



SCCT

Sutton Coldfield Charitable Trust

**2022
2023**

ANNUAL REVIEW

Enhancing the quality of life for all in Sutton Coldfield

www.suttoncoldfieldcharitabletrust.com

SUPPORTING THE COMMUNITY

The advancement of:
The relief of need/individuals
Education
Arts/culture/heritage/science
Religion
Protection of the environment
Health/saving of lives
Citizenship/community development
Amateur sport



Registered in England and Wales No. 218627

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About the trust

Sutton Coldfield Charitable Trust (SCCT) aims to alleviate hardship and improve the quality of life for residents of the Royal Town of Sutton Coldfield through the provision of housing and by making grant awards to meet the needs of individuals and community organisations.

Historical Timeline

1528	1707	1825
Bishop Vesey, of Sutton Coldfield, persuaded Henry VIII to grant a charter in 1528 establishing a warden and society (corporation) to govern the town. The corporation was obliged to use rental and other income to provide relief of poverty and improve the locality.	Thomas Jesson, a local merchant, left land and money to provide apprenticeships for boys and to distribute bread to the town's poor. This charity was administered by the corporation and was later absorbed into municipal charities which ultimately became the trust as it is today.	After a long legal action, the corporation's charities were reorganised and enriched by lands acquired in the 1825 Enclosure Award. From this time, almshouses were built and the trust provided elementary schools (including teaching and uniforms) for Sutton's children. Practical necessities such as coal, blankets and boots were widely distributed. In pre-welfare state days, the charities financed nursing and medical care for people in need and made grants to widows.

Sutton Coldfield Charitable Trust

The trust's origins can be traced back to Tudor times.

Throughout a long history, it has improved the lives of generations of people in Sutton Coldfield, particularly those in the greatest need. It has sustained its core priority to alleviate suffering, whilst redefining and extending its benefits to reflect changing times.

1886	1974	2012
The town became a borough and the trust took over some of the functions of the corporation and various related charities within one body. This operated closely alongside the council and was administered by the town clerks. New almshouses were built, including two in the 1890s from a bequest by Frances Lingard.	At the time Sutton Coldfield became part of Birmingham, the independence of the trust was safeguarded, ensuring the continuing provision of benefits for individuals and organisations within the former borough boundaries. Although the separate historic charities have been consolidated into one charity, the trustees' fundamental aims and priorities are still very similar to those pursued by Bishop Vesey and his successors over nearly five centuries.	The name of the organisation was changed to Sutton Coldfield Charitable Trust to more appropriately reflect the trust's role within the town as an independent charity.

Board of trustees

Keith Dudley (chair)
Inge Kettner (vice chair)
Neil Andrews
Surrinder Bains (from 1 April 2023)
Andrew Burley
Cllr Diane Donaldson*
Fahmida Ismail (from 1 April 2023)
Jayne Luckett
Rita Martin (from 1 April 2023)
Dr Stephen Martin (until 30 April 2023)
Helen Miles (from 1 April 2023)
Andrew Morris
Cllr Jane Mosson*
Dr Francis Murray
Cllr David Pears*
Stuart Roberts (from 1 July 2023)
John Routh (until 1 January 2023)
Amarjit Singh (until 25 October 2022)
Cllr Simon Ward**

Contact

Write to: The chief executive, Sutton Coldfield Charitable Trust, Lingard House, Fox Hollies Road, Sutton Coldfield B76 2RJ
Telephone: 0121 794 0970 **Email:** info@suttoncharitabletrust.org
More detailed information about the trust, including details of how to apply for a grant or an almshouse, can be found on its website www.suttoncoldfieldcharitabletrust.com

Administration

Tina Swani MBA FCIM Chief executive
Pam Johnston MBE JP Almshouse manager
Robert Semple ACMA Financial director
Claire Evans ACA Finance director (From 1 February 2024)
Claire Arrowsmith FCCA Accountant
Clare Haines BA (Hons) Grants manager
Jo Williams BSc (Hons) Community grants officer
Helen Kimmet LLB (Hons) Administration manager
Donna Gibson Administrator

Almshouses

Marie Murphy Warden
Michael Mitchell Warden
Mick Hill Gardener

*Trustees nominated by Birmingham City Council
**Trustee nominated by Royal Sutton Coldfield Town Council

Vision
Mission
Values

Vision
Enhancing the quality of life for all in Sutton Coldfield

Mission
The trust aims to alleviate hardship and improve the quality of life for residents of the Royal Town of Sutton Coldfield through the provision of housing and grant awards to support individuals and community organisations

Values
Responsible; inclusive; caring; transparent; sustainable



What our values mean

- Responsible**
applies to all matters including being a good employer, caring for the environment, protecting our assets and high standard of governance.
- Inclusive**
relates to our operations, beneficiaries, staff and all those we work with; embracing equality, diversity and inclusion.
- Caring**
reflects the helping nature of the trust and its core purpose.
- Transparent**
demonstrates our commitment to openness and sharing.
- Sustainable**
ensures the trust continues to make a lasting contribution and remains in good shape for the centuries ahead.



The vision of Sutton Coldfield Charitable Trust is to enhance the quality of life for all in Sutton Coldfield.

Our grant awards have covered a wide range of needs from support to food banks, to funding towards Walmley Golf Foundation's wheelchair friendly golf course – a first for the UK.

Chair's statement

This annual review covers the twelve months to 30 September 2023, marking almost a year since the production of our five year plan. The title of the plan **"looking forward to 2028"**, signifies the date the trust will celebrate a heritage of **500 years**, having responded and adapted over the past five centuries to meet constantly changing need.

01 Keith Dudley, chair



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Throughout the year ahead we look forward to sharing further celebratory planning with organisations across the Royal Town in preparation for 2028 as the poignant 500th Anniversary of the Royal Charter.

The vision of Sutton Coldfield Charitable Trust is to enhance the quality of life for all in Sutton Coldfield. This was given heightened focus during the year as the grip of the cost of living crisis took hold. Indeed, we were proud to feature on Midlands Today at the start of 2023, when our chief executive was interviewed about the impact of the cost of living crisis and the vital work of charities and community organisations in the town.

I am particularly grateful to staff and trustees for all the work involved in responding to increasing hardship and in preparing for yet another challenging year ahead.

We have expanded our staff team by appointing a new community grants officer as we experience an increase in grant applications. Our grants process is also very dynamic, aiming to ensure those without experience of making grant applications are not disadvantaged.

We have brought a wider range of skills to the board through the appointment of new trustees. Our chief executive has worked with staff and trustees to develop a staffing capacity plan to assist in considering the impact of changing need and growing demand. This has been a part of a wider people policy review to modernise our terms and conditions of employment. I am extremely grateful to our staff for their engagement with this process.

The primary core purpose of the trust is the provision of housing.

It is heartening that the trust's Almshouse residents at Lingard House had their first outing since the pandemic in September 2023, to the Black Country Museum. I was pleased to read the Bayes Business School report that living in an Almshouse community can boost longevity by as much as two-and-a-half years. Indeed, the social activities at Lingard House have included a number of events including the celebration of the King's coronation in May.

Awarding of grants is the second, yet no less vital, purpose of the trust. Our grant awards have covered a wide range of needs from support to food banks to funding towards Walmley Golf Foundation's wheelchair friendly golf course – a first for the UK.

I am pleased that we were able to award £1,101,262 in grants during the year.

It takes a vast amount of skill and expertise to manage the trust behind the scenes in order to provide that charitable benefit. As well as our Almshouses, the trust manages around 1,000 acres of agricultural land, 15 commercial properties and an investment portfolio, with the help of our expert advisers, in order to generate the income for the provision of homes and grant awards.

I extend my gratitude to the hardworking and dedicated staff at the trust, and the leadership of our chief executive, Tina Swani.

I also welcome new trustees, Fahmida Ismail, Rita Martin, Helen Miles, Surrinder Bains and Stuart Roberts and look forward to benefiting from their fresh insights and expertise. A special thanks to Dr Stephen Martin, a former chair, who stepped down after 15 years of splendid service. Appreciation too to Amarjit Singh who stepped down in October 2022 and John Routh who stepped down due to relocation, after five years as trustee.

