvalho		2025-06-09
Kerrigan Francis Farah		2025-06-09
Kimberly Dawn Groat		2023-02-01
Lina Tebbs		2024-03-18
Mina Nevin Sokmen-Kossoras		2024-03-18
Sarah Gizella Roberts		2024-03-18

ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

England & Wales - Charity number 1198567

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 January 2025 (Period start date) To 31 December 2025
(Period end date)

Charity name: ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

Charity registration number: 1198567

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(a) To advance the charitable education of pupils at Orchard House School of 16 Newton Grove London W4 1LB in such manner as the trustees shall think fit so long as the same shall be charitable and in particular through the award of bursaries, scholarships, exhibitions, prizes and grants to such pupils, and by making such payments as they shall in their absolute discretion determine for the development of the said school, its grounds and buildings (including the provision of recreational areas and facilities), for the purchase of books (or any other educational publications) and equipment (including musical instruments) for the said school, and by funding specialist teaching posts at the said school. (b) To support such charity or charities or for such charitable purposes as the trustees shall from time to time in their absolute discretion determine.
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 has raised funds through donations, mainly from parents at Orchard House School and the owner of the school, Dukes Education, and used those donations to fund means-tested bursaries for children at Orchard House School.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities, the trustees have given careful consideration to the Charity Commission's guidance on public benefit, and in particular to its supplementary public benefit guidance on advancing education.

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	The charity continued to fund the fees of pupils at Orchard House School, giving the pupils access to educational facilities which those pupils would not otherwise have been able to access, and providing a variety of opportunities for those pupils' development. One bursary student completed their time at Orchard House School, going on to secure a full bursary at their future secondary school. Recruitment for a new bursary student took place during the year, with an offer made to one students who commenced at the school in Year 3, in September 2025. Five of the charity's trustees remained in place throughout the year, providing it with continuity of leadership and skills. In addition, three new trustees were appointed in July to replace current treasurer, and bringing additional compliance and secretariat skills. The charity has continued to forge relationships with the leadership team at Orchard House School, the Orchard House School Parents Association and the ownership group of Orchard House School, Dukes Education.

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	There were net incoming resources of (£14,387.68) during the period, resulting in a healthy end-of-year net asset figure of £183,370.50.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trustees review the finances of the Trust at each meeting and have regard to the available cash reserves and likely future income in deciding the ability to grant bursaries. The guiding principle is to hold a minimum of two terms' fees per bursary student on reserve. At present, our excess over this amount is not a concern.
Amount of reserves held	Para 1.22	£183,370.50
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	School based fundraising and parental donations are the principal source of funds.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	(a) Identifying suitable candidates for bursaries. (b) Fundraising to ensure sufficient resources to support bursaries granted.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust Deed
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	Trustees are interviewed upon application. Candidates' skills sets and biographies are circulated to all trustees, and the board then votes on appointments.

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	All trustees receive copies of relevant Trust documents and financial statements. New trustees have access to existing trustees in the event of any queries.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The trustees split the roles of fundraising, marketing and bursary student liaison between them. The Chair typically liaises with the school heads and owners and there is a Treasurer to deal with finances.
Relationship with any related parties	Para 1.51	The owner, Dukes Education, discounts the school fees of the scholar by 50% per financial year.
Other		

Reference and Administrative details

Charity name	Orchard House School Educational Trust
Other name the charity uses	
Registered charity number	1198567
Charity's principal address	16 Newton Grove London W4 1LB

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	Kimberly Groat	Trustee		
2	Alicia Heeneman-Wong	Trustee	01.01.25 – 06.07.25	
3	Chip Horne	Chair		
4	Sarah Roberts	Trustee		
5	Mina Sokmen-Kossoras	Trustee		
6	Lina Tebbs	Trustee		
7	Tracy Yam	Hon Treasurer	01.01.25 – 06.07.25	
8	Joana Castro da Fonseca Orvalho	Treasurer	06.07.25 - 31.12.25	
9	Kerri Farah	Trustee	06.07.25 - 31.12.25	
10	Yannis Lionis	Trustee	06.07.25- 31.12.25	
11				
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17				
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19				
20				

