



**2023
2024**

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



Sutton Coldfield Charitable Trust

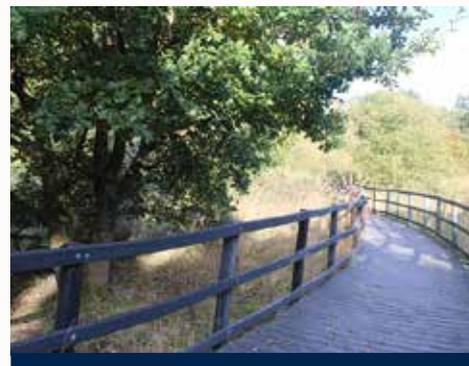
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About the trust

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

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.

1707

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.

1825

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

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.

1974

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.

2012

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 (until 6 September 2024)

Inge Kettner Vice chair (until 8 February 2024)

Dr Fran Murray Interim chair
(from 6 September 2024)

Neil Andrews (until 8 May 2024)

Surrinder Bains

Andrew Burley

CLlr Diane Donaldson*

Fahmida Ismail

Jayne Luckett

Rita Martin

Brian Maynard (from 1 April 2024)

Nigel Meredith (from 8 May 2024)

Helen Miles

Andrew Morris

CLlr Jane Mosson*

CLlr David Pears*

Stuart Roberts

CLlr Simon Ward**

*Trustees nominated by Birmingham City Council

**Trustee nominated by Royal Sutton Coldfield Town Council

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
(until 31 December 2024)

Pam Johnston MBE JP Almshouse manager
(until 30 June 2024)

Claire Evans ACA Finance director
(from 1 February 2024)

Claire Arrowsmith FCCA Property manager
(from 1 July 2024)

Robert Semple ACMA Finance director
(until 29 February 2024)

Clare Haines Grants manager

Helen Kimmet LLB (Hons) Administration manager

Donna Gibson Administrator

Jo Williams Community grants officer
(from 8 November 2023)

Almshouses

Emma Baxter Almshouse manager
(from 9 September 2024)

Marie Murphy Warden

Michael Mitchell Warden (until 31 August 2024)

Mick Hill Gardener

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



Sutton Coldfield Charitable Trust

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

We open this year's review with a tribute to **Keith Dudley**, who died on 15 October 2024 after 10 years as trustee and almost 3 years as chair. His loss is deeply felt.

This report covers the 12 months from 1 October 2023 to 30 September 2024, almost two years since the launch of the **SCCT five-year plan**.

The people at SCCT are ambassadors of our work and custodians of the trust's heritage as it progresses into the future.

We give particular thanks to **Pam Johnston, almshouse manager, who retired in June 2024 after 37 years of dedicated service**, managing the almshouses as well as overseeing distribution of school clothing grants and grant applications from individuals.

Emma Baxter was appointed in September 2024 as our new almshouse manager and has quickly initiated a number of positive changes in response to listening to residents' needs.

Our appreciation goes to **Michael Mitchell who also retired from his role as warden** in August 2024 after 4 years' excellent service supporting residents.

Claire Arrowsmith has also been appointed as the trust's property manager with effect from 1 July 2024.

Staff, trustees and residents are grateful for the ongoing support from warden, Marie Murphy and for the immaculate grounds and floral displays tended by gardener Mick Hill.



01 Fran Murray, chair

Charitable purposes

The principal objectives of the trust, as defined by the trust's scheme, is the provision of housing accommodation for the benefit of the residents of Sutton Coldfield and any surplus funds are used for charitable purposes, as decided by the trustees.

Housing is provided through 46 high quality homes at our almshouses in Walmley.

We extended our grants budget from £1.5m to £1.75m for the past year with a total spend of £1,717,268 on grant awards, in response to growing need and awareness.

I give thanks to Clare Haines, grants manager, Jo Williams, community grants officer and Claire Evans, finance director for spearheading the implementation of the new grants software system. I would also like to thank Helen Kimmet, administration manager and Donna Gibson, administrator for their role in developing the digital processes on the school grants scheme and to all staff for maintaining a supportive approach to the changes which are already transforming the way the trust operates.

Inge Kettner stepped down as vice-chair in February 2024, after 8½ years as a trustee having spearheaded many initiatives including implementation of the Total Return accounting approach.

We thank Neil Andrews and Inge Kettner for their time, effort and experience over many years.

We welcome Brian Maynard and Nigel Meredith who joined the trust in April 2024 and May 2024 respectively. They bring with them expert financial knowledge and experiences which will greatly benefit the trust going forward. We also welcome Bryan Dunn who has been appointed as a member of the Property Committee.

I thank Tina and all our staff for their hard work and achievements over this period of change, and to all trustees for their support upon my appointment as chair.

New chief executive

In December 2024, Tina Swani stepped down as chief executive having worked with staff and trustees to strengthen the governance and strategic direction of the trust as well as building a more inclusive working culture and environment. Tina has made a significant contribution in publicising the work of the trust and raising its profile in the community.

We look forward to welcoming her successor, Lisa Martinali, in early 2025.

Fran Murray

Chair





02 Lisa Martinali & Tina Swani

03 Sutton Coldfield Heritage Network – Birmingham Heritage Week

04 The team from Our Place Support Hub

Chief executive's 2023/2024 report



Review of activities and achievements

The trust formally launched its five-year plan “looking forward to 2028” in May 2023. The title of the plan 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.

EDI review

Equality, diversity and inclusion (EDI) is an embedded priority throughout the five-year plan.

In order to truly enhance the quality of life for all in Sutton Coldfield, without exclusion, staff and trustees have participated in a review of EDI, which will lead to an action plan and an accompanying EDI statement.

01 Tina Swani MBA FCIM, chief executive

SCCT five year plan

The progress towards the aims of our five-year plan are as follows:

1. Almshouses research and assessment of future need

Research, commissioned by SCCT, into housing needs in Sutton Coldfield involved interviews with community organisations. This will inform longer-term consideration about potential future housing schemes that may serve a more diverse range of beneficiaries.

A thorough review of almshouse governance was conducted to continuously improve best practice, safety and compliance.

2. Grants programme expansion

The trust's grants budget increased from £1.5m to £1.75m. The community newspaper "Royal Sutton Coldfield Charity News" was distributed in October 2024, which showcases the incredible work of charities and community organisations across the Royal Town, including those projects that are as a result of a grant award from SCCT. This has already stimulated applications from organisations we had not reached previously and promotes the diverse span of SCCT's festive and cultural grants.

Outsourcing individual grant applications to Our Place Support was a major step forward as Our Place offers access to a wide range of services.

3. Supporting heritage, green spaces and community

Conversations continue with Birmingham City Council and Royal Sutton Coldfield Town Centre about the future of our community centres. These provide vital services and places for people to meet and obtain tailored advice. Over the past 12 months we have developed a more detailed view of the importance and vast array of needs served through libraries, faith and community centres.

4. Being well run, efficient, accessible and inclusive

We have gone digital with our new grant software system and are working with grant applicants to support them in this transition. Going digital does not mean losing the human approach. Our grants staff continue to be responsive and supportive of all grant applicants particularly those who may not have experience at making applications.

5. Continual improvement of assets and their use

We advertised some of our vacant almshouse properties on social media during the year; we now have a small waiting list. In addition, we commenced a benchmarking project to compare the costs and the way we run our almshouses with other housing schemes. This has led to improvements in staffing arrangements, engagement with residents, and better use of the residents' communal facilities.

The environment

The environment is a regular theme throughout the five-year plan. Two years ago Manorial Wood was replanted with deciduous saplings. Bracken needs removing from time to time to allow the saplings to survive. In August 2024, Bronwyn & Abbey were appointed to carry this out by hand, avoiding the use of harmful chemicals and preserving biodiversity and clean air.