I would like to thank my co-trustees for their help and support throughout the year, for their dedication to the role, and for giving their time so willingly. In particular I would like to thank the chairs of our committees for their extra commitment. Finally a big **“thank you” to my vice-chair, Inge Kettner,** for her tremendous hard work in so many areas which has made my job so much easier.

Keith Dudley
Chair



02 Penn’s Primary School, sensory room



03 The Deanery C of E Primary School – launch of a new play facility at the school



04 Successful Ageing CIC – Diwali Celebrations

05 The Jericho Foundation 30th Birthday Celebrations

Chief executive's 2022/2023 report

With so many highlights during the past year, I have focussed on the aspects that have really contributed to enhancing the quality of life for all in Sutton Coldfield.

In addition, the centre pages provide a concise impact report on the difference made through our grant awards.

Launching the SCCT five year plan

We launched our five year plan **"looking forward to 2028"** in May 2023, when we met with 60 local stakeholders, at the trust's Working Together event at the Trinity Centre. This included sharing the findings of the Social Needs Review that was commissioned by the trust during 2019-2023 (extended due to the pandemic). As a result of the event, the trust gained vital feedback from community groups, built new community connections, and raised the profile of our grants programme to those who did not know that they could benefit from applying for a grant award.



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01 Tina Swani MBA FCIM, chief executive

The aims of the **five year plan** have also been shared at Royal Town Council forums such as the Sutton Coldfield Health and Wellbeing Partnership and the Sutton Coldfield Town Centre Regeneration Partnership. Specific aspects of that plan have also been discussed with local councillors in Sutton Coldfield and colleagues at Birmingham City Council. **The SCCT five year plan** and the summary report of the Social Needs Review are both available on our website.

This level of collaboration is already supporting progress of the five aims in the plan:

1. Almshouses research and assessment of future need

We have commissioned research for the first half of 2024 to look specifically at housing needs in Sutton Coldfield. This will help us to consider whether a new type of almshouse scheme may potentially serve a more diverse range of beneficiaries.

2. Grants programme expansion

The trust's grants budget for 2023-2024 has been increased from £1.2m to £1.5m. This includes raising the amount for school clothing grants to £90,000. The trust awarded £80,800 of school clothing grants during 2022-2023. We welcome our new community grants officer, Jo Williams, to support this expansion.

3. Supporting heritage, green spaces and community

The chair and chief executive have been invited to join a planning group for the 2028 celebrations of the 500th Anniversary of the Town's Royal Charter. In addition, grant awards continue to support heritage, community and green spaces such as an award to replace the Newhall Valley Park boardwalk and also grants supporting Sutton Coldfield events in Birmingham Heritage Week.

4. Being well run, efficient, accessible and inclusive

A grants software system is being installed to enable us to improve the process for administering grants as well as learn more from grants applications and monitoring. This will enable us to better understand the wide range of needs and diversity across the population of Sutton Coldfield as well as the impact of our grant awards.

5. Continual improvement of assets and their use

The second phase refurbishment of kitchens and bathrooms in the trust's 46 Almshouses were completed during the year.



Equality, diversity and inclusion

Equality, diversity and inclusion (EDI) is an embedded priority throughout the five year plan. We have awarded a number of grants that support inclusion of those who may otherwise be marginalised from mainstream activities; we have been extremely proud to support such applications from community centres, local groups, sports clubs and schools. I have joined events run by the Birmingham Race Impact Group and the Economic Justice Forum to engage with others to improve inclusion and equality across the city.

Learning how to make a positive environmental contribution

is a regular theme throughout the five year plan. We commissioned an energy audit of our estate at Lingard House, Walmley, to understand the potential for saving and generating energy.



01 SCCT Five Year Plan launch at the Working Together event

Staff, trustees and advisors

The trust has a small and exceptional team of 11 staff in total, most of whom work part-time. All have made an incredible difference in both implementing ongoing improvements as well as managing the many facets of running the trust.

The trust is governed by 16 trustees bringing diverse insights and expertise. In November 2023, staff and trustees held an away day to look at progress since the five year plan was produced and whether there are other factors we should consider in the years ahead.

I am particularly grateful to staff and trustees for the efforts of the past year and also to our advisors who contribute professional specialisms such as property management, human resources, PR and communications, legal advice, investment advice, and IT support.

Financial performance

The trust’s assets have grown by £1,110,000 to a total of £73,191,000. Out of the 1,000 acres of land holdings, 83 acres of this land falls within the Langley Sustainable Urban Extension area, allocated for the development of around 5,000 homes with land sales in progress.

The end of year financial results are very positive, putting us in a strong position to continue to make a difference in Sutton Coldfield.

Total income in the last year was £2,222,000 and total expenditure was £2,223,000 including grants of £1,101,262. This, together with investment gains of £1,111,000 resulted in the net growth in funds of £1,110,000. The Trust also spent over £470,000 in capital expenditure on the second and final phase of new kitchens and bathrooms for our Almshouses.

On behalf of all staff and trustees I wish finance director, Rob Semple, a happy retirement and welcome his successor Claire Evans. Rob leaves a remarkable legacy through his many achievements in overseeing IT improvements, asset management and finances of the trust.

Finally, my thanks go out to all residents of Sutton Coldfield for all you do. I am only too aware that the good neighbours of this Royal Town make a tremendous difference in these austere times. In an historic year that has seen the coronation of HM King Charles III, it is clear that there is a strong heritage of community spirit throughout all sectors and neighbourhoods that is essential for everyone to thrive.

Tina Swani MBA FCIM

Chief executive



02 Sutton Coldfield Community Games

How to make a grant application

In the year 2022/2023, Sutton Coldfield Charitable Trust awarded grants to individuals and organisations amounting to £1,101,262.

How to make a grant application

- Contact the trust, either by letter, email, the website, or by telephone.
- Outline your needs and request a copy of the trust’s guidelines for applicants.
- It is usual for organisations that a period of three years has elapsed after receipt of a capital grant, before a further application is considered.
- If appropriate, seek a meeting with a member of staff to discuss your application.
- Ensure that all relevant documents, including estimates and accounts, reach the trust by the requested dates.

How grants are awarded

The trust deals with all grant applications as quickly as possible and without unnecessary bureaucracy. An email, a telephone call, or even an answer-phone message, is all that is needed to commence contact.

Applicants receive clear written guidelines, helping them to assemble the information required by the trustees.

The Grants Committee meets regularly (at least eight times each year) and receives carefully researched reports from the trust’s staff, who present evidence from meetings, visits, telephone call, documents and accounts.

Applicants sometimes meet staff, either virtually via Zoom, at the trust’s offices or at their own locations.

The trustees look very closely at the potential public benefit of applications, either in improving the quality of life for individuals or to enhance facilities within the local community.

They also study applicants’ finances and other commitments, assessing how far these demonstrate their need for help. Sometimes, further information is required and decisions are deferred until a subsequent meeting.

This is particularly relevant if an organisation has unrestricted reserves of more than six months operational costs.

If the recommended award is for more than £55,000, it is referred to the full board of trustees (which meets quarterly) for a final decision.

School clothing grants are approved by the grants committee, following reports from the trust’s staff.

The trustees strictly observe the requirement that all requests must benefit residents of Sutton Coldfield. Only a few applications are accepted from organisations based elsewhere.

These applicants must demonstrate that they are providing essential benefits not otherwise available locally. In practice, these include hospices, specialist hospital treatments and provision for people with disabilities.

To ensure that grants are only used for their approved purpose, payments are usually made directly to suppliers on presentation of invoices. For school clothing grants, the trust gives vouchers to parents and carers that can only be spent at specified retailers.

The trustees realise that some groups and individuals might still be unaware of the trust’s work, despite considerable local publicity. However, it is hoped that, through advertising and the trust’s informative website: www.suttoncoldfieldcharitabletrust.com those who are most in need of help will easily be able to find out how to make contact.

The trust also welcomes notification from members of the community and organisations, schools, GP surgeries etc, who know of people who may benefit from the trust’s assistance.