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

Director name		
None		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
None		

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

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

--

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)

--	--

Full name(s)

--	--

Position (eg Secretary,
Chair, etc)

--	--

Date

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Orchard House School Educational Trust
Registered Charity Number 1198567
Accounting Statement
Receipts and Payments Basis for period 1 January 2025 - 31 December 2025

	2025 £	£
Incoming Resources		
Donations	12,763	
Fundraising Income	16,271	
Total Incoming Resources		29,034
Resources Expended		
Charitable Activities	(42,418)	
Cost of Generating Funds		
Costs of Fundraising (including advertising for bursary students)	(1,004)	
Administrative Costs/Other Costs	0	
Total Resources Expended		(43,421)
Net Incoming/(Outgoing) Resources		(14,388)
Cash Funds at 1 January 2025		197,758
Cash Funds at 31 December 2025		183,371
Statement of Assets and Liabilities for 2025		
Cash Funds		
Metro Bank	183,371	183,371
Other Monetary Assets		
Amount due from Fundraising Activities in 2026	0	
Secured Donations in 2026	11,887	11,887
Liabilities		
Commitments made for Charitable Activities in 2026	(29,182)	(29,182)
Net Assets		166,075

All the trust's funds are unrestricted funds.

We approve the accounts and acknowledge our responsibility for them, and for providing all information and explanations necessary for their compilation.

Signed on behalf of the Trustees

Joana Orvalho
Treasurer

Independent examiner's report to the trustees of Orchard House School Educational Trust

I report to the trustees on my examination of the accounts of the Orchard House School Educational Trust (the Trust) for the year ended 31 December 2025.

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 all 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.

Signed: Johnny Kritzinger
Johnny Kritzinger (Jun 30, 2026 23:34:30 GMT+1)

Name: Johan Cornelius Kritzinger

Relevant professional qualification or membership of professional bodies (if any): Chartered Accountant (CA), ICAEW Membership No: 5483062

Address: The Courtyard , 4 Evelyn Road , Chiswick , W4 1BZ

Date: 30 June 2026

OHSET - Independent Examiners Report for the period ended 31 December 2025

Final Audit Report

2026-06-30

Created:	2026-06-30
By:	Johnny Kritzing (johnnykritzing@me.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAA1zSJMIA7pcPOIDuLfvz5n-KvALHMxOiy

"OHSET - Independent Examiners Report for the period ended 31 December 2025" History

-  Document created by Johnny Kritzing (johnnykritzing@me.com)
2026-06-30 - 10:32:55 PM GMT- IP address: 82.31.45.254
-  Document emailed to Johnny Kritzing (johnny.kritzing@picamagroup.com) for signature
2026-06-30 - 10:32:58 PM GMT
-  Email viewed by Johnny Kritzing (johnny.kritzing@picamagroup.com)
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-  Document e-signed by Johnny Kritzing (johnny.kritzing@picamagroup.com)
Signature Date: 2026-06-30 - 10:34:30 PM GMT - Time Source: server- IP address: 82.31.45.254 - Signature Appearance Selected: TYPE
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ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

England & Wales - Charity number 1198567

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 January 2024 (Period start date) To 31 December 2024
(Period end date)

Charity name: ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

Charity registration number: 1198567

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(a) To advance the charitable education of pupils at Orchard House School of 16 Newton Grove London W4 1LB in such manner as the trustees shall think fit so long as the same shall be charitable and in particular through the award of bursaries, scholarships, exhibitions, prizes and grants to such pupils, and by making such payments as they shall in their absolute discretion determine for the development of the said school, its grounds and buildings (including the provision of recreational areas and facilities), for the purchase of books (or any other educational publications) and equipment (including musical instruments) for the said school, and by funding specialist teaching posts at the said school. (b) To support such charity or charities or for such charitable purposes as the trustees shall from time to time in their absolute discretion determine.
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 has raised funds through donations, mainly from parents at Orchard House School and the owner of the school, Dukes Education, and used those donations to fund means-tested bursaries for children at Orchard House School.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities, the trustees have given careful consideration to the Charity Commission's guidance on public benefit, and in particular to its supplementary public benefit guidance on advancing education.