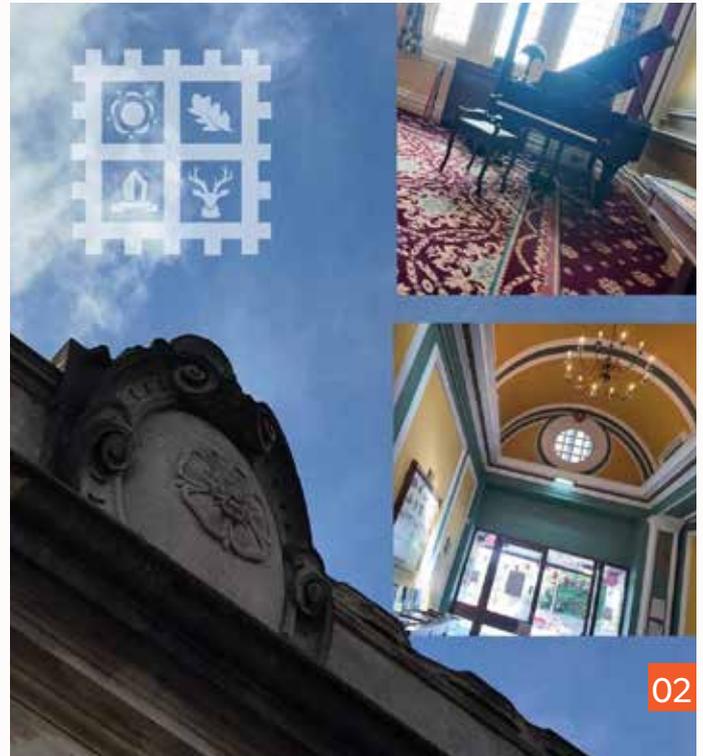
I send a personal thank you to all at SCCT and everyone I have worked with in my role as chief executive as I hand over this amazing responsibility to my successor, Lisa Martinali, supported by an exceptional team and board of trustees. It has truly been a privilege!

Tina Swani MBA FCIM

Chief executive



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02

01 The Oasis Café at Sutton Coldfield United Reformed Church

02 Sutton Coldfield Heritage Network Event

03 New Hall Country Park official boardwalk opening



How to make a grant application

In the year 2023/2024, Sutton Coldfield Charitable Trust awarded grants to organisations and individuals amounting to £1,717,268.

How to make a grant application

- Contact the trust via the website, by letter, email or telephone.
- Outline the need or issue to be addressed through securing a grant and the amount of funding being sought.
- Discuss your proposal with the trust's grants team.
- If eligible, apply for a grant via the trust's online portal.
- Ensure that all relevant documents, including accounts and quotes are received by the trust by the requested dates.
- For organisations, it is usual for a period of three years to have elapsed after receipt of a capital grant, before a further application is considered.

How grants are awarded

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

Towards the end of last year, the trust transitioned to a new digital grant management system, designed to provide a streamlined, efficient and user-friendly experience for both new applicants and existing grantees.

Applications are submitted via the trust's online portal which is accessible once applicants have been in contact with the grants team and have completed an eligibility checker. Detailed guidance is available to support applicants during the process and the grants team are on hand to answer questions and queries as they arise.

The grants committee meets regularly - at least eight times each year. Following an assessment of the application, the grants team present grant requests and applications to the trustees and answer any questions to assist the decision-making process. Trustees receive a clear written summary of the requests and extracts of accounts in advance of the meeting.

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.

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 grants team.

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. In addition, organisational applicants must be not-for-profit, with a community bank account in their name.

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 that may benefit from the trust's assistance.



During 2023/2024, the trust received **96** applications for grants and the majority received awards. School clothing grants, benefitting **906** children, were also approved.

Tribute to Keith Dudley

Chair of the board of trustees
February 2022 to September 2024

Trustee
7 May 2014 to 15 October 2024

It is with great respect and sadness that we honour the life of Keith Dudley who served as trustee of Sutton Coldfield Charitable Trust for over 10 years and as chair since February 2022 until his death on 15 October 2024.

It is barely comprehensible that Keith is no longer with us when six months beforehand he was leading the board and steering an away day, with all the vigour and enthusiasm he brought to the role.

Keith brought a rare blend of insight, creativity and sharp wisdom with his legal expertise and passion, leading the shaping of our mission in many ways. He led with compassion and purpose and was always there for guidance and support, whilst equally prepared to challenge where needed with a matter-of-fact clarity and calm strength.

Keith served on all the committees of the trust, being particularly passionate about our grants programme and steering us through increasingly challenging decisions.

As time goes forward there will be many instances when we recognise the legacy that Keith has left the trust, through the initiatives he was determined trustees should consider and see through, such as the organisational form of the trust, testing out production of a community newspaper, and being sure that we were really reaching everyone who could benefit from the trust's provision of housing or grant awards.

Keith went to great lengths to give his personal thanks to staff, trustees and advisors. His loss is deeply felt.

Our thoughts remain with Keith's family, and we share lasting gratitude to Keith for all that he brought to Sutton Coldfield Charitable Trust.

Fran Murray
Chair

Tina Swani
Chief executive



01

01 Keith Dudley

Grants well spent

Making sure that grants are well spent

How the trust evaluates impact and 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 older people 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.

Depending on the type of project being delivered, a formal monitoring process is in place. This helps the trust understand how funds are being spent, and enables us to measure progress and impact, understand and support groups through key challenges and provides us with a better understanding on how project objectives and outcomes have been achieved and the difference they have made.

Where necessary, interim and final monitoring reports are required during the delivery of projects, with a requirement for these to be completed before the full grant is paid. Quarterly reports providing an overview of project progress, are made available to the trustees for scrutiny.

The grants team also evaluate impact through meetings, both in-person and online, telephone discussions and visits to grant beneficiaries. It is often easier, where appropriate, if applicants clearly set out their objectives in the application. This way outcomes can be measured more consistently.



A number of monitoring methods remain in place for overseeing projects i.e. online video meetings, virtual tours and photographs that show progress and completion of projects.



02



03

- 01 Grow Family Services volunteers with SCCT trustees
- 02 Langley School Sensory Room
- 03 Cherished Staff on SCCT trustee visit

During 2023/2024 the following trustees were members of the grants committee:

Keith Dudley Chair (until 6 September 2024)

Inge Kettner Vice Chair (until 8 February 2024)

Andrew Burley Interim Chair (from 6 September 2024)

Surrinder Bains (from 8 November 2023)

Jayne Luckett

Rita Martin

Cllr Jane Mosson

Cllr David Pears

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.

Every year, the trust offers school clothing grants, in the form of vouchers, to low-income families who live in the former Borough of Sutton Coldfield and are in receipt of certain benefits.

In the year 2023/2024, Sutton Coldfield Charitable Trust awarded grants to individuals and organisations amounting to £1,717,268.

