

# Ormskirk School Foundation Trust

England & Wales · Charity number 526703

## Details

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**Other names** ORMSKIRK GRAMMAR SCHOOL, ORMSKIRK SCHOOL TRUST, CLIFF MEMORIAL FUND, LAURA MCELROY PRIZE ACCOUNT, RALPH TOMLINSON PRIZE ACCOUNT

**Status** Registered

**Legal form** Other

**Registered** 1964-07-02

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

## Contact

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**Address** Fairhaven  
189 Wigan Road  
Lathom  
Ormskirk  
Lancashire

**Phone** 01695583040

**Email** [pjd@ormskirk.lancs.sch.uk](mailto:pjd@ormskirk.lancs.sch.uk)

**Website** [www.ormskirk.lancs.sch.uk](http://www.ormskirk.lancs.sch.uk)

## Activities

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**Objects:** THE OBJECT OF THE CHARITY IS THE PROVISION OF- (A) ITEMS, SERVICES, FACILITIES AND GRANTS FOR THE SCHOOL AND (B) SCHOLARSHIPS, MAINTENANCE ALLOWANCES OR OTHER FINANCIAL ASSISTANCE TO PROMOTE THE EDUCATION OF THE SCHOOL'S CURRENT OR FUTURE PUPILS OR ITS (OR A PREDECESSOR SCHOOL'S) PAST PUPILS UNDER THE AGE OF 25 OR THEIR PREPARATION FOR ENTRY INTO A PROFESSION, TRADE OR CALLING PROVIDED THAT ANY ITEMS, SERVICES, FACILITIES OR GRANTS FOR THE SCHOOL SHALL BE OF A KIND NOT NORMALLY FUNDED BY THE LOCAL AUTHORITY OR CENTRAL GOVERNMENT.

**Activities:** 1. Charity makes grants to students attending the school who are taking part in a variety of out-of-school activities of adventure, experiance training etc and 2. For school projects-to help and enrich student learning and experience, not normally provided from the "education budget", and 3. Provides awards to students for achievement, endeavour and reliability.

## Classification

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

## Geography

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- Lancashire

## Finances

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Period end	Income	Expenditure	Assets	Employees
2024-09-30	£19,026	£16,532	-	-
2023-09-30	£26,042	£24,649	-	-
2022-09-30	£14,603	£7,022	-	-
2021-09-30	£45,183	£44,277	-	-
2020-09-30	£31,947	£15,868	-	-

## Trustees

Name	Role	Appointed
<b>ROSE HALSALL</b>	Chair	2019-05-05
Angela Draper		2022-01-13
Edward Pope		2021-05-10
Elaine Farrer		2025-06-06
<b>GARETH DOWLING</b>		2020-11-23
Gordon Johnson		2025-06-05
Hilary Anne Rosbotham		2018-08-17
<b>JANE MARSHALL</b>		2021-04-20
<b>JOHN MERCER</b>		2023-11-01
<b>LORD EDWARD DERBY</b>		2013-06-11
Linda Webster		2019-08-17
Lisa Molyneux		2023-08-17
<b>MR A OWENS</b>		2025-06-05
Michael Wainwright		2025-06-18
<b>STUART SMITH</b>		2018-11-12

## Linked charities

- **PAROMA PRIZE (526703-1)**
- **DONNA BALMER PRIZE (526703-10)**
- **BOSWELL PRIZE FOR PHYSICS (526703-11)**
- **KIRKBRIDE PRIZE FOR GEOGRAPHY (526703-12)**
- **COOKE PRIZE (526703-2)**
- **POTTER PRIZE (526703-3)**
- **PAULA ECCLESTON PRIZE (526703-4)**
- **LAURA MCELROY FUND (526703-5)**
- **THE RALPH TOMLINSON FUND (526703-6)**
- **THE CLIFF MEMORIAL FUND (526703-7)**
- **GILLIAN EMMOTT MEMORIAL FUND (526703-8)**
- **ANDREW MEGSON MEMORIAL PRIZE (526703-9)**