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	The charity continued to fund the fees of pupils at Orchard House School, giving the pupils access to educational facilities which those pupils would not otherwise have been able to access, and providing a variety of opportunities for those pupils' development. One bursary student completed their time at Orchard House School, going on to secure a full bursary at their future secondary school. Recruitment for a new bursary student took place during the year, with an offer made to two students who commenced at the school, one in Year 3 and the other in Year 4, in September 2024. Four of the charity's trustees remained in place throughout the year, providing it with continuity of leadership and skills. In addition, three new trustees were appointed in March, bringing additional marketing and communication skills. The charity has continued to forge relationships with the leadership team at Orchard House School, the Orchard House School Parents Association and the ownership group of Orchard House School, Dukes Education.

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	There were net incoming resources of £59,092.46 during the period, resulting in a healthy end-of-year net asset figure of £197,758.18.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trustees review the finances of the Trust at each meeting and have regard to the available cash reserves and likely future income in deciding the ability to grant bursaries. The guiding principle is to hold a minimum of two terms' fees per bursary student on reserve. At present, our excess over this amount is not a concern.
Amount of reserves held	Para 1.22	£197,758.18
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	School based fundraising and parental donations are the principal source of funds.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	(a) Identifying suitable candidates for bursaries. (b) Fundraising to ensure sufficient resources to support bursaries granted.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust Deed
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	Trustees are interviewed upon application. Candidates' skills sets and biographies are circulated to all trustees, and the board then votes on appointments.

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	All trustees receive copies of relevant Trust documents and financial statements. New trustees have access to existing trustees in the event of any queries.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The trustees split the roles of fundraising, marketing and bursary student liaison between them. The Chair typically liaises with the school heads and owners and there is a Treasurer to deal with finances.
Relationship with any related parties	Para 1.51	The owner, Dukes Education, discounts the school fees of the scholar by 50% per financial year.
Other		

Reference and Administrative details

Charity name	Orchard House School Educational Trust
Other name the charity uses	
Registered charity number	1198567
Charity's principal address	16 Newton Grove London W4 1LB

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	Kimberly Groat	Trustee		
2	Alicia Heeneman-Wong	Trustee		
3	Chip Horne	Chair		
4	Sarah Roberts	Trustee	18.03.24 – 31.12.24	
5	Mina Sokmen-Kossoras	Trustee	18.03.24 – 31.12.24	
6	Lina Tebbs	Trustee	18.03.24 – 31.12.24	
7	Tracy Yam	Hon Treasurer		
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Corporate trustees – names of the directors at the date the report was approved

Director name		
None		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
None		

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

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)

--	--

Full name(s)

--	--

Position (eg Secretary,
Chair, etc)

--	--

Date

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Orchard House School Educational Trust
Registered Charity Number 1198567
Accounting Statement
Receipts and Payments Basis for period 1 January 2024 - 31 December 2024

	2024 £	£
Incoming Resources		
Donations	29,804	
Fundraising Income	29,290	
Total Incoming Resources		59,093
Resources Expended		
Charitable Activities	(23,805)	
Cost of Generating Funds		
Costs of Fundraising (including advertising for bursary students)	(964)	
Administrative Costs/Other Costs	0	
Total Resources Expended		(24,770)
Net Incoming/(Outgoing) Resources		34,324
Cash Funds at 1 January 2024		163,734
Cash Funds at 31 December 2024		197,758
Statement of Assets and Liabilities for 2024		
Cash Funds		
Metro Bank	197,758	197,758
Other Monetary Assets		
Amount due from Fundraising Activities in 2025	0	
Secured Donations in 2025	4,265	4,265
Liabilities		
Commitments made for Charitable Activities in 2025	(23,988)	(23,988)
Net Assets		178,035

All the trust's funds are unrestricted funds.