Amount awarded

£1,717,268



96
Number
of grants



Average
grant size

£17,888



16 New
organisation
beneficiaries



97%
Successful
organisation awards

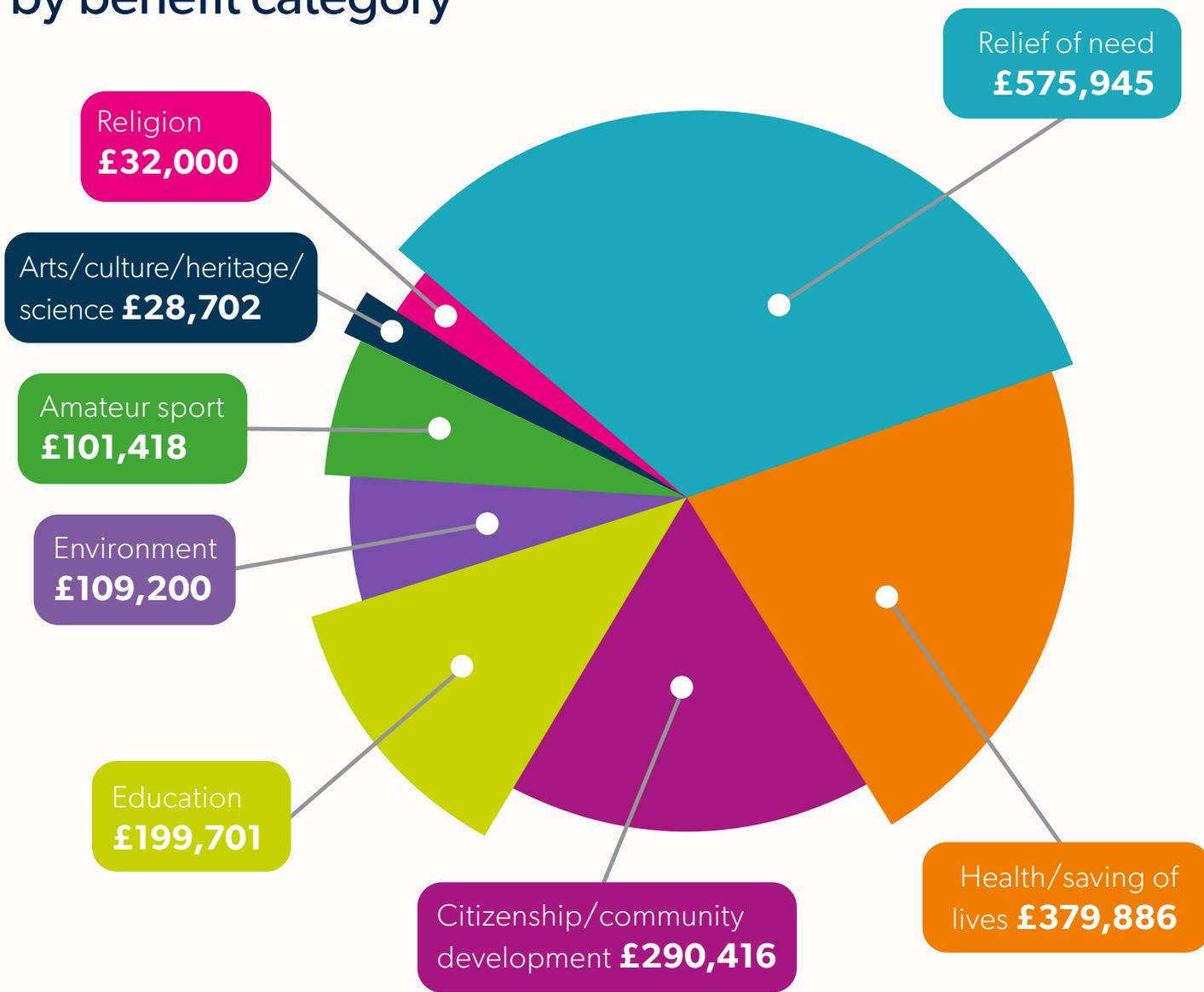
Successful
individual
awards



88%

Grants awarded

by benefit category



Case studies

Highlighting the impact of grants at a local level

The trust supports a diverse range of amateur sport clubs and initiatives that inspire people to venture into sport.

Rectory Amateur Boxing Club

For many young people, finding a healthy hobby and learning skills such as discipline and perseverance can set them on a brighter path.

As Sutton Coldfield's only boxing club, **Rectory ABC** encourages its members to channel their emotions through sports, refine their skills and gain a new passion in a safe and welcoming environment.

The club was founded in 2007 by Senior Coach **Phil Brennan**, with the aim of promoting boxing and a healthy lifestyle. The club has always had a specific focus on widening participation in the sport, which is accomplished through making their sessions as affordable as possible and creating a diverse, friendly environment for all. **Rectory ABC has seen great success in this aim, attracting hundreds of amateur boxers from all backgrounds, abilities and ages ranging from 8 to 40+.**

In 2023, Rectory ABC received a grant of **£28,500** from Sutton Coldfield Charitable Trust, to be

used towards operational costs, purchasing new equipment, and delivering a 12-month **BoxerBeat** project. The latter is one of the club's greatest success stories.

BoxerBeat is an outreach project delivered both in local schools and in Rectory ABC's own gym, which combines music and boxing to introduce people to the sport in a contact-free, rhythmic way.

Phil said: "I've used the SCCT grant to do BoxerBeat events in schools. It's a really good method of teaching boxing using rhythm to break down the skill – we even did a film for the Commonwealth Games. Some people who have come in for BoxerBeat are now regular members of the club."

Additionally, the **BoxerBeat project is in keeping with one of Rectory ABC's key values** – that members will not be forced to engage in contact sport until they want to and have the skills to do so. Being entirely non-contact, it introduces people to boxing in a fun, non-combative manner, which Phil said is essential to dispelling



negative stereotype myths. The volunteer-led club adheres strictly to national ABC Safeguarding Policies.

Phil said: "People may be scared of boxing, it has a reputation for being violent. **We want to emphasise that amateur boxing and boxing as a sport are safe, disciplined forms of exercise, often with zero contact. It changes**

lives for the better. Basically, nobody has to get hit if they don't want to! Combat isn't obligatory, you can just come and learn the moves and use the gym."

It is this welcoming environment and structured exercise which has made Rectory ABC so successful in rehabilitating young people deemed "likely to be attracted to low level crime" by local Police. One long-term member is a testament to the club's success.

Ryan Staurvik joined the club at the age of 9, following a summer outreach scheme run by Rectory ABC in Falcon Lodge. Now age 26, Ryan has gained his boxing license and is training to be a coach.

Ryan said: "I'm so glad I came along to the club. I think it potentially kept me out of getting into trouble as a young lad and gave me really good discipline. It's a family gym, everyone bounces off each other and we pick each other up. I've learned so many life skills here."

A more recent member, 12-year-old Fairfax student Charlie Carrolan, also exemplifies the club's ability to help young people channel their emotions in a healthy way.

Charlie said: "I've been coming here six months now, and I come any chance I can – I'm here all the time. I always wanted to box as a little kid, but I was too young. The club gave me that opportunity."

"I was always a physical kid, so as soon as I started boxing it taught me discipline. Boxing is home for me, and next season I'm looking to compete when I'm ready."

According to Phil, the transferable life skills young people get from boxing are plentiful, with many of the club's members going on to **succeed more academically and socially** because of the self-control and confidence they learn whilst boxing.



01 Club regulars Ryan (member since 2008) and Charlie (member since 2024)

Phil said: “Kids learn discipline, so they become more attentive and well-behaved in school. Their diet may improve too. There are lots of knock-on effects into their regular life, when they dedicate themselves to boxing.”

“Some kids come to the club who have been bullied, and who lack self-confidence. **Boxing can give them the confidence to know they are strong and worthy.** Self-defence is also a life skill – we don’t encourage people to start fights, but it’s essential to know how to defend yourself.”

However, the club’s focus on improving people’s mental health and providing them a safe outlet for their emotions extends beyond at-risk youth. Phil explained: “We’ve done schemes with the local Fire Brigade, and for people with PTSD, anger issues, anxiety and depression, teaching them non-contact boxing to promote confidence. We’ve had a great response.”

Rectory ABC’s contribution to the community has been recognised with several awards, having won acclaim at regional and national competitions, and having been awarded Sutton Coldfield Sports Award ‘Club of the Year’ in 2016.

Now, in part thanks to the SCCT grant, Rectory ABC has seen even greater success, with improved equipment and outreach programmes attracting more members. The club now has over

120 registered members of different ages and skill levels, with an average of 60-80 people using their facilities weekly.

Phil said: “The funding has helped us purchase equipment and put on shows. It’s been massive – we’re now a really well-equipped club, and that’s down to the trust. This is important because as part of our widening participation goal, we want people from all backgrounds to have access to the highest quality equipment.”

“The grant has also meant I don’t have to spend all our other funding on equipment, and I can focus on arranging things to engage with the community. It’s been really successful.”

Impact of funding:

Grant awarded: £28,500

Number of registered members: 120

Number of weekly visitors: 60-80

Project outcomes:

- Improved mental health of participants.
- Rehabilitation potential and improved discipline.
- Transferable life skills.
- Improved club equipment and an increase in members.

The Friends of New Hall Valley Country Park Association

Sutton Coldfield is fortunate in the expanse of open spaces, allotments and nature reserves within its boundaries. The trust is proud to support an array of projects that work towards the advancement and improvement of environmental protection. The Friends of New Hall Valley have made a huge difference to one of Sutton Coldfield's much-loved green spaces.