During 2022/2023, the trust received 96 applications for grants and the majority received awards. School clothing grants, benefitting 808 children, were also approved.

Grants well spent

Making sure that grants are well spent

How the trust evaluates the benefits:

The trust maintains close contact with organisations to ensure that the anticipated benefits from the grant have been achieved.

For example, has the purchase of a minibus been effective in transporting the elderly to events or scout groups to camp? Has investment in supporting children with autism met the needs of both children and parents? Has investment in the local primary school outdoor education facilities provided benefit to the school?

A formal monitoring process is also in place.

This enables trustees to focus on those projects delivering the greatest impact. Dependent on the value of the award, this is achieved by completion of a monitoring form at the conclusion of the project. Where necessary, further interim reports are produced.

Quarterly reports providing an overview of project progress, are made available to the trustees for scrutiny.

Trust officers also evaluate impact through meetings, both in-person and online, telephone discussions and visits to grant beneficiaries. In-person visits to beneficiaries continued this year. However, a number of other monitoring methods remained in place for overseeing projects i.e. online video meetings, virtual tours and photographs that show progress and completion of projects.



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- 01 Lingard House coronation cake
- 02 St Joseph's Primary Catholic School, outdoor area
- 03 Penn's Primary School, sensory room

During 2022/2023 the following trustees were members of the grants committee:

Keith Dudley Chair until 19 July 2023
Inge Kettner Chair from 19 July 2023
Andrew Burley
Jayne Luckett
Rita Martin from 1 April 2023

Dr Stephen Martin until 30 April 2023
Cllr J Mosson
Cllr D Pears from 9 November 2022
John Routh until 1 January 2023
Surrinder Bains from 8 Nov 2023

Grant Impact Statement

The trust aims to support a broad range of organisations and activities that share a commitment to making a positive impact to the lives of the communities in the former Borough of Sutton Coldfield and have effective solutions to helping those most in need.

The trust also supports individuals in need, by reason of youth, age, ill-health, disability, or other disadvantage, through funding applications for items such as domestic equipment, further education and to meet other needs.

In the year 2022/2023, Sutton Coldfield Charitable Trust awarded grants to individuals and organisations amounting to £1,101,262.

Amount awarded
£1,101,262



96
Number of grants



Average grant size
£11,471

16 New organisation beneficiaries



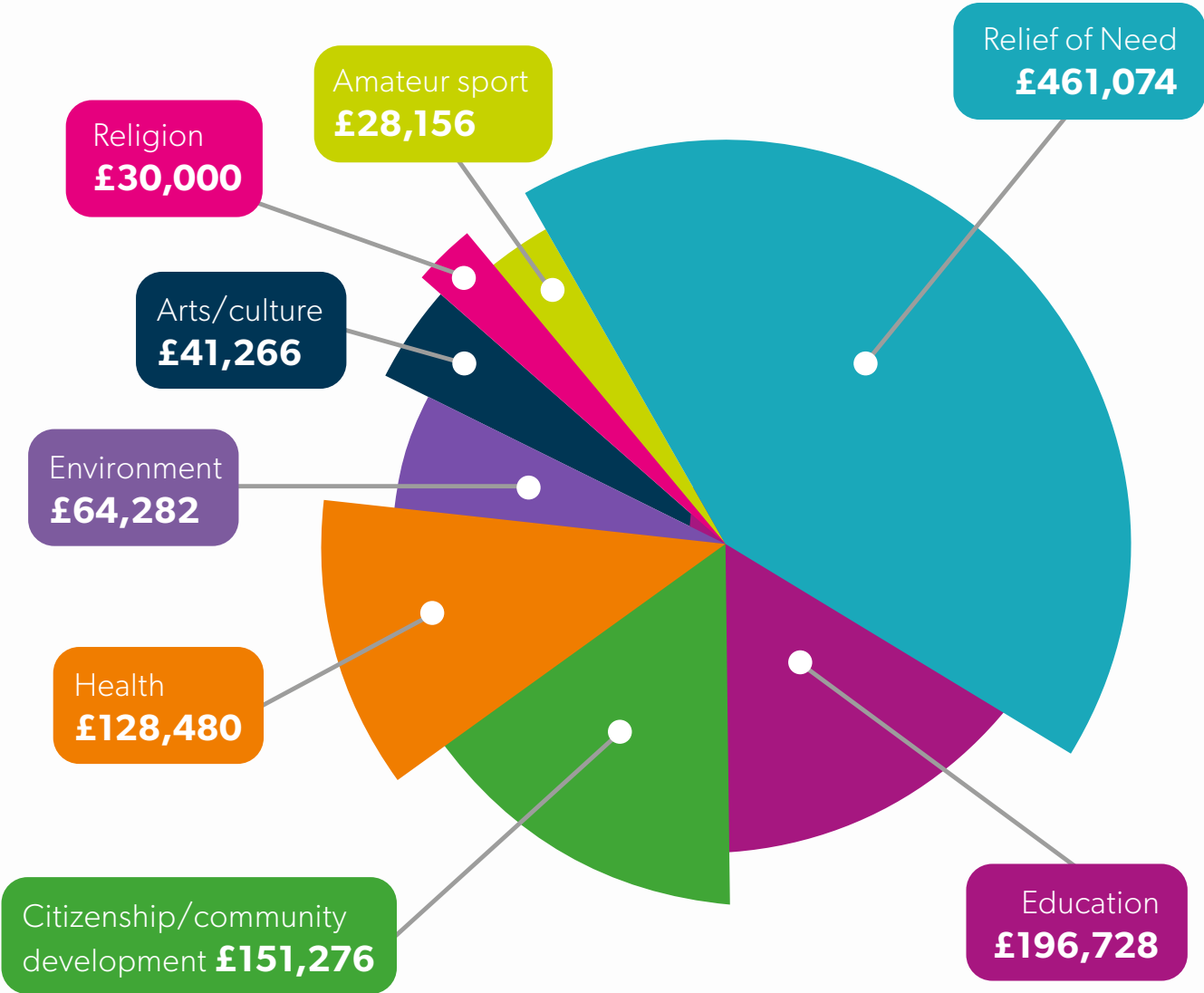
97%
Successful organisation awards

Successful individual awards



95%

Grants awarded by benefit category



Case Studies

Highlighting the impact of grants at a local level.

The cost of living crisis and the recovery from covid-19 continued to have an impact on grant beneficiaries this year.

The trust worked with organisations, by re-purposing existing grants or extending the term of grants for some projects to assist, when required.



Key themes emerging this year included the need to support local communities, groups and organisations through the cost of living crisis.

Some beneficiaries required additional funding and there was a greater need to support organisations through a challenging financial period to safeguard the delivery of their services for the future.

Providing relief of those in need has always been at the core of the trust’s purpose.

The impact of the cost of living crisis saw a rise in demand for food bank support within local communities, with trustees recognising the need for grant support.

During the last 12 months, the trust continued to support the provision of food banks in Sutton Coldfield by awarding grants to local food pantries, community dining projects and grants to two local food banks: **Hope Food North Birmingham** and **Sutton Coldfield Baptist Church food bank**.

Hope Food North Birmingham CIO

Hope Food North Birmingham is a volunteer-run food bank, set up as a Charitable Incorporated Organisation, which operates from temporary premises. Its aim is to relieve poverty and financial hardship among those affected by food poverty in Sutton Coldfield and North Birmingham.



01 Hope Food food bank volunteers

They provide fresh fruit, vegetables and bread, essential food bags and milk and eggs to those in need, running three pop-up food bank events in the community each week and redistributing any surplus food left over to other food banks. The group achieves this by collecting surplus food from local supermarkets, organising public food donation points at local shops, churches and Sutton Coldfield Town Hall, as well as purchasing food thanks to financial donations.

Impact of funding:

£69,897 funded across three grants since 2022

Number of Sutton Coldfield residents supported on a weekly basis: 450

Number of donation bins around Sutton Coldfield: 17

SCCT contribution towards content of essential food bags: 60%

Without question the heart of Hope Food is the **98 dedicated active local Sutton Coldfield volunteers** who selflessly give their time and effort to make this happen. To run Hope Food for one week requires a team of 50 volunteers.