**Ormskirk School Foundation Trust**

England & Wales - Charity number 526703

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# Accounts

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## Chairman's Annual Report

In April 2022 the Trust Deed was modified by the Secretary of State for Education following the conversion of Ormskirk School from a Local Authority school into an academy. The current deed did not support funding an academy and required changing. The Chairman requested that the Deed revert to an older version from 1979, which contained more detail on awarding grants. This was agreed and resulted in a Trust Modification Order from April 1st 2022, which expanded the remit of the Trust and enabled trustees to consider bids from current and former students aged under 25 years old.

The new objects of the charity are the provision of:

- a) Items, services, facilities and grants for the school and
- b) Scholarships, maintenance allowances or other financial assistance to promote the education of the School's current or future pupils or it's (or predecessor school's) past pupils under the age of 25, for their preparation for entry into a profession, trade or calling.

*Provided that any items, services, facilities or grants for the School shall be of a kind not normally funded by the local authority or central government*

In order to publicise the objects of the Trust a new web site was created, [www.osft.org.uk](http://www.osft.org.uk) and a Facebook page, Ormskirk School Foundation Trust, was utilised more within the immediate community. This resulted in ten applications for grants at the first meeting in November 2022 after the modified Trust Deed took effect. There were eight bids from former students and two from current ones. All were successful. Therefore during this 2022-2023 period the Foundation Trust was able to meet the objects of the new Trust Deed.

Rose Halsall  
Chairman  
Ormskirk School Foundation Trust

**Ormskirk School Foundation Trust**

**Statement of Account for 1 October 2022 - 30 September 2023**

Barclays Asccount 73944530

**INCOME**


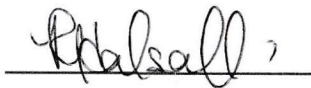
Oct 2 balance B/fwd	£ 7,581.16
COIF Deposit Acc interest	£ 1,960.54
Bank interest	£ -
Sundries	
Transfers from COIF Deposit Acc	£ 7,500.00
Ground Rent	£ 7,500.00
Cheque write off	£ 1,500.00

INCOME for year £ 26,041.70

**Prepresented by:**

Bank acc: 73944530 £ 1,391.86  
Plus assests  
Minus liabilities

Signed

**EXPENDITURE**

Achievement awards	£ 20,334.48
School Projects	£ 230.00
Clerk fees	£ 838.42
Sundries	£ 3,246.94

EXPENDITURE for year £ 24,649.84

Balance C/fwd £ 1,391.86

Mrs Paula Dowling (Auditor)

Mrs Rose Halsall (Chair/Acting Treasurer)

**Ormskirk School Foundation Trust – Audit Report**

I confirm that I have audited the Ormskirk School Foundation Trust accounts for the accounting period 1 October 2022 – 30 September 2023.

The accounts are very comprehensive and prepared to a high standard with all paperwork available to cross check income and expenditure.

I confirm that the accounts are a true and accurate record of Ormskirk School Foundation Trust accounts for this accounting period.

Signed:



Name:

Paula Dowling

Position:

Auditor (Bursar @ Bickerstaff Primary School)

Date:

22.06.2024

**Ormskirk School Foundation Trust**

England & Wales - Charity number 526703

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# Accounts

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**Ormskirk School Trust - Foundation Fund  
(Charity Number 526703)**

**Annual Report for 2020 - 2021**

The Foundation Governor Achievement Awards were made to senior pupils who had earned recognition for their achievements and/or efforts during the school year.

Due to the school being converted from a voluntary school to an academy, funds were required to be spent on legal fees to protect the charity's assets.

Investments were drawn from the COIF deposit account to meet all of the aforementioned commitments.