Established in the 1990s, **New Hall Valley Country Park (NHVCP) covers 198 acres of green belt land**, with a number of diverse habitats and areas of historical significance. The park has become not only a beloved spot for leisure and exercise but is also an important 'green corridor' connecting areas in Sutton Coldfield and Walmley.

In 2022, the Friends of New Hall Valley Country Park Association was re-founded after a period of absence, to enable local people to get involved with the **maintenance and development** of the



park. Through Sutton Park Rangers, the Friends liaise with Birmingham City Council, who manage the park.

Key to the Friends success are the established working parties in New Hall Valley, contributing to its regular maintenance. These have included conducting wildlife surveys, clearing pathways, repairing fences and managing invasive Himalayan balsam.

Their sessions are well-attended, with between 10 and 20 volunteers in a typical working party. Volunteers represent a diverse array of communities, cultural groups, ages and abilities. The Friends also use social media and email to communicate with interested locals. As of August 2024, their Facebook group has over **840** members, and more than **150** people are signed up to receive their email updates.

This year saw perhaps their biggest project. **A grant of £26,000 from Sutton Coldfield Charitable Trust** was used in combination with funding from Birmingham City Council and Royal Sutton Coldfield Town Council to replace the boardwalk at NHVCP, which has been deteriorating for some time due to natural erosion and vandalism. It was targeted by arsonists twice, first in 2012 and again in 2019, with the Friends repairing it on both occasions.

01 Members and volunteers of The Friends of New Hall Valley

Mark Sargent, Chair of the Friends of NHVCP, said: "After the attack in 2012, the then Chair Jeff Gilbert came up with the plan to let people sponsor a board on the replacement boardwalk. It was nice for our sponsors to be celebrated by having their names carved into the boards, but the carvings sadly allowed water to collect, rotting the boards and reducing their lifespans."

"After the second fire in 2019, the boardwalk was replaced with timber scaffold boards, which were cheap and quick to install. The timber has since decayed, and it gets very slimy in winter. It got to the stage where the boards were snapping, and people were slipping. We feared Birmingham City Council would close the boardwalk entirely over safety concerns, which would be devastating to the people who rely on it as a travel route."

With the boardwalk's longevity and safety in mind, the Friends were eager to replace the rotten timber with recycled plastic boards, which would last more than 40 years, and which would not leach dangerous chemicals into the surrounding wetland habitat.

Thanks to the grants from **SCCT, Birmingham City Council and Royal Sutton Coldfield Town Council**, they were able to realise this vision.



The Friends worked in collaboration with several organisations to complete the restoration project.

The bolts for the project were provided by Kebrell Nuts & Bolts Ltd and volunteers sent by Murphy Construction saw them move 16 tonnes of material needed for the project. Drug rehab charity **Betel UK** sent volunteers to help assemble the basic structure of the boardwalk, who Mark says were instrumental to the project's success.

He said: "NHVCP is such a valued local asset. Dozens of people were drawn to help us repair the boardwalk, so there was a real sense of community to it. The team from Betel UK were very enthusiastic and did a great job – there was even some friendly competition to make things fun!"

Steve Naylor of **Betel UK** said: “Our team from Betel were here from day one. It took us 17 days to put the initial frame in, and because we were working in a swamp in the rain, it was very challenging. **It’s absolutely amazing now. It’s been so worthwhile, and we’re really grateful we were able to contribute.**”

The recycled plastic boards were sourced from Hahn Plastics, with whom the Friends liaised through Kacey Recycled Plastics. The material used is made entirely out of post-industrial and post-consumer waste, is non-toxic, and is resistant to rotting and splintering. This has made the finished boardwalk durable and accessible to all pedestrians, including those using wheelchairs, pushchairs and mobility aids.

The restored boardwalk also gives space to local wildlife, as it is suspended above a thriving wetland habitat. Historical architecture and natural habitats alike are protected by the boardwalk, which has multiple viewing platforms to enable

The boardwalk was officially opened on Wednesday, August 14 2024 by both the Royal Town’s Mayor, John Perks and Birmingham’s Lord Mayor Ken Wood.

passers-by to connect with nature and history from a safe distance.

Mark said: “**This wouldn’t have happened without SCCT’s funding** – without them we would have had to use timber. The grant enabled us to make repairs in the right material for the location and longevity. People constantly use it, and you can see their gratitude for it.”

“**Last but not least I’d like to thank the volunteers, who come along week-in, week-out** – without them, this project wouldn’t have reached completion.”

Impact of funding:

Grants awarded: £26,000

Number of volunteers per session: 10-20

Project outcomes:

- Renovation of a 185-metre-long boardwalk.
- A safe and sustainable access provided for the wetland habitat of New Hall Valley.
- Achieving sustainable and resistance solutions using recycled materials.
- Providing protection to natural habitats and local wildlife.

Grants awarded

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

Grants totalling **£575,945** were provided for the relief of those in need across 34 organisations and seven individuals.

In addition, school clothing grants reached record levels again this year with **£90,600** providing support to **906 children** through **511** successful family applications.

Demand for personal grants continued, with seven grants between **£250** and **£3,000** awarded to individuals and families for items as diverse as the provision of essential domestic equipment, home repairs and educational support.

In addition, a grant of **£11,000** was awarded to Our Place Support to manage and distribute further grants to individuals in need, on behalf of the trust.

Relief of those in need

For several years the trust has been a key partner for the Jericho Foundation, supporting their work to address youth unemployment in Sutton Coldfield via a supported apprenticeship programme.

Jericho helps apprentices to gain a real job, in a real business, plus a recognised qualification that acts as a stepping stone to sustainable employment, in addition to personal development, mentoring and training.

In February 2024, the trust awarded a grant to support the expansion of the existing apprenticeship scheme, with a tailored offer for a broader range of individuals. In addition to the apprenticeship programme, this included part-time work placements, term-time



placements for eligible secondary school pupils and a volunteer work placement to support back to work transition. Since the award, Jericho has received a large number of enquiries and applications for the scheme, demonstrating need and demand for individual support and work opportunities.

Supporting services like this is vital to achieving the trust's vision to enhance the quality of life for all in Sutton Coldfield.



01 & 02 Jericho Wood Shack and ReUsers

Festive celebrations

For many years, the trust has supported local residents and organisations with a contribution towards their festive and cultural celebrations.

During the last 12 months, grants totalling **£19,548** were awarded to **27 groups**, benefitting over **1,000 individuals**.

The trust's festive and cultural celebration grants are there to help Sutton Coldfield residents mark a diverse range of festive celebrations and holy days, including Eid, Diwali, Vaisakhi, Christmas, Chinese New Year, Passover and many more.



Relief of those in need

£375,000	Jericho Foundation – Sutton Works	Towards employability focused support and pathways for Sutton Coldfield residents
£90,600	School Clothing Scheme 2024	SCCT School Clothing Scheme awards supporting 906 children
£39,765	Hope Food North Birmingham	Towards supporting food bank provision in Sutton Coldfield for 12-months
£16,000	Grow Family Services	Towards the expansion and delivery of Grow Family Services
£13,465	FoodCycle	Community Dining Project in Falcon Lodge
£11,000	Our Place Support – Personal Grants	To assess, manage and monitor SCCT personal grants as a pilot project over a six month period
£6,567	Personal Grants	Grants to 7 Individuals
£4,000	Walmley Golf Foundation CIC	Towards the purchase of a ParaGolfer to support disability inclusion
£1,700	Hellaby House Residents Association	Festive celebrations
£1,500	Jacobs Well Coffee House	Festive celebrations
£1,264	Sutton Coldfield Stroke Club	Festive celebrations
£1,100	Lingard House Residents	Festive celebrations
£1,060	Hargreaves Close Residents Social Group	Festive celebrations
£1,050	NS (RAF) Association	Festive celebrations
£1,000	St Chads Sunshine Café	Festive celebrations
£1,000	Homehall House Residents	Festive celebrations
£900	Falcon Lodge Chapel 3GF	Festive celebrations
£880	Calder Drive Social Group	Festive celebrations