Hope Food’s pop-up food bank sessions are currently held each week in Falcon Lodge, Mere Green and Stockland Green in Erdington. Borne out of the Hope4Sutton charity that supported residents during the covid-19 crisis, Hope Food North Birmingham was launched at the end of the pandemic to address a growth in food poverty in Sutton Coldfield and the surrounding areas. The driving factors behind the issue was the rising unemployment and accumulating debt caused by the pandemic, covid related long term illness and isolation, changes in benefits following the pandemic and the growing impact of the cost-of-living crisis.



01 Hope Food food bank

Residents who visit the food bank can often get additional help to maximise their incomes and get access to health, employment, and training advice thanks to support from a range of agencies including Birmingham Social Services staff and advisors from Our Place advice services.

These grants from the trust have helped Hope Food continue to grow, generating more donations and helping more and more people. **The number of donation bins around Sutton Coldfield has increased from 12 to 17.** The weekly number of people supported by its pop-up food banks and deliveries has increased from 300 to 450 since the summer of 2022. The funding has ensured that all of these people have been provided with a consistent bag of essential food and fresh milk and eggs, which are a quality staple.

Trustee Brian Woolcock added: “The pop-up food banks are very much needed, but we also work with Social Services, Our Place and churches, who make referrals, which lead to weekly food parcel deliveries. These are for people who are disabled, have mental health issues or for other reasons need us but are unable to get along to one of the pop-up sessions. We also handle emergency food parcel deliveries through referrals.”

Trustee Deb Middleton said: **“The grant from SCCT has been absolutely critical in helping us do what we do. If you visit one of our pop-up food banks, 70% of the food there is collected from supermarkets each week. However, the other 30% is in essential food bags. Each week we have to buy content for those bags and every week SCCT pays for 60% of the costs”.**

SCCT’s grant also covers the rental of the Sutton venues we use and 60% of the back-office costs such as insurance and accounts. Last year we introduced fresh eggs and milk to give out every other week, which is another thing that SCCT is helping us fund through their grant.”

Trustee Teresa Clemence said: **“The funding we receive from Sutton Coldfield Charitable Trust is helping us to make a real difference to so many people.”**



Sutton Coldfield Baptist Church food bank

For more than a decade, local people impacted by food poverty have made the trip up Trinity Hill, in the centre of Sutton Coldfield, to receive much-needed help from the Sutton Coldfield Baptist Church’s food bank. The food bank operates in the church hall building on Monday from 12noon until 3pm, and from Tuesday to Friday from 10.30am until 3pm. Visitors are able to access support once a week for a bag of tinned and boxed foods, which aims to provide at least three meals over three days.

The food bank was launched in October 2011 following Harvest Festival, which collected a store of food as a start-up. However, over the last ten years there has been a steady increase in need. Then, in 2020, the pandemic created a sudden rise in demand, which has continued and still remains high.

The Sutton Coldfield Baptist Church food bank were awarded three grants by Sutton Coldfield Charitable Trust during 2022/2023.



01 Sutton Coldfield Baptist Church
02 Sutton Coldfield Baptist Church food bank

Impact of funding:

£94,900 funded across three grants since 2022

Number of Sutton Coldfield residents/families registered with the food bank: **415**

Total Sutton Coldfield residents supported since 2022: **887**

Estimated **£100,000** of food given out in food bags during 2022

In September 2023, they were awarded a further grant of £44,900 to support their invaluable food poverty work for residents of Sutton Coldfield for a further 12 months.

There is a clear need for the service provided by the food bank, and others like it in Sutton Coldfield. In 2021, 720 people registered with the food bank, many visiting just once or twice, but about 10% are considered regular visitors.

On average, **250 different people were seen in any one month** with an average of **33 new people each month**. No visitors are refused because of their age and no membership fees are paid. Of the 1045 names on the food bank's register, 415 are resident in Sutton Coldfield, with the rest being from North Birmingham area. Of those Sutton residents, the 415 names represent 593 adults and 294 children, **a total of 887 individuals helped.**

Manager Georgina Whateley said: "The majority of people are seen once, twice or maybe three times, but we have some people who come a little more regularly so we try to signpost them onto other agencies to help sort out any issues they may have. We are here for people who really are in crisis, and just simply need to eat. We get a lot of donations from the church – both food and money, but we have some other churches that help us too, along with schools that help us at Harvest and businesses at Christmas. It is something that the whole community contributes to."

The grants awarded to the food bank by SCCT specifically fund the bags of food provided to each visitor. **Last year it is estimated that £100,000 of food was given out.** The majority of this was donated goods, with £17,039 donated in monetary gifts. £30,299 was spent from reserves to meet the shortfall.

Georgina added: **"The money from the trust has been so incredibly useful. It has been used to buy food, paying for our wholesale bills which works really well as it drip feeds money into the food bank, helping us control what's coming in and what's going out.**

A small team operates the food bank. It is managed by a paid church employee, with the **support of 19 invaluable volunteers**. Those volunteers get to know many of the people who use the food bank, and understand the issues that underly their food poverty.

Georgina said: "For the last few years mental health issues have heightened, and because we're a church we like to spend some time with them and have a coffee morning every week to give them an opportunity to chat to someone. One thing that is so important is that people feel welcome and comfortable coming here. It's a huge part of the ministry of the church for us, it's so important. We are very grateful for the support that the trust has given us over the last few years, and we hope to continue to gain its help as we strive to help those in need."



03 Successful Ageing CIC - Workshop participants

“Successful Ageing is a tailored program which is **supporting the over 60's population** across the BAME/local community.

Grants awarded

Grants totalling **£356,367** were provided for the relief of those in need across 33 organisations.

In addition, Schools Clothing Grants reached record levels again this year with £80,800 providing support to **808 children** through 451 successful family applications.

Personal grant awards also increased to £23,907 with 20 grants between £214 and £8,000 awarded to individuals and families for items as diverse as the provision of essential domestic equipment, home repairs and educational support.

“ The **relief of those in need** by reason of youth, age, ill-health, disability, financial hardship or other disadvantage.



Relief of those in need

The relief of those in need has always been at the core of the trust’s purpose.

In April 2023, Walmley Golf Foundation CIC was awarded a grant to build a disability friendly putting green suitable for mobility equipment.

The specially-designed green will be installed at Walmley Golf Club, where members first set up the foundation in 2017 with the aim of making golf more relevant and accessible to those within Sutton Coldfield.

Since then, the Foundation has provided and funded golf sessions for in excess of 1000 participants from more than 40 organisations. The new disability friendly putting green will allow access to people with mobility issues such as paraplegics, amputees, stroke victims, wheelchairs users and people using walking aids. The project represents a major step forward in its work, and could be copied at golf clubs across the country.



01 Artist impression looking towards range building at Walmley Golf Club

02 Trustees of Walmley Golf Club Foundation CIC

SCCT
Sutton Coldfield Charitable Trust

For many years, the trust has supported local elderly residents in sheltered accommodation or retirement accommodation and other organisations with a contribution towards their Festive Celebrations. **This year, grants totalling £16,055 were awarded to 23 groups, benefitting around 900 individuals.**

A photograph of an elderly woman with short white hair and glasses, smiling warmly. She is wearing a patterned shawl and holding a white cup of tea. In the background, there is a decorated Christmas tree and a wrapped gift.