We approve the accounts and acknowledge our responsibility for them, and for providing all information and explanations necessary for their compilation.

Signed on behalf of the Trustees

Tracy Yam
Hon Treasurer

Independent examiner's report to the trustees of Orchard House School Educational Trust

I report to the trustees on my examination of the accounts of the Orchard House School Educational Trust (the Trust) for the year ended 31 December 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').

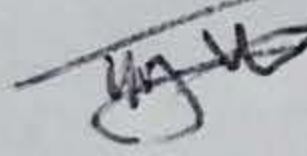
I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.

Signed: 

Name: THEO HIASOGLOU

Relevant professional qualification or membership of professional bodies (if any): ICAEW

Address: 102 CROFTON WAY EN2 8HS.

Date: 22/05/25

ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

England & Wales - Charity number 1198567

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 January 2023 (Period start date) To 31 December 2023
(Period end date)

Charity name: ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

Charity registration number: 1198567

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(a) To advance the charitable education of pupils at Orchard House School of 16 Newton Grove London W4 1LB in such manner as the trustees shall think fit so long as the same shall be charitable and in particular through the award of bursaries, scholarships, exhibitions, prizes and grants to such pupils, and by making such payments as they shall in their absolute discretion determine for the development of the said school, its grounds and buildings (including the provision of recreational areas and facilities), for the purchase of books (or any other educational publications) and equipment (including musical instruments) for the said school, and by funding specialist teaching posts at the said school. (b) To support such charity or charities or for such charitable purposes as the trustees shall from time to time in their absolute discretion determine.
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 has raised funds through donations, mainly from parents at Orchard House School and the owner of the school, Dukes Education, and used those donations to fund means-tested bursaries for children at Orchard House School.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities, the trustees have given careful consideration to the Charity Commission's guidance on public benefit, and in particular to its supplementary public benefit guidance on advancing education.

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	The charity continued to fund the fees of pupils at Orchard House School, giving the pupil access to educational facilities which that pupil would not otherwise have been able to access, and providing a variety of opportunities for that pupil's development. One bursary student completed their time at Orchard House School, going on to secure a full bursary at their future secondary school. Recruitment for a new bursary student took place during the year, with an offer made to a student, who commenced at the school in Year 3 in September 2023. The charity appointed a new Chair, following the resignation of the previous Chair, providing it with new leadership and greater continuity going forward. The charity has continued to forge relationships with the leadership team at Orchard House School, the Orchard House School Parents Association and the ownership group of Orchard House School, Dukes Education.

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	There were net incoming resources of £119,290.22 during the period, resulting in a healthy end-of-year net asset figure of £163,734.22.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trustees review the finances of the Trust at each meeting and have regard to the available cash reserves and likely future income in deciding the ability to grant scholarships. The guiding principle is to hold a minimum of two terms' fees per scholar on reserve. At present, our excess over this amount is not a concern.
Amount of reserves held	Para 1.22	£163,734.22
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	School based fundraising and parental donations are the principal source of funds.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	(a) Identifying suitable candidates for scholarships. (b) Fundraising to ensure sufficient resources to support scholarships granted.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust Deed
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	Trustees are interviewed upon application. Candidates' skills sets and biographies are circulated to all trustees, and the board then votes on appointments.

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	All trustees receive copies of relevant Trust documents and financial statements. New trustees have access to existing trustees in the event of any queries.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The trustees split the roles of fundraising, marketing and scholar liaison between them. The Chair typically liaises with the school heads and owners and there is a Treasurer to deal with finances.
Relationship with any related parties	Para 1.51	The owner, Dukes Education, discounts the school fees of the scholar by 50% per financial year.
Other		

Reference and Administrative details

Charity name	Orchard House School Educational Trust
Other name the charity uses	
Registered charity number	1198567
Charity's principal address	16 Newton Grove London W4 1LB