£700	Copenhagen Mews Social Club	Festive celebrations
£700	Boldmere Methodist Church – The Smilers Club	Festive celebrations
£680	Glovers Trust Almshouses	Festive celebrations
£650	Pakenham House Social Club	Festive celebrations
£600	Tanner’s Close Residents, Lench’s Trust	Festive celebrations
£500	Park Court Residents Association	Festive celebrations
£500	FOLIO Sutton Coldfield Elderberries	Festive celebrations
£500	Sutton Coldfield Widowed Group	Festive celebrations
£494	Tudor Court Residents	Festive celebrations
£440	Owen Court	Festive celebrations
£400	Riland Court Social Group	Festive celebrations
£400	Goldieslie Close Residents	Festive celebrations
£360	Dovecotes Retirement Housing	Festive celebrations
£350	Ley Hill Tea Club	Festive celebrations
£320	Elisabeth Court	Festive celebrations
£260	Sons of Rest	Festive celebrations
£240	Birmingham Ileostomy Association	Festive celebrations

£575,945 Relief of those in need

The advancement of education

Let's learn

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

The trust has an established scheme to support the advancement of education in Sutton Coldfield schools. The School Grants Scheme operates on a three-year cycle and ensures that eligible schools can apply within a specific 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, **£173,101** was awarded to support projects at two secondary schools and six primary schools. As a result, **4,808** pupils benefited from the funding made available to support extra-curriculum activities, IT upgrades and improved teaching spaces.

Walmley Infant School was awarded a grant to purchase new outdoor learning equipment for their Early Years Foundation Stage.

In addition, a grant of **£11,500** was awarded to **Langley Primary School** towards the refurbishment of two sensory rooms.

The trust also supported **Sutton Coldfield Libraries with a grant of £15,100** to deliver the 2024 summer reading challenge. This is a national scheme aimed at primary school children, focused on supporting children to develop a love of reading.



01

01 Walmley Infant School – Outdoor learning equipment

02 Sutton Coldfield Libraries – Craft Clay Modelling



£34,400	Bishop Vesey's Grammar School	Towards the development of a computer science expansion project
£33,222	New Oscott Primary School	Towards 32 pupil laptops, 2 laptop trolleys, 32 pupil iPads, 32 iPad cases, and 2 iPad trolleys
£25,428	Bishop Walsh Catholic School	Towards purchasing new visualisers as teaching aids across the school's 52 classrooms
£20,776	Little Sutton Primary School	Towards 33 desktops and a 65" interactive touchscreen
£20,531	Wylde Green Primary School	Towards iPads, iPad covers, and a charging trolley
£15,486	Sutton Park Primary School	Towards purchasing tents and outdoor camping equipment
£15,100	Sutton Coldfield Libraries	Towards the 2024 Summer Reading Challenge across Sutton Coldfield Libraries
£13,320	Walmley Infant School	Towards EYFS outdoor learning equipment
£11,500	Langley Primary School	Towards the refurbishment of two sensory rooms
£9,938	St Nicholas Catholic Primary School	Towards new iPads, a charging trolley and creating new storage space for PE equipment

£199,701 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 **£28,702** was awarded to projects focusing on the advancement of arts.

New Hall Mill is the only surviving water mill out of the thirteen that originally existed in Sutton Coldfield.



The Friends of New Hall Mill received a grant of **£10,320** to restore a historic barge wagon located at the Mill, along with educational interpretation boards, and lighting for the cart shed.

The restored wagon will provide a tactile, interactive exhibit and will enable the wagon to be moved to a central position in the Mill Yard, facilitating improved access and a focal point to the Mill on Open Days.

- 01 Image of the wagon prior to restoration
- 02 Sutton Coldfield Heritage Network Heritage Week events

Birmingham Heritage Week has taken place every September for many years tying in with national **Heritage Open Days** which have been operating for **over 25 years**.

Sutton Coldfield Heritage Network received a grant of **£8,382** to deliver a programme of events and activities to support **Birmingham Heritage Week 2024**.

The Sutton Coldfield based programme of events included walks, talks, tours, open days and a performing arts concert to bring the celebrations to a close.



£10,320	The Friends of New Hall Mill	Towards the restoration of a barge wagon, educational interpretation boards, and lighting for the cart shed
£10,000	Sutton Coldfield Choral Society	Towards the production of 4 choral concerts
£8,382	Sutton Coldfield Heritage Network 2024	To deliver a programme of events and activities to support Birmingham Heritage Week 2024

£28,702 Advancement of arts, culture, heritage or science

The advancement of religion

St John's Church, Walmley received a grant of £32,000 to carry out roof repairs, focusing on replacing the coping stones on the gable end of the Victorian building.

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 trust.

This work was deemed essential and ensured the immediate safety of church users when outside, in addition to maintaining the integrity of the building and enabling the church to continue with their community work and engagement.



- 01 St John's Church, Walmley – outside view
- 02 St John's Church, Walmley – roof repaired
- 03 St. James Church, Mere Green

This year saw the development of works carried out at St. James Church, Mere Green following a grant of £44,000 to carry out improvements to accessibility and community facilities.

The grant, awarded from the trust's previous year's financial budget, has been used to re-order internal parts of the church to make the building fit for future generations. The vision was to extend and diversify the use of the church building so that it provides a space for a wide section of the community and to increase capacity for groups to meet and socialise.

The development of community facilities and improved accessibility included the installation of a disabled toilet, a ramp at the main entrance of the church and development of a community café area to name a few.



£32,000 St John's Church Walmley

Towards roof repairs

£32,000 Advancement of religion

The advancement of environmental protection or improvement

To increase their capacity to deliver specialist palliative and end of life care services, **St Giles Hospice** applied for funding to improve environmental conditions, reduce their energy costs and carbon footprint at their premises on Lindridge Road.

A grant of **£78,000** was awarded towards environmental improvements, including the installation of solar panels, upgrading lighting and the installation of electric gates.



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

The **Friends of New Hall Valley Country Park Association** received a grant of **£26,000** to renovate a 185-meter-long boardwalk at the country park.

The work was carried out by a group of dedicated volunteers, made up of a diverse array of communities, cultural groups, ages and abilities. The project used recycled and resistant materials to provide safe and sustainable access to the wetland habitat and protection to local wildlife.





- 01 St Giles Hospice - solar panels
- 02 New Hall Valley Country Park - The new boardwalk
- 03 New Hall Valley Country Park - Trustees visit to see the boardwalk

£78,000	St Giles Hospice – environment	Towards environmental improvements at the St Giles Sutton Coldfield site
£26,200	Friends of New Hall Valley Country Park Association	Towards replacing and renovating sections of the boardwalk at New Hall Valley Country Park
£5,000	Boulevard Allotment Association	Towards resurfacing the allotment car park

£109,200 Advancement or improvement of environmental protection

The advancement of **health** or the **saving of lives**

Acorns Children's Hospice Charitable Trust provides specialist palliative care to babies, children and young people from the West Midlands.



01

Grants totalling £379,886 were made to 13 organisations which provide invaluable health support to the residents of Sutton Coldfield.

In 2023 there were **16 children** from Sutton Coldfield (aged 0-18) who received direct palliative care from Acorns, in addition to **39 family members** who received care and support.

The trust awarded a grant of **£54,541** towards **56 days of palliative care** for life-limited and life-threatened babies, children and teenagers from Sutton Coldfield.

Every stay at Acorns is bespoke to each child, with access to an art room, communal dining area, visits to the pets-as-therapy pups and the opportunity to book family splash sessions.

There is also access to the family team service who are on call to support family members.

01 Acorns Children's Hospice

02 Acacia Family Support

Acacia Family Support provides community-based, volunteer-led support services to mothers and families affected by pre/postnatal depression and anxiety.

Their base in Walmley provides a host of services, including a free creche, one-to-one listening and

support, cognitive behavioural therapy group work, practical support in the home, and signposting to other services, to name a few.

Trustees awarded a grant of **£60,000** towards the running costs of Acacia's Walmley centre, salary costs and rent for their office in Sutton Coldfield town centre.