Relief of those in need

£80,800	School Clothing Awards 2023	808 Children
£48,250	Age Concern Birmingham	Towards 2 year's funding of Community Advice
£44,900	Sutton Coldfield Baptist Church food bank	Towards purchasing food and essential items for the Sutton Coldfield Baptist Church food bank
£44,500	Walmley Golf Club Foundation CIC	Towards improving disability access at the club
£43,767	Hope Food North Birmingham CIO	Towards supporting food bank provision
£42,845	Spitfire Advice and Support Services	Towards employing a full time Money Advice Case Worker for 12 months
£38,928	Home Start Birmingham North West	Towards reinstating stay and play facilities in Sutton Coldfield
£33,659	New Heights Warren Farm Community Project CIO	Towards the cost of the Sutton Coldfield Domestic Abuse Project for three years
£19,457	Sutton Coldfield YMCA	Towards refurbishment of "The Lodge"
£13,517	FoodCycle	Towards the delivery of a community dining project
£10,489	Falcon Lodge Food Pantry	Towards supporting the delivery of Food Pantry services
£2,000	Lingard House Residents	Festive Celebrations
£1,116	Homehall House Residents	Festive Celebrations
£1,080	Hellaby House Sheltered Housing	Festive Celebrations
£1,050	NS (RAF) Association - Sutton Coldfield	Festive Celebrations
£954	Hargreave Close Social Group	Festive Celebrations
£900	Falcon Lodge Chapel 3GF	Festive Celebrations
£828	Tudor Court Residents	Festive Celebrations

£738	Calder Drive Social Group	Festive Celebrations
£720	Jacobs Well Coffee House - Festive	Festive Celebrations
£630	St. Chad's Church - Sunshine Café	Festive Celebrations
£630	Copenhagen Mews Social Club	Festive Celebrations
£618	Glovers Trust Almshouses	Festive Celebrations
£612	Boldmere Methodist Church - Smilers Club	Festive Celebrations
£540	Tanners Close Residents	Festive Celebrations
£540	Sutton Coldfield URC Widowed Group	Festive Celebrations
£540	Ley Hill Tea Club	Festive Celebrations
£540	FOLIO Sutton Coldfield Elderberries	Festive Celebrations
£450	Owen Court Residents	Festive Celebrations
£414	Heron Court Residents	Festive Celebrations
£372	Park Court Residents	Festive Celebrations
£288	Riland Court Social Group	Festive Celebrations
£270	Sons of Rest	Festive Celebrations
£225	Birmingham Ileostomy Association	Festive Celebrations

£ 437,167 Relief of those in need

The advancement of

education

Let's learn

The trust has supported the advancement of education since the 1700s.

In recent years, trustees have agreed a revised scheme to support Sutton Coldfield schools

The School Grants Scheme operates on a three-year cycle, to ensure that all eligible schools can apply within that time frame. Schools are prioritised by the date of the last grant awarded and the amount of grants provided over a 10-year period. Grants are awarded to support projects and the purchase of items not generally statutorily funded.

During the past year, £191,938 was awarded to support projects at three secondary schools and seven primary schools. As a result, 7,099 pupils benefited from the funding made available to support extra-curriculum activities, IT upgrades and improved teaching spaces.

In addition, a grant of £4,790 was awarded to support the delivery of British Sign Language workshops.



01 Penn's Primary School, sensory room

02 St Joseph's Catholic Primary School, outdoor learning

Penn's Primary School was awarded a grant to develop a new multi-sensory room to help meet the sensory needs of children and provide a calming multi-sensory environment for relaxation and interaction.



The trust has also supported projects focusing on improving outdoor areas. This included a grant to **St. Joseph's Catholic Primary School** to improve the outdoor learning provision and a grant to the **Deanery C.E Primary School** to support the build of a new key stage 2 play area.

£35,068	Fairfax Academy	Towards creating two purpose built intervention hubs
£33,000	The Arthur Terry School	To support extra-curriculum activities, enhanced provision and train student wellbeing ambassadors
£25,438	Plantsbrook School	Towards converting two standard classrooms into hybrid teaching spaces
£19,800	The Deanery C.E Primary School	Towards developing a new key stage 2 play area
£18,480	Maney Hill Primary School	Towards purchasing laptops and iPads
£18,140	St. Joseph's Catholic Primary School	Towards development of outdoor areas
£14,476	New Hall Primary School	Towards developing an immersive sensory room
£9,284	Penns Primary School	Towards a new sensory room
£9,152	Minworth Junior & Infant School	Towards new build related classroom equipment
£9,100	Holy Cross Catholic School	Towards updating and making improvements to IT resources at the school
£4,790	BSL Silver CIC	Towards the running costs of British Sign Language workshops for a 12-month period

£196,728 Advancement of education

The advancement of the arts, culture, heritage or science

The arts, in their widest sense, are supported by the trust and a number of Sutton Coldfield organisations have benefited from awards over many years in their provision of high-quality music and entertainment for residents.

Over the last 12 months, a total of £41,266 was awarded to projects focusing on the advancement of arts.

£24,869	Apollo CIO	Towards the delivery of three musical and performing-arts based community projects
£7,090	Sutton Coldfield Heritage Network	Towards a programme of events and activities to support Birmingham Heritage Week 2023
£3,486	Script Youth Musical Theatre Company	Towards purchasing a portable wireless microphone system
£2,296	Sutton Coldfield Photography Club	Towards purchasing equipment for the photography club
£2,000	The People's Orchestra	Towards equipment costs and venue hire
£1,525	SC Choirs CIO	To fund a schools "Get Singing" event

£41,266 Advancement of arts, culture, heritage or science

Sutton Coldfield Heritage Network received a grant of £7,090 to deliver a programme of events and activities to support Birmingham Heritage Week 2023. Birmingham Heritage Week has taken place for many years every September, tying in with national Heritage Open Days which have been operating for over 25 years. The Sutton Coldfield based programme of events included walks, talks, tours, open days and a photography competition. The celebrations culminated with a magic lantern show, using slides of historic Sutton Coldfield, with acting, costumes and music.



01 Sutton Coldfield Heritage Network
02 Sutton Coldfield Heritage Open Week Event - New Hall tour
03 Sutton Coldfield Heritage Open Week Event - Henry VIII and Bishop Vesey

The advancement of religion

Sutton Coldfield United Reformed Church received a grant of £30,000 to deliver a programme of capital works and improve energy efficiency through the installation of solar panels.



01 Sutton Coldfield United Reformed Church

£30,000	Sutton Coldfield United Reformed Church	Towards refurbishment works and capital works to improve energy efficiency
---------	---	--

£30,000 Advancement of religion

All faiths make a major contribution to the community life of Sutton Coldfield and the varied support services they offer to a wide range of residents is recognised by the trustees.

The church has over 100 adult members and welcomes the local community to worship, pray, find peace and quiet, support, fellowship, friendship, nourishment and healing. The Church reaches out to the local community through the Café Oasis Community Cafe, Food4U food bank, Parish Nurse service, Uniformed Organisations, Messy Church and via the many local groups that hold activities and meetings on the premises.

The grant enabled the refurbishment of the ground floor toilets and the first-floor bathroom to include modern sanitaryware and a shower to be used by those most in need. Plus, the installation of solar panels helped the Church meet their commitment to reduce their consumption of fossil fuels as well as being more cost effective.

The advancement of environmental protection or improvement

Sutton Coldfield is fortunate to have an expanse of open spaces, allotments and nature reserves within its boundaries.



01 EcoGrow CIC

EcoGrow CIC applied for funding to **deliver environmental wellbeing** activities at Sunnybank Road allotments in Boldmere. **A grant of £20,492** was awarded to support the growth of a thriving allotment community, a women’s wellbeing group, an outdoor pre-school group, extra-curriculum activities and environmental education to schools and local groups.



02 Four Oaks Tennis Club

Four Oaks Tennis Club and **Boldmere St Michaels Bowling Club** both received grants to install **LED floodlights** at their premises, reducing both energy costs and consumption and enabling facilities to be used to their full potential.

£32,880	Four Oaks Tennis Club	Towards installing LED floodlights across 8 tennis courts
£20,492	EcoGrow CIC	Towards delivering environmental wellbeing activities
£10,910	Boldmere St Michaels Bowling Club	Towards installing LED floodlights

£64,282 Advancement or improvement of environmental protection

The advancement of health or the saving of lives

The Recovery Foundation works with people in recovery from any severe mental illness that impairs a person’s ability to live happily and independently. The Foundation’s work sits outside of statutory services, supporting extremely vulnerable people, who would otherwise receive limited help. In 2022, it supported 236 individuals.