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	Ekaterina Barclay	Trustee	01.01.23 – 02.07.23	
2	Kimberly Groat	Trustee		
3	Alicia Heeneman-Wong	Trustee		
4	Chip Horne	Trustee / Chair	Chair from 02.07.23	
5	Petra Howard-Wuerz	Chair	01.01.23 – 02.07.23	
6	Pia Maynard	Trustee	01.01.23 – 02.07.23	
7	Tracy Yam	Hon Treasurer		
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Corporate trustees – names of the directors at the date the report was approved

Director name		
None		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
None		

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

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

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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)

--	--

Full name(s)

--	--

Position (eg Secretary,
Chair, etc)

--	--

Date

--

Orchard House School Educatinal Trust Registered Charity Number 1198567 Accounting Statement Receipts and Payments Basis for period 1 January 2023 - 31 December 2023		
	2023	£
Incoming Resources		
Donations	26,906	
One-off donation from House Schools Trust	99,761	
Fundraising Income, with associated gift aid received	6,066	
Total Incoming Resources		132,733
Resources Expended		
Charitable Activities	(11,374)	
Cost of Generating Funds		
Costs of Fundraising (including advertising for bursary students)	(1,969)	
Administrative Costs/Other Costs	0	
Total Resources Expended		(13,343)
Net Incoming/(Outgoing) Resources		119,390
Cash Funds at 1 January 2023		44,444
Cash Funds at 31 December 2023		163,734
Statement of Assets and Liabilities for 2023		
Cash Funds		
Metro Bank	163,734	163,734
Other Monetary Assets		
Amount due from Fundraising Activities in 2024	0	
Secured Donations in 2024	18,133	18,133
Liabilities		
Commitments made for Charitable Activities in 2024	(7,813)	(7,813)
Net Assets		174,054
All the trust's funds are unrestricted funds. We approve the accounts and acknowledge our responsibility for them, and for providing all information and explanations necessary for their compilation. Signed on behalf of the Trustees Tracy Yam Hon Treasurer		

Independent examiner's report to the trustees of Orchard House School Educational Trust

I report to the trustees on my examination of the accounts of the Orchard House School Educational Trust (the Trust) for the year ended 31 December 2023.

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 all 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.

Signed:



Name: THEO HASOGLOU

Relevant professional qualification or membership of professional bodies (if any): ACA/ICAEW

Address: 102 CROFTON WAY, EN2 8HS

Date: 11/06/24

ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

England & Wales - Charity number 1198567

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

**From 1 January 2022 (Period start date) To 31 December 2022
(Period end date)**

Charity name: ORCHARD HOUSE SCHOOL EDUCATIONAL TRUST

Charity registration number: 1198567

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(a) To advance the charitable education of pupils at Orchard House School of 16 Newton Grove London W4 1LB in such manner as the trustees shall think fit so long as the same shall be charitable and in particular through the award of bursaries, scholarships, exhibitions, prizes and grants to such pupils, and by making such payments as they shall in their absolute discretion determine for the development of the said school, its grounds and buildings (including the provision of recreational areas and facilities), for the purchase of books (or any other educational publications) and equipment (including musical instruments) for the said school, and by funding specialist teaching posts at the said school. (b) To support such charity or charities or for such charitable purposes as the trustees shall from time to time in their absolute discretion determine.
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 has raised funds through donations, mainly from parents at Orchard House School and the owner of the school, Dukes Education, and used those donations to fund means-tested bursaries for children at Orchard House School.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	In planning our activities, the trustees have given careful consideration to the Charity Commission's guidance on public benefit, and in particular to its supplementary public benefit guidance on advancing education.

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	The charity was registered as a charity on 8 April 2022, enabling it to become fully operational in achieving its purpose to fund the fees of a pupil at Orchard House School, giving the pupil access to educational facilities which that pupil would not otherwise have been able to access, and providing a variety of opportunities for that pupil's development. The charity expanded its trustee numbers, providing it with more resources for fundraising, marketing and governance. The charity has forged relationships with the leadership team at Orchard House School, the Orchard House School Parents Associated and the ownership group of Orchard House School, Dukes Education.