01

The Cancer Support Centre offers support for individuals impacted by cancer, with programmes tailored to individual needs and choices, providing complementary support alongside medical treatments.

Last year a grant of **£24,750** was awarded to support their annual rent costs for a 12-month period. The project aims to facilitate the allocation of internal resources towards fundraising efforts and to build on financial reserves, thereby expanding their capacity to aid individuals and families affected by cancer.

£60,000	Acacia Family Support	Towards rent, salary and running costs of Acacia's Walmley Centre
£57,000	St Giles Hospice – Reconfiguration	Towards enhancing, reconfiguring and refurbishing the St Giles Sutton Coldfield site
£54,541	Acorns Children's Hospice	Towards palliative care for life-limited and life-threatened babies, children and teenagers from Sutton Coldfield
£48,188	Square Peg Activities Ltd	Towards salary costs
£39,225	Love Life Again CIC	Towards grief counselling sessions to families in need
£25,000	Birmingham Hospice	Towards refurbishment of the Inpatient Unit at the Birmingham Hospice, Erdington site
£24,750	Cancer Support Centre	Towards rent at Lindridge Road, for a 12-month period
£19,500	Wylde Green Rotary Club	Towards cardiac screening for people aged 14-35 in Sutton Coldfield over a three-year period
£16,800	Dance4U Inclusive Arts CIC	Online dance lessons for disabled young people, admin & monitoring
£15,000	Heart Care Sutton Coldfield	Towards the running costs of Heart Care Sutton Coldfield for a 12-month period
£14,883	Advocacy Matters	Towards delivery of a Befriending Matters project in Sutton Coldfield care homes
£4,000	UK Sepsis Trust	Towards Sutton Park Sepsis Savvy awareness walk
£999	St Chads Sunshine Café	Towards the hire costs of the Virtual Dementia Tour Bus

£379,886 Advancement of health or the saving of lives

The advancement of **citizenship** or **Community development**

The trust awarded a grant of **£38,340** to **Birmingham Community Matters** to provide capacity support for voluntary community groups in Sutton Coldfield.

Recognising how important it is to support local community groups, the grant enables **bespoke support and advice** to be delivered to those organisations delivering services for the benefit of residents in Sutton Coldfield.

This provision is delivered in the form of in-person and on-line, themed based learning sessions, 'meet the funder' events and one-to-one drop in sessions for those that require more in-depth support.



01

01 Birmingham Community Matters

02 Food4u food bank

Sutton Coldfield United Reformed Church secured a grant of **£45,245** to support the salary costs of the community hub manager who oversees the day to day running of the community hub at the church. The church hub provides an **important community service for many residents**, reaching out to the local community through the Café Oasis Community Cafe, Food4U foodbank, the parish nurse service, messy church and via the 20 local

groups and organisations that hold activities and meetings on the premises.

In addition to the foodbank and parish nurse, examples of the services supported include: occupational therapy drop-in, diabetes support, carers support, benefits advice and guidance, energy advice, chair-based exercises, indoor bowls, badminton, curling and many others.





01



02

01 Square Peg Activities

02 Birmingham Community Matters

03 Sutton Coldfield Muslim Association & Mosque



03

£45,245	Sutton Coldfield United Reformed Church – Community Hub	To support the salary costs of the community hub manager for a 12-month period
£42,544	Our Place Support Mentoring 2024-25	Towards 54 match-funded and 6 fully funded places for school mentoring service 2024-2025
£38,340	Birmingham Community Matters	Towards providing increased capacity support to voluntary community groups in Sutton Coldfield
£35,485	Wylde Green United Reformed Church	Towards 2 years funding towards a qualified youth worker
£30,000	Boldmere Futures CIC	Towards supporting the Boldmere Summer Festival
£27,000	Successful Ageing CIC	Towards 2 years operational costs of the Successful Ageing Project
£26,760	PCC Emmanuel Wylde Green	Towards the insulation and refelting of the church hall roof
£26,000	Sutton Coldfield East District Scout Council	Towards employing a part time local growth officer
£5,286	Sutton Coldfield U3A	To support Sutton Coldfield U3A group activities
£5,222	Successful Ageing Gap Funding	Towards gap funding to provide interim support to the group
£4,692	Four Oaks Ladies Friendship Club	To support group activity costs of the Four Oaks Ladies Friendship Group for 12 months
£999	Elisabeth Court	Towards sporting activities and equipment, a fitness instructor, garden improvements, and catering
£987	The Dovecotes	Towards the enhancement of the courtyard garden and entrance
£700	Sutton Coldfield Fuschia Society & Gardening Guild	Towards 18 new trestle tables to be used for practical growing sessions and shows
£656	45th Sutton Coldfield St Columba Brownie Pack	To purchase resources and badges for the brownie pack
£500	NS (RAF) Association – Sutton Coldfield	Towards an event to commemorate the 80th anniversary of the D-Day landings

£290,416 Advancement of citizenship or community development

The advancement of amateur sport

A total of £101,418 was awarded to amateur sports projects over the last 12 months.

Sutton Coldfield Rifle and Pistol Club is a not-for-profit community amateur sports club, located at Sutton Coldfield Football Ground on Coles Lane.

The club is run by a team of volunteers and focuses on target-shooting for leisure and competition at various distances up to 25 yards. With over **100 members**, the club is affiliated to



01 Trustee visit at Sutton Coldfield Rifle & Pistol Club

02 Sutton Coldfield Taekwondo – breaking frames

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

the National Small-Bore Rifle Association (NSRA) and is an accredited British Shooting Disability Club Hub.

A grant of **£10,000** has enabled the club to replace their heating system, improve ventilation and enhance disabled access.



02

Established in 2014, **Sutton Coldfield Taekwondo** is a not-for-profit sports club affiliated to the Global Taekwondo UK. The club is run by a team of volunteers and has **97 active members** aged between 5 – 70 years old.

The club received a grant of **£8,511** towards rental costs, equipment and materials, training, and marketing for 12 months.

The funding enabled the club to continue to train and support current members, in addition to publicising for new members.

£30,000	Goldieslie Club	Towards the refurbishment and reconfiguration of the Goldieslie Club Clubhouse
£18,500	Rectory Amateur Boxing Club	Towards equipment and delivery of the Boxer Beat project
£13,500	Boldmere Sports & Social Bowls Club	Towards replacement of the bowling club mower
£10,000	Rectory Amateur Boxing Club (Operational)	Towards operational costs for one year
£10,000	Sutton Coldfield Rifle & Pistol Club	Towards a new heating system, ventilation and disabled access including a toilet
£8,511	Sutton Coldfield Taekwondo	Towards 12 months capital and revenue costs of the club
£4,800	Sutton Park Junior Parkrun	Towards the set-up costs of a junior parkrun in Sutton Park
£3,600	New Inns Four Oaks Bowling Club	Towards the repair and maintenance of the bowling green
£2,507	Donation 24 - CSPAN	Donation from Sutton Coldfield Community Sport and Physical Activity Network (CSPAN)

£101,418 Advancement of amateur sport

The Walmley Almshouses

Living in an almshouse community can boost the longevity of residents by as much as two-and-a-half years, according to research by Bayes Business School (2023).

At **Sutton Coldfield Charitable Trust** residents are able to live independently within a thriving community in which there are regular social activities, and weekly exercise sessions from a fitness instructor. There is also IT training, thanks to Age Concern, for residents who wish to keep up to date on how to connect and increase digital security and awareness.

We especially appreciate the efforts of Mick Hill, our gardener, for his meticulous attention to the grounds which look vibrant throughout winter and summer. Together with the almshouse manager, property manager and warden, this provides a

dedicated team to maintain the high-quality homes, exceptional environment and swift response to residents' needs, well-being and safety.

Residents' opinions matter to us and they are encouraged to share their views in a variety of ways whether surveys, open meetings, or small groups. The almshouse team is there for any day-to-day concerns.

As a result of listening to residents and the almshouse team we are continually improving arrangements to give residents even more

choice, autonomy and flexibility, and provide more opportunity for social activities that are led and organised by residents themselves.