Rose Halsall  
Chair  
Ormskirk School Trust

Ormskirk School Trust – Foundation Fund

Statement of account for 1 October 2020 – 30 September 2021


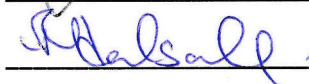
Barclays Account No: 73944530

Income		Expenditure	
Oct 2 BALANCE B/Fwd	16181.82	Achievement Awards	50.00
COIF Deposit AC interest	1.32	School Projects	0.00
Bank interest	-	Legal fees	44227.16
Sundries	-	Sundries	-
Transfers from CIOF Dep Acc	29000.00		
Cheque write off	-		
<b>Income for year</b>	<b><u>£45,183.04</u></b>	<b>Expenditure for year</b>	<b><u>£44277.16</u></b>
		<b>Balance C/forward</b>	<b><u>£ 905.88</u></b>

**Represented by:**

Bank acc: 73944530 £ 905.88  
Plus Assets  
Minus Liabilities  
**£ 905.88**

Signed:

  
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Mrs J Smith (Auditor)

Mrs R Halsall (Chair/Acting Treasurer)

## **Ormskirk School Foundation Trust - Audit Report**

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I confirm that the accounts are a true and accurate record of Ormskirk School Foundation Trust accounts for this accounting period.

Signed: J. Smith (Original Signed)

Name: Jane Smith

Position: Clerk to Lathom South Parish Council

Date: 20 July 2021

**Ormskirk School Foundation Trust**

England & Wales - Charity number 526703

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# Accounts

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**Ormskirk School Trust - Foundation Fund  
(Charity Number 526703)**

**Annual Report for 2019 - 2020**

The Foundation Trust paid for metal fencing and a gate in relation to a request from the Special Educational Needs department.

The Foundation Governor Achievement Awards were made to senior pupils who had earned recognition for their achievements and/or efforts during the school year.

A number of bids were submitted at the March 2020 meeting but unfortunately, due to Covid 19 restrictions they were postponed. They will be put forward for consideration at a later date.

Due to the school being converted from a voluntary school to an academy, funds were required to be spent on legal fees.

Investments were drawn from the COIF deposit account to meet all of the aforementioned commitments.

Rose Halsall  
Chair  
Ormskirk School Trust

**Ormskirk School Trust - Foundation Fund**

**Statement of account for October 1<sup>st</sup> 2019 - September 30<sup>th</sup> 2020**

**Barclays Account No: 73944530**

<b>Income</b>		<b>Expenditure</b>	
Oct 2 BALANCE B/Fwd	98.27	Achievement Awards	300.00
COIF Deposit AC interest	48.66	School Projects	4,528.00
Bank interest	-	Legal fees	11,040.00
Sundries	-	Sundries	-
Transfers from CIOF Dep Acc	31,800		
Cheque write off	-		
<b>Income for year</b>	<b><u>£31,848.66</u></b>	<b>Expenditure for year</b>	<b><u>£15,868</u></b>
<b>TOTAL</b>	<b><u>£31,946.93</u></b>	<b>Balance C/forward</b>	<b><u>£16,178.93</u></b>

**Represented by:**

Bank acc: 73944530                      £16,178.93

Plus Assets

Minus Liabilities

**£16,178.93**

**Signed:**

          P Dowling          

**Mrs Paula Dowling (Auditor) - original signed**

**signed**

          R Halsall          

**Mrs R Halsall (Chair/Acting Treasurer) - original**

## **Ormskirk School Foundation Trust - Audit Report**

I confirm that I have audited the Ormskirk School Foundation Trust accounts for the accounting period 1 October 2019 - 30 September 2020.

The accounts are very comprehensive and prepared to a high standard with all paperwork available to cross check income and expenditure.

I confirm that the accounts are a true and accurate record of Ormskirk School Foundation Trust accounts for this accounting period.

Signed: P J Dowling (Original Signed)

Name: Paula J Dowling

Position: School Business Manager - Bickerstaffe CE Primary School

Date: 20 July 2021