01

The trust awarded a grant of £25,280 to support the delivery of a **mental health** creative arts programme. Creativity has long been linked to mental wellbeing with benefits including reduced stress, reduced social isolation and improved wellbeing. The grant will enable the Foundation to support 60 people per year through therapeutic and creative arts.

Successful Ageing CIC secured a grant of £15,240 to raise awareness of women’s health, specifically around the perimenopause and menopause. The project aims to deliver early intervention workshops to reduce menopause related silent ailments both physical and psychological.

01 Successful Ageing Yoga Group

Grants totalling £128,480 were made to eight organisations which provide invaluable health support to the residents of Sutton Coldfield.



02

Trustees awarded a grant of **£5,000 to Leukaemia Care** to help fund a hospital support worker at Good Hope Hospital and develop the Hospital Support Hub. The project will help patients by offering advice, emotional support and signposting to services.

Leukaemia Care
YOUR Blood Cancer Charity

02 The Recovery Foundation

£40,000	You're Cherished CIO	Towards two mental health support programmes in Sutton Coldfield schools
£25,280	The Recovery Foundation	Towards a Mental Health Creative Arts Programme
£20,000	Love Life Again - Grief Recovery Coaching CIC	Towards up to 12 months funding of Grief Counselling Sessions to families in need
£15,240	Successful Ageing - Women, Health and Hormones	Towards delivering women’s health and hormones workshops
£12,808	Sutton Coldfield MS Society	Towards the delivery of a reflexology therapy service for people who are affected by MS
£5,132	Birmingham Ileostomy Association	Towards funding several post Pandemic activities
£5,020	NCT Sutton Coldfield	Towards the operational costs of the NCT Sutton Coldfield support groups
£5,000	Leukaemia Care	Towards the provision of a hospital support worker at Good Hope Hospital

£128,480 Advancement of health or the saving of lives

The advancement of citizenship or community development

Sutton Coldfield Community Games secured a grant of **£36,000** to help deliver the Community Games and Accessible Community Games for three years from 2023-2025. The Sutton Coldfield Community Games was established in 2012 as a precursor to the London Olympics and has grown into a true community event, bringing together numerous sport clubs, sponsors, partners, schools, emergency services, ambassadors, dignitaries and individuals.

- 01 Sutton Coldfield Community Games
- 02 Lingard House residents celebrate the King’s Coronation



Since 2019, a separate Accessible Community Games has been delivered engaging people with physical and learning difficulties. The activities offered have steadily risen each year and now include **60 Community Games activities and 30 Accessible Community Games activities** for attendees to participate in.

Securing the grant enabled the team to maintain and deliver the well-established event for the local community, support improvements to volunteer engagement, improve accessibility provisions and support activity providers.

The trust awarded grants totalling **£1,750 to five established organisations** across Sutton Coldfield to support the wonderful celebrations taking place to mark the Coronation of King Charles III.

Many of the groups were regular recipients of **SCCT Festive Celebration Grants** and celebrated the occasion through street parties and afternoon teas.



£44,000	St James Church Hill, Mere Green	Towards improving accessibility and community facilities at the church
£43,800	Our Place Support - Mentoring 23/24	Towards match funding the 2023-2024 School Mentoring Scheme
£36,000	Community Games CIC	Towards the delivery of the Sutton Coldfield Community Games and Accessible Community Games 2023-2025
£15,420	Xpress-Yourself Dance CIC	Towards operational costs
£10,306	Our Place Support CIC (Operational)	Towards revenue costs at the Community Hub for a 12-month period
£350	Lingard House Residents	Celebratory Grant to mark the King's Coronation
£350	Tudor Court Residents	Celebratory Grant to mark the King's Coronation
£350	Hargreave Close Residents	Celebratory Grant to mark the King's Coronation
£350	Homehall House Residents	Celebratory Grant to mark the King's Coronation
£350	Calder Drive Residents	Celebratory Grant to mark the King's Coronation
£151,276 Advancement of citizenship or community development		

The advancement of amateur sport

A total of £28,156 was awarded to amateur sports projects over the last 12 months.



Supporting initiatives that inspire people into sport and improve access for all ages and abilities.

Walmley Bowling Club has been at the heart of the village for 120 years, providing a healthy activity, friendship and competitive bowling. Last year, the bowling club received a grant of £4,600 to replace pathways around the bowling greens. This enabled the club to provide a safe environment for the local community to take part in the sport and enjoy the social interaction.

£20,656	Boldmere Swimming Club	Towards purchasing club equipment
£4,600	Walmley Bowling Club	Towards replacing pathways around the bowling greens
£2,900	Paget Rangers Football Club Juniors	Towards funding a sustainable group of coaches and match officials

£28,156 Advancement of amateur sport

Boldmere Swimming Club is one of the longest established swimming clubs in the Midlands, predominately operating from Wyndley Swimming Baths. They compete in Junior and Senior Leagues along with Open Meets and are regularly placed high in the Midlands rankings.

A grant of £20,656 enabled the club to purchase equipment required to support club sessions, training and competitions.



01 Walmley Bowling Club
02 Boldmere Swimming Club

The Walmley almshouses

The trustees are committed to the long-established tradition of providing almshouses for older people living in the Royal Town, which began in the early 1820’s and they believe that the special nature of the homes makes them as relevant today as in the past.

The Almshouse Longevity Study, which was released in May 2023 and carried out by the Bayes Business School, states that living in an almshouse can boost the longevity of its residents by as much as two-and-a-half years compared to those living in the general population.

Analysing up to 100 years’ worth of residents’ records from various almshouses in England, the research suggests that living in these communities can reduce the negative impact on health and social wellbeing which is commonly experienced by the older population, particularly those who are living in isolation.

Residents live independent lives but benefit from the security and presence of two wardens, Marie Murphy and Michael Mitchell, both of whom live on the Lingard Estate and are available to the residents during the day and in the evening. Overnight emergency cover is provided by an off-site facility and a guest room is available for the use of residents’ relatives and friends.

There is a very strong community spirit at Lingard House and seven regular social events are held each week plus an exercise session (Use It Or Lose It!) and also IT training for those who wish to avail themselves of these additional facilities.

Special social events are also arranged on a regular basis and residents celebrated the coronation of King Charles III in fine style.

The immaculate grounds at Lingard House are testament to the ongoing dedication and commitment of our gardener Mick Hill, who continues to provide an amazing display at our entrance and throughout the estate.

Supporting older people in Sutton Coldfield

During the year, the second phase of the refurbishment of all kitchens and bathrooms was completed by Logmoor Limited with residents having the opportunity to choose their preferred colour schemes, further demonstrating the trustees’ commitment to maintaining their housing stock to a high standard and providing the optimum level of comfort, insulation and energy efficiency.

Information about how to apply for an almshouse can be found on the trust’s website, www.suttoncoldfieldcharitabletrust.com

Dr Francis Murray was Chair of the Almshouse Committee during the year, reflecting his ongoing interest in the provision of almshouses and his support for older people in the community.



During 2022/2023 the following trustees were members of the almshouse committee:

Dr Francis Murray Chair
Surrinder Bains
from 1 April 2023
Cllr Diane Donaldson
Keith Dudley
Inge Kettner

Jayne Luckett
Amarjit Singh
until 25 Oct 2022
Stuart Roberts
from 12 Sept 2023



01 SCCT Town Junior School

02 Sutton Coldfield Community Games

03 SCCT Sutton Coldfield United Reformed Church

04 Eco Grow CIC

05 Sutton Coldfield Heritage Network - Fospa walk in Sutton Park

06 Sutton Coldfield Community Games

07 Successful Ageing - Women, Health and Hormones

08 The Working Together Event to launch the 5-year plan

How the trust is governed

Trustees may serve a maximum of three terms following which at least **12 months** must expire before reappointment.

The Board comprises 12 (minimum) to 16 (maximum) trustees in total, made up of **8 to 12 co-opted trustees**, who are appointed for terms of five years, and 4 nominated trustees, who are put forward by Birmingham City Council and Royal Sutton Coldfield Town Council for terms of four years.