During the year, Labassiere Consultants, were commissioned to review the trust's almshouse governance to ensure it aligns with the trust's mission and best practices in operational governance, compliance, resident engagement, and risk management. This review has provided the trust with insights and recommendations to refine its robust governance framework so it can continue to improve resident engagement and community wellbeing.

Supporting older people in Sutton Coldfield

We also want our almshouse community to remain consistently welcoming to all and reflect the growing diversity of the royal town, so look forward to putting in place actions from the EDI (equality, diversity and inclusion) review carried out over August to October 2024.

Information about how to apply for an almshouse can be found on our website www.suttoncoldfieldcharitabletrust.com

Dr Fran Murray was chair of the almshouse committee during the year, reflecting his ongoing commitment and the trust's long-standing heritage of continual improvement of housing provision in Sutton Coldfield.



During 2023/2024 the following trustees were members of the almshouse committee:

Dr Fran Murray Chair

Surrinder Bains

Cllr Diane Donaldson

Keith Dudley

(until 6 September 2024)

Inge Kettner

(until 8 February 2024)

Jayne Luckett

Cllr Jane Mosson

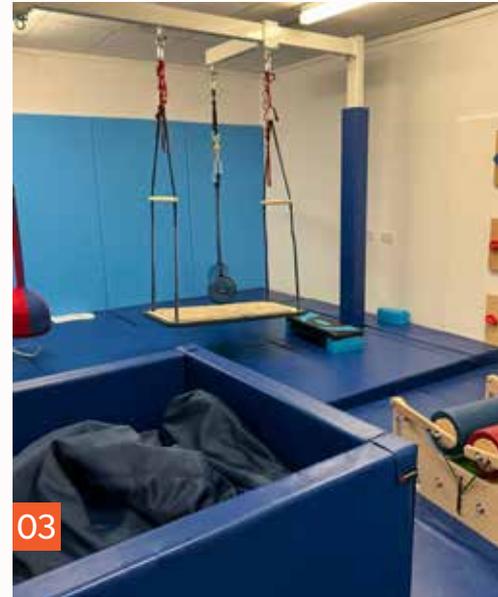
Stuart Roberts

(from 12 Sept 2023)





02



03



04



05

01 Sutton Coldfield Community Games

02 Successful Ageing

03 Langley School Sensory Room

04 Sutton Coldfield Community Games

05 Sutton Coldfield Heritage Network Event

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 four 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, equality, education, engineering, human resources, science, housing, town planning, marketing, accountancy, and local government.

During the year, two new trustees have joined the trust bringing with them experience and knowledge that 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 and/or vice-chair; new trustees have an additional review in their first year.

The board of trustees is responsible for all the trust's activities and meets quarterly to consider and discuss reports, make decisions, and determine strategy.

A strategy day is held at least every two years. Due to the increasing layers of economic austerity, including the financial crisis at Birmingham City Council, two strategy days have been held over the past 12 months to fully consider the impact and risk presented to Sutton Coldfield residents, particularly those facing hardship and requiring support.

The board identifies and manages any risks to ensure the efficient and safe undertaking of its responsibilities. A five year plan and corresponding delivery plan enables trustees to monitor progress and staffing capacity.

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 finance committee has sub-committees for remuneration and risk management.

Whilst each committee has an approved membership, all trustees may attend any committee or sub-committee, with access to agendas and papers through an on-line trustee portal. Advisors join committees to provide specialist guidance. Committee members that are not trustees may also be co-opted for their specialist expertise.

Working groups may be set up for specific purposes. An equality, diversity, and inclusion (EDI) working group was established in 2023 with three trustee EDI champions and members of staff as part of the group.



Review of governance and compliance

Following the publication of the revised Charity Governance Code in 2020, the review and subsequent action plan has progressed. This has led to an overview of equality, diversity, and inclusion. A review of almshouse governance has also been conducted. Each of these reviews has provided opportunity to continue to improve practice and extend our reach.

01 Almshouses

The future

The SCCT five year plan sets a strategic direction from 2023-2028.

The pace of that direction will be determined by the timing of full planning consent on Langley Sustainable Urban Extension (SUE), **which will release further proceeds from prior land sales.**

SCCT has conducted a number of reviews in readiness to mobilise these ambitions and inform future decisions, including the social needs review (2022), Falcon Lodge feasibility study (2023), research into future housing needs (2024).

Integral to these ambitions is our commitment to fostering an environment where equality, diversity, and inclusion are at the core of everything we do.

Actions already in progress for the year ahead include:

- Liaising with the LGBT Charity to ensure our almshouse community is welcoming, affirming and respectful of residents' diversity.
- A review of all our policies, plans and practice to ensure we are truly inclusive.
- Reaching every household through the new Royal Sutton Coldfield Charity News – a newspaper that enables all charities and community groups to engage.

- Profiling the diverse nature of our festive and cultural grants.
- Undergoing assessments towards achieving the **RACE** equality code quality mark.

Reporting

Action & accountability

Composition & data

Education & culture



The **RACE**
Equality
Code

Over the past year we have learned much from working collaboratively with a wide range of community stakeholders.

SCCT is committed to building a more inclusive, equal, and diverse community, both within our organisation and as an exemplar within the wider society.

We believe that by working together, we can create a positive and lasting impact on the lives of those we serve, now and into the future.



01



02



03

01 Sutton Coldfield Choral Society

02 Walmley Golf Club CIC ParaGolfer - SCCT trustee visit

03 Sutton Coldfield Heritage Network event - Town Hall



FIVE AIMS



5 FIVE YEAR PLAN

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.

Equality, Diversity and Inclusion (EDI)

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

**Vision
Mission
Values**

SCCT

Sutton Coldfield Charitable Trust

Financial review

Expenditure

How the trust spends its resources to
30 September 2024

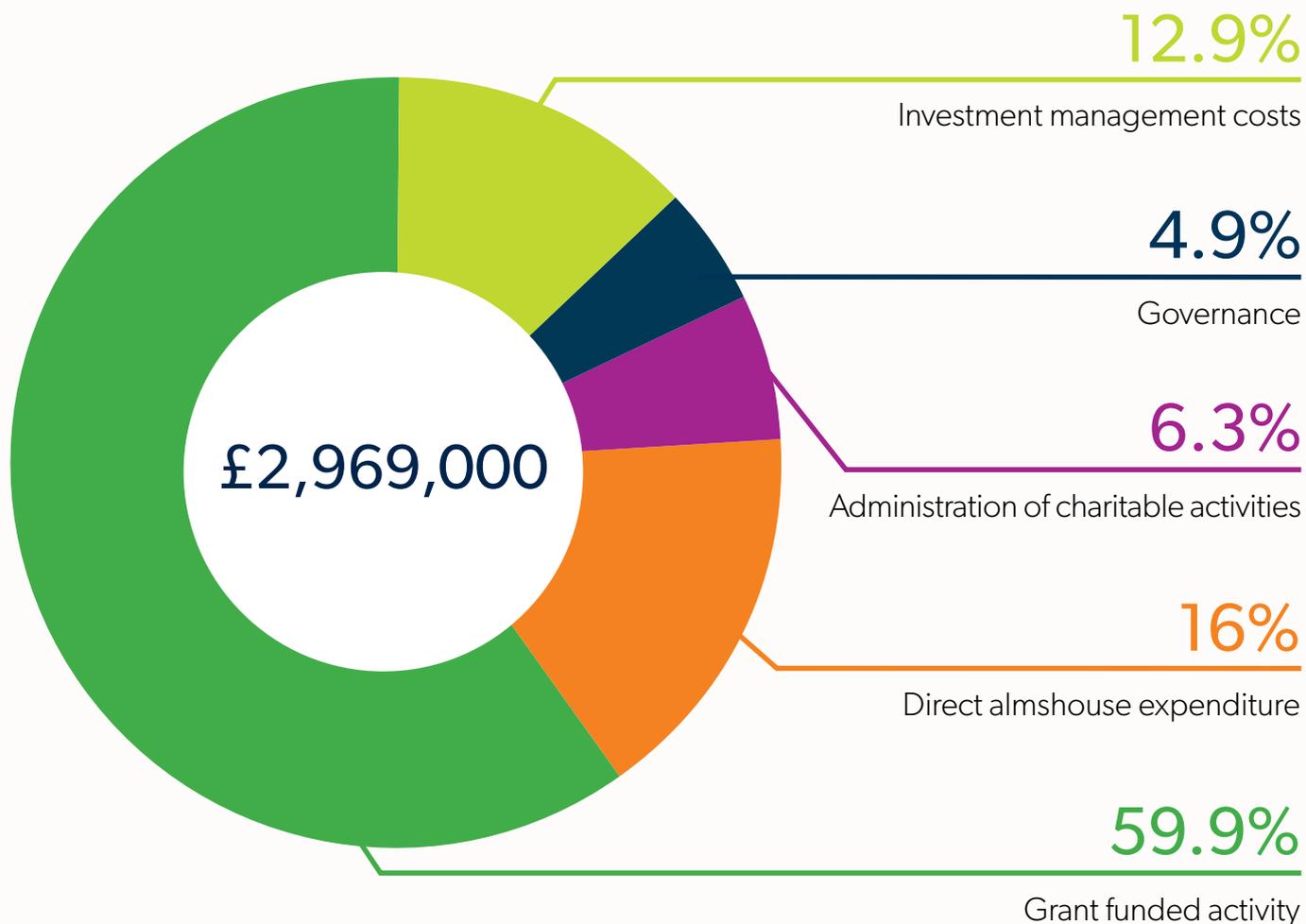
The trust ranks as one of Britain's larger grant making charities in terms of its property, financial assets and annual income. It does not actively raise funds from the public.