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	There were net incoming resources of £44,444 during the period, resulting in a healthy end-of-year net asset figure of £44,000.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trustees review the finances of the Trust at each meeting and have regard to the available cash reserves and likely future income in deciding the ability to grant scholarships. The guiding principle is to hold a minimum of two terms' fees per scholar on reserve. At present, our excess over this amount is not a concern.
Amount of reserves held	Para 1.22	£44,444
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	School based fundraising and parental donations are the principal source of funds.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	(a) Identifying suitable candidates for scholarships. (b) Fundraising to ensure sufficient resources to support scholarships granted.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust Deed
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	Trustees are interviewed upon application. Candidates' skills sets and biographies are circulated to all trustees, and the board then votes on appointments.

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	All trustees receive copies of relevant Trust documents and financial statements. New trustees have access to existing trustees in the event of any queries.
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Relationship with any related parties	Para 1.51	The owner, Dukes Education, discounts the school fees of the scholar by 50% per financial year.
Other		

Reference and Administrative details

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Other name the charity uses	
Registered charity number	1198567
Charity's principal address	16 Newton Grove London W4 1LB

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	Ekaterina Barclay	Trustee		
2	Alicia Heeneman-Wong	Trustee		
3	Chip Horne	Trustee		
4	Petra Howard-Wuerz	Chair		
5	Pia Maynard	Trustee		
6	Tracy Yam	Hon Treasurer		
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Corporate trustees – names of the directors at the date the report was approved

Director name		
None		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
None		

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

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)

--	--

Full name(s)

--	--

Position (eg Secretary,
Chair, etc)

--	--

Date

--

Orchard House School Educational Trust
Registered Charity Number 1198567
Accounting Statement
Receipts and Payments Basis for period 1 January 2022 - 31 December 2022

	2022 £	£
Incoming Resources		
Donations	26,379	
Fundraising Income, with associated gift aid received	26,431	
Total Incoming Resources		52,810
Resources Expended		
Charitable Activities	(6,910)	
Cost of Generating Funds		
Costs of Fundraising	(1,456)	
Administrative Costs/Other Costs	0	
Total Resources Expended		(8,366)
Net Incoming/(Outgoing) Resources		44,444
Cash Funds at 1 January 2022		0
Cash Funds at 31 December 2022		44,444
Statement of Assets and Liabilities for 2022		
Cash Funds		
Barclays	44,444	
		44,444
Other Monetary Assets		
Amount due from Fundraising Activities in 2023	0	
Secured Donations in 2023	21,934	
		21,934
Liabilities		
Commitments made for Charitable Activities in 2023	(7,619)	
		(7,619)
Net Assets		58,759

All the trust's funds are unrestricted funds.

We approve the accounts and acknowledge our responsibility for them, and for providing all information and explanations necessary for their compilation.

Signed on behalf of the Trustees

Tracy Yam
Hon Treasurer

Independent examiner's report to the trustees of Orchard House School Educational Trust

I report to the trustees on my examination of the accounts of the Orchard House School Educational Trust (the Trust) for the year ended 31 December 2022.

Responsibilities and basis of report

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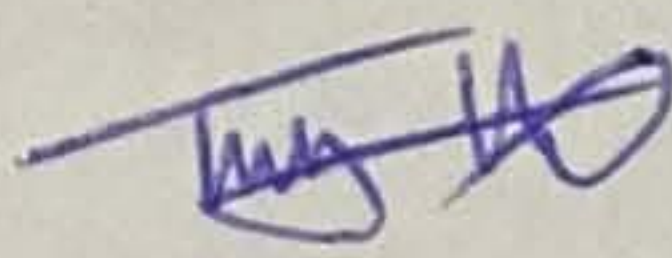
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Independent examiner's statement

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1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.

Signed: 

Name: THEO FIASOGLOU

Relevant professional qualification or membership of professional bodies (if any): ACA.

Address: 102 CROFTON WAY, EN2 8HS

Date: 06/11/23.