The Board of Trustees

The Board seeks trustees who diversify and balance the breadth of qualities, background, skills and experience required for delivering the trust’s charitable and strategic objectives. That expertise has included medicine, law, property, industry, faith, education, engineering, human resources, science, sheltered housing, town planning, marketing, accountancy and local government. During the year five new trustees have joined the trust bringing with them experience and knowledge which will strengthen and enhance the Board.

An induction process helps trustees to understand their responsibilities and the work of the trust. Trustees have a two-yearly review with the Chair; new trustees have an additional review in their first year.

The Board of Trustees is responsible for all of the trust’s activities and meets quarterly to receive reports, make decisions, and determine strategy.

A strategy day is held at least every two years, supplemented by regular reports on progress against agreed actions. The Board identifies and manages any risks to ensure the efficient and safe undertaking of its responsibilities.

The Board oversees the financial health of the trust, ensuring that management of its investments and accounts are robust, that effective controls are in place and that sufficient resources are available to meet the demands of the Almshouse and grant-making programmes as the two core purposes of the trust.



Committees

Every trustee is a member of one or more of the following committees:

- Almshouse committee
- Grants committee
- Finance committee
- Property committee

In addition the trust has sub-committees for remuneration and risk management.

Whilst each committee has an approved membership, all trustees may attend any committee, with access to agendas and papers through an on-line trustee portal. Advisors join committees to provide specialist guidance. Working groups may be set up for specific purposes.

Review of governance and compliance

Following the publication of the revised Code late in 2020 a review of the identified actions has continued to progress. This has included the introduction of annual grant impact report assessments and the requirement for community grant applicants to demonstrate how they would incorporate the principles of EDI in their proposed project.

The Board of Trustees has reviewed and updated the terms of reference for each committee and a schedule of policy reviews is on-going. Trustees are periodically invited to complete a feedback survey after board meetings to consider its effectiveness and areas for improvement.



01 Almshouse garden

02 Lingard House

The future

Strategic and governance reviews have supported clarity of planning to enhance charitable benefit at a time of continued and increasing adversity and uncertainty.

The trust will continue to work collaboratively with local stakeholders, including the NHS and Town Council to build an ongoing understanding of changing needs in the Royal Town during a time of extensive and escalating hardship.

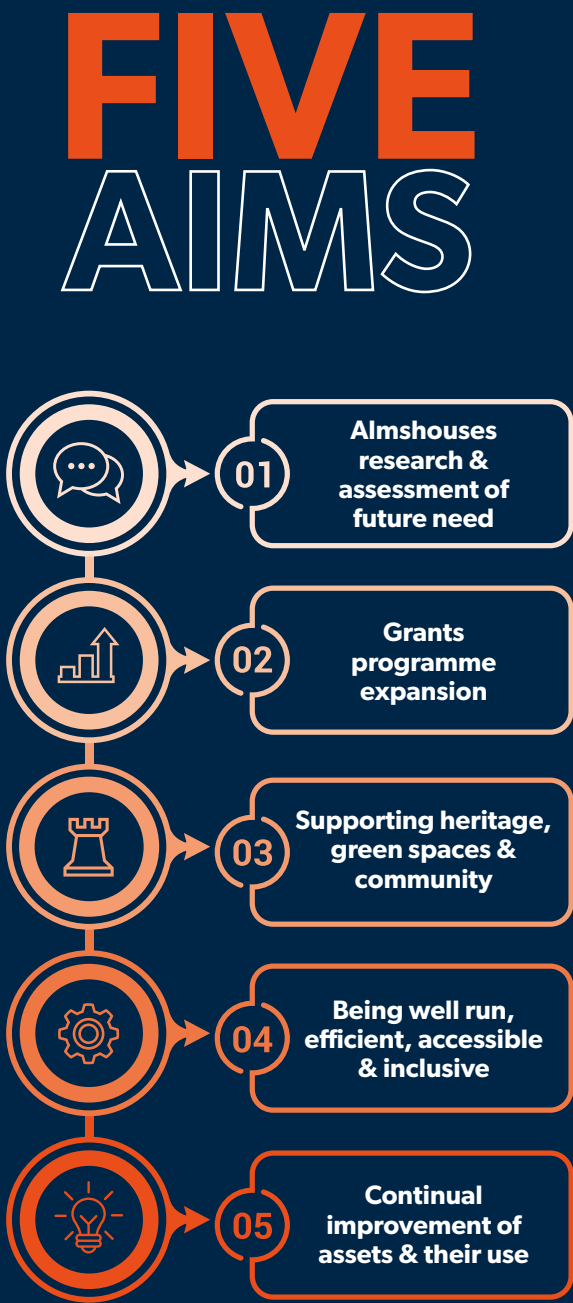
Trustees will explore how the trust may improve its environmental impact.

The SCCT five year plan sets out investment principles agreed by trustees, in preparation for anticipated financial proceeds from land sales within the Langley Sustainable Urban Extension.

A public **‘Working Together Event’** held in May 2023, launched the SCCT five year plan (Looking forward to 2028), with a vision, mission and five strategic aims to set the direction for the next five years.

This includes a review of housing needs to explore potential re-purposing of existing land and property, potentially for a more diverse range of residents.

SCCT staff and trustees are working through the five aims to form long-term delivery plans that maintain longevity of the trust and enhance its support for residents of Sutton Coldfield.



Looking forward to 2028

The SCCT five year plan sets the direction up to 2028 which is a **500 year milestone** in the history of the trust and the Royal Town.

The full plan is available on the trust’s website.

Embedded priority

Equality, diversity and inclusion will be part of the fabric of **SCCT** and all that we do

Regular theme

Learning how we may make a positive environmental contribution



Financial review

The trust ranks as one of Britain’s larger grant making charities in terms of its property, financial assets and annual income. It does not actively raise funds from the public.

Over hundreds of years, the trust accumulated land and property through bequests and enclosure awards. A considerable proportion of land has been sold over the years for building development and the trust was able to invest the proceeds by spreading its assets across a wide range of investments, including commercial property, equities and fixed interest funds. These investments are managed carefully and regularly reviewed to provide capital growth and a secure income.

Although the trust has significant holdings of property in the Royal Town of Sutton Coldfield, it has important property investments elsewhere in, for example, Kidderminster, Stourbridge, Worcester and in Herefordshire, where it owns an historic farmhouse and land. Properties and land account for 40% of the trust’s assets.