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.

The trust has an endowment fund, comprising the Walmley Almshouses (used for our charitable purposes) and capital funds which generate income for the trust's objectives. After an extensive review trustees decided to adopt Total Return Accounting (TRA) from 1 October 2023 which has provided the trust with more flexibility over the endowment fund.

The trust also holds unrestricted charitable funds which it can use as required. Trustees undertook a detailed review of the trust's reserves policy in 2023 and considered it 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 2023/2024, the following trustees were members of the finance committee:

Andrew Morris Chair
(from 8 May 2024)

Neil Andrews Chair
(until 8 May 2024)

Keith Dudley
(until 6 September 2024)

Fahmida Ismail
(from 8 November 2023)

Inge Kettner
(until 8 February 2024)

Brian Maynard
(from 1 April 2024)

Nigel Meredith
(from 8 May 2024)

Helen Miles
Dr Francis Murray
Cllr Simon Ward

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 2023/2024, the following trustees were members of the risk management sub-committee:

Neil Andrews Chair
(until 8 May 2024)

Andrew Burley
Keith Dudley
(until 6 September 2024)

Andrew Morris
(from 8 May 2024)

Inge Kettner
(until 8 February 2024)

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 2023/2024, the following trustees were members of the property committee:

Andrew Burley Chair

Neil Andrews
(until 8 May 2024)

Cllr Diane Donaldson

Keith Dudley
(until 6 September 2024)

Fahmida Ismail

Inge Kettner
(until 8 February 2024)

Brian Maynard
(from 1 April 2024)

Nigel Meredith
(from 8 May 2024)

Andrew Morris

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 2023/2024, the following trustees were members of the remuneration sub-committee:

Neil Andrews Chair
(until 8 May 2024)

Keith Dudley
(until 6 September 2024)

Inge Kettner
(until 8 February 2024)

Helen Miles
Andrew Morris Chair
(from 8 May 2024)

Advisors to the trust

Solicitors

Blackhams

Lancaster House,
67 Newhall Street,
Birmingham B3 1NR

Ansons Solicitors

316-318 Lichfield Road,
Mulberry Walk,
Sutton Coldfield B74 2UG

Mills & Reeve Solicitors

78-84 Colmore Row,
Birmingham B3 2AB

Property Managers

Johnson Fellows LLP

Charter House,
163 Newhall Street,
Birmingham B3 1SW

EOS Surveyors Ltd

Mulberry House,
46-48 Mere Green Road,
Sutton Coldfield B75 5BT

Nick Russell Associates

Lavender Cottage,
Lucton,
Leominster,
Herefordshire HR6 9PH

Auditor

Sayer Vincent LLP

Invicta House,
108-114 Golden Lane,
London EC1Y 0TI

Insurance Broker

Howden UK Brokers Limited

Quadrangle,
Imperial Square,
Gloucestershire GL50 1PZ

Investment Fund Managers

Rathbone Investment Management Ltd

8 Finsbury Circus,
London EC2M 7AZ

CCLA Investment Management

One Angel Lane,
London EC4R 3AB

Investment Consultant

Stanhope Consulting LLP

35 Portman Square,
London W1H 6LR

Bankers

HSBC

Ground Floor, 12 Calthorpe Road
Edgbaston, B15 1QZ

HR Consultants

Colden Human Resources

2a Hollyfield Rd
Sutton Coldfield B75 7SG

Marketing

Gary Phelps Communications

23 Station Road, Wylde Green,
Sutton Coldfield B73 5JZ

Statement of financial activities

For the year ended 30 September 2024

Income from

Investments:

Income from charitable activities

Income from investments

Total Income

Expenditure

Expenditure on raising funds:

Investment property expenses

Investment management costs

Expenditure on charitable activities:

Cost of running almshouses

Grant funding

Total Expenditure

	Unrestricted Funds 2024 £000s	Endowment Fund 2024 £000s	Total Funds 2024 £000s	Total Funds 2023 £000s
	279	–	279	235
	206	1,680	1,886	1,987
	485	1,680	2,165	2,222
	176	46	222	152
	50	143	193	172
	570	102	672	660
	1,882		1,882	1239
	2,678	291	2,969	2,223

Statement of financial activities

For the year ended 30 September 2024

	Unrestricted Funds 2024 £000s	Endowment Fund 2024 £000	Total Funds 2024 £000s	Total Funds 2023 £000s
Net income / (expenditure) before gains or (losses) on investments	(2,193)	1,389	(804)	(1)
Gains on investment assets	566	4,303	4,869	1,111
Net income and net movement in funds	(1,627)	5,692	4,065	1,110
Transfer between funds	1,806	(1,806)	0	0
	179	3,886	4,065	1,110
Trust fund balances brought forward at 1 October	8,531	64,660	73,191	72,081
Fund balances carried forward at 30 September	8,710	68,546	77,256	73,191

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 66, 67 and 68 are a summary of information extracted from the audited trustees' report and financial statements for the year ended 30 September 2024. The full set of financial statements and external auditors' report are available at www.suttoncoldfieldcharitabletrust.com

Balance sheet

30 September 2024

	2024 £000s	£000s	2023 £000s	£000s
Fixed assets:				
Tangible assets	1,340		1,442	
Investment properties	26,915		25,971	
Investments	40,531		37,286	
<i>Total fixed assets</i>		68,786		64,699
Debtors: <i>amounts falling due after more than one year</i>		8,735		8,735
Current assets:				
Debtors	229		230	
Cash at bank and in hand	1,476		1,148	
<i>Total current assets</i>		1,705		1,378
Liabilities:				
Creditors: <i>amounts falling due within one year</i>	(1,764)		(1,527)	
<i>Net current assets/(liabilities)</i>		(59)		(149)
Creditors: <i>amounts due after more than one year</i>		(206)		(94)
Total net assets		77,256		73,191
The funds of the trust:				
Functional endowment fund	1,340		1,442	
Endowment fund	67,206		63,218	
		68,546		64,660
Unrestricted funds:				
Extraordinary repair fund	1,180		1,180	
Environment management fund	27		38	
Charitable fund	7,503		7,313	
Total unrestricted funds		8,710		8,531
Total trust funds		77,256		73,191



- 01 Members of EcoGrow CIC at the allotment
- 02 Acacia Family Support
- 03 Walmley Golf Club CIC - SCCT trustee visit



Sutton Coldfield Charitable Trust

To contact the trust, write or call us at:

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Sutton Coldfield Charitable Trust

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Fox Hollies Road

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You will also find further information on our website:

www.suttoncoldfieldcharitabletrust.com

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