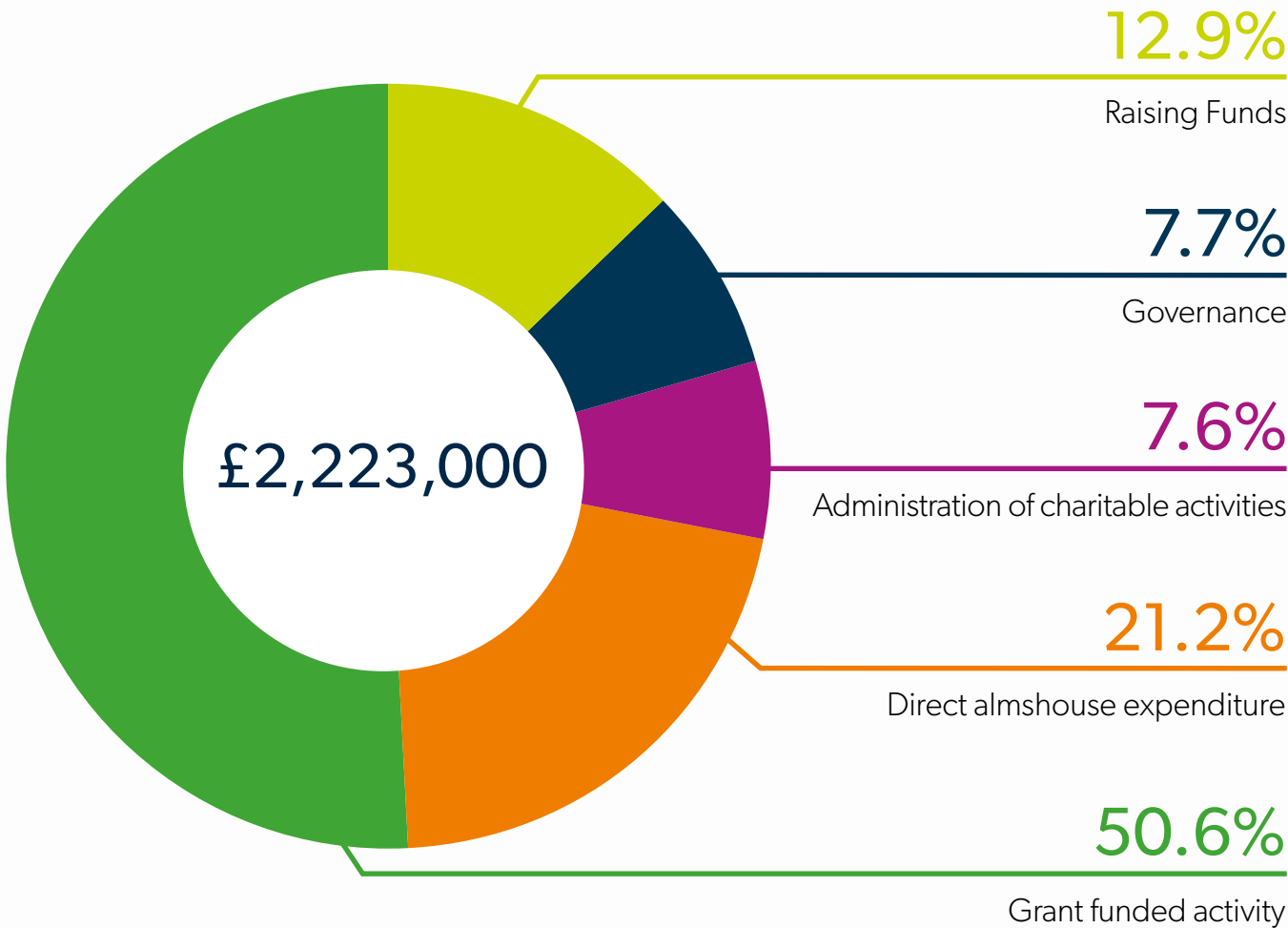
Expenditure

How the trust spends its income to 30 September 2023

Investments in property bonds, fixed interest, UK and overseas investments, accumulation shares, and alternatives account for 59% leaving 1% of the trust’s assets invested in bank deposits, awaiting reinvestment.

The Trust has an endowment fund, comprising the Walmley Almshouses (used for our charitable purposes) and capital funds which are generated income for the trust’s objectives. After an extensive review Trustees decided to adopt Total Return Accounting (TRA) from 1 October 2023, which will give us more flexibility over the endowment fund.

The Trust also holds unrestricted charitable funds which it can use as required. The Trustees undertook a detailed review of the Trust’s reserves policy in 2023 and consider that it is appropriate to hold undesignated free reserves.



Other areas which may benefit from special assistance are kept under constant review and the trust is also committed to major capital expenditure to maintain and improve the almshouses and residents’ facilities.

Committees and sub-committees

Finance committee

meets at least four times a year and has responsibility for the management of the trust’s financial assets, long-term funds and scrutiny of its operating funds, revenues and expenses.

During 2022/2023, the following trustees were members of the finance committee:

Neil Andrews Chair	Dr Francis Murray
Keith Dudley	John Routh
Inge Kettner	until 1 Jan 2023
Helen Miles	Cllr Simon Ward
from 1 April 2023	Fahmida Ismail
Andrew Morris	from 8 Nov 2023

Risk management sub-committee

reports to the Finance committee and makes recommendations on the maintenance of efficient processes for the identification and management of risk.

During 2022/2023, the following trustees were members of the risk management sub-committee:

Neil Andrews Chair	Keith Dudley
Andrew Burley	Inge Kettner

Property committee

also meets at least four times a year. The committee receives reports on property issues and is able to make decisions on behalf of the board of trustees, although the most significant matters (e.g. major sales or purchases) are always placed before the board for consideration.

During 2022/2023, the following trustees were members of the property committee:

Andrew Burley Chair	Inge Kettner
Neil Andrews	Dr Stephen Martin
Cllr Diane Donaldson	until 30 April 2023
Keith Dudley	Andrew Morris
Fahmida Ismail	Amarjit Singh
from 1 April 2023	until 25 Oct 2022

Remuneration sub-committee

also reports to the finance committee and meets at least once a year to consider all matters concerning the remuneration of the trust’s staff.

During 2022/2023, the following trustees were members of the remuneration sub-committee:

Neil Andrews Chair	Helen Miles
Keith Dudley	from 9 August 2023
Inge Kettner	Andrew Morris
	Dr Stephen Martin
	until 30 April 2023

Grants committee see page 17 and Almshouse committee see page 43

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Investment Consultant

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HR Consultants

Colden Human Resources

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Gary Phelps Communications

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Sutton Coldfield B73 5JZ

Statement of financial activities

	Unrestricted Funds 2023 £000s	Endowment Fund 2023 £000s	Total Funds 2023 £000s	Total Funds 2022
For the year ended 30 September 2023				
Income from Investments:				
Income from Charitable Activities	235	–	235	216
Income from investments	1,987	–	1,987	2,128
Total Income	2,222	–	2,222	2,344
Expenditure				
Expenditure on raising funds:				
Investment property expenses	152	–	152	234
Investment management costs	39	133	172	171
Expenditure on charitable activities:				
Cost of running Almshouses	581	79	660	406
Grant funding for:				
Community purposes	1,105	–	1,105	979
Individual educational and personal	39	–	39	28
School clothing	95	–	95	98
Total Expenditure	2,011	212	2,223	1,916

Statement of financial activities

	Unrestricted Funds 2023 £000s	Endowment Fund 2023 £000s	Total Funds 2023 £000s	Total Funds 2022 £000s
For the year ended 30 September 2023				
Net income / (expenditure) before gains or (losses) on investments	211	(212)	(1)	(489)
Gains on investment assets	86	1,025	1,111	(3,197)
Net income and net movement in funds	(297)	813	(1,110)	(2,769)
Trust fund balances brought forward at 1 October	8,367	63,714	72,081	74,850
Fund balances carried forward at 30 September	8,664	64,527	73,191	72,081

The incoming resources, resources expended and resulting net movement in funds arise from the trust’s continuing operations.

The trust has no recognised gains or losses other than the net movement in funds for the year or preceding year.



The summary financial statements on pages 54, 55 & 56 are a summary of information extracted from the audited trustees’ report and financial statements for the year ended 30 September 2023. The full set of financial statements and external auditor’s report are available at www.suttoncoldfieldcharitabletrust.com

Balance sheet

30 September 2023

	2023 £000s	£000s	2022 £000s	£000s
Fixed assets:				
Tangible assets	1,442		1,046	
Investment properties	25,971		25,586	
Investments	37,286		36,676	
<i>Total fixed assets</i>		64,699		63,308
Debtors: <i>Amounts falling due after more than one year</i>		8,735		8,735
Current assets:				
Debtors	230		320	
Cash at bank and in hand	1,148		1,303	
<i>Total current assets</i>	1,378		1,623	
Liabilities:				
Creditors: Amounts falling due within one year	(1,527)		(1,436)	
<i>Net current assets/(liabilities)</i>		(149)		187
<i>Total assets less current liabilities</i>		73,285		72,230
Creditors: Amounts falling due after more than one year		(94)		(149)
Total net assets		73,191		72,081
The funds of the trust:				
Endowment fund:		64,527		63,714
Unrestricted funds:				
Extraordinary repair fund	1,180		640	
Environment management fund	38		42	
Charitable fund	7,446		7,685	
Total unrestricted funds		8,664		8,367
Total trust funds		73,191		72,084



01



02



03

- 01 The Deanery C of E Primary School – Launch of new play area
- 02 The Jericho Foundation 30th Birthday Celebrations
- 03 Fairfax Academy Intervention Hub



Sutton Coldfield Charitable Trust

To contact the trust, write or call us at:

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You will also find further information on our website:

www.suttoncoldfieldcharitabletrust.com

Registered Charity in England and Wales No. 218627

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