



SCCT

Sutton Coldfield Charitable Trust

2024 2025

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

Registered in England and Wales No. 218627

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About The Trust

Sutton Coldfield Charitable Trust (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 for older people of limited means and by making 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 it 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 the corporation and various related charities within one body. This operated closely alongside the council and was administered by the town clerk. 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

Dr Francis Murray (Chair)
Andrew Morris (Vice Chair)
Surrinder Bains (until 29 August 2025)
Andrew Burley
Cllr Diane Donaldson* (until 19 February 2025)
Bryan Dunn (from 8 February 2025)
Fahmida Ismail
Jayne Luckett (until 28 August 2025)
Rita Martin (until 29 June 2025)
Brian Maynard
Nigel Meredith
Helen Miles (until 8 June 2025)
Cllr Jane Mosson*
Cllr David Pears*
Revd Canon Becky Reeve (from 12 November 2025)
Stuart Roberts
Cllr Kath Scott* (from 29 April 2025)
Cllr Simon Ward**
Danielle Williams (from 12 November 2025)

*Trustees nominated by Birmingham City Council

**Trustees 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

Claire Evans Chief Executive
 (from 10 June 2025)
Tina Swani MBA FCIM Chief Executive
 (until 31 December 2024)
Claire Evans Finance Director
 (until 9 June 2025)
Ngozi Afam Finance Manager
 (from 1 January 2026)
Balvir Reehal Assistant Accountant
 (from 11 March 2025)
Claire Arrowsmith FCCA Property Manager
 (from 11 March 2025)
Clare Haines Grants Manager
Jo Williams Community Grants Officer
Helen Kimmet LLB (Hons) Administration Manager
Donna Gibson Administrator

Almshouses

Emma Baxter Almshouse Manager
Marie Murphy Warden
Mick Hill Gardener (until 30 June 2025)

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 for heritage, greenspaces and community, to grants for individuals and families in need.

Chair's Statement

This Annual Review covers the period from 1 October 2024 to 30 September 2025, marking three years since the launch of the Trust's Five-Year Strategic Plan, Looking Forward to 2028.

This milestone anticipates the Trust's 500th anniversary, celebrating a legacy of adaptation and service to the community over five centuries.

As we approach this historic occasion, we look forward to collaborating with organisations across the Royal Town to plan meaningful celebrations for the 500th Anniversary of the Royal Charter in 2028.

The people of the Trust continue to serve as ambassadors of our mission and custodians of our heritage, guiding it into the future.

We extend our sincere gratitude to Tina Swani, who retired as Chief Executive in December 2024 after five years of dedicated leadership. Claire Evans, formerly our Finance Director, has stepped into the role, bringing continuity and vision to the Trust.

Special thanks also go to Mick Hill, our long-serving Gardener, who retired in June 2025 after 19 years of exemplary service maintaining the grounds at our Walmley site.

We welcomed Balvir Reehal as Assistant Accountant in March 2025, supporting Claire and the team in managing the Trust's finances. In January 2026 Ngozi Afam joined the team as the Trust's Finance Manager.



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We also congratulate Claire Arrowsmith on becoming our Property Manager and leading on a number of key property projects.

Our appreciation extends to Emma Baxter, Almshouse Manager, and Marie Murphy, Warden, for their continued support to staff, Trustees, and residents.

We would also like to thank Birmingham Chamber of Commerce for awarding the Trust with the President's Award during the year.

Charitable Purposes

The Trust's principal objective, as defined by its governing scheme, is to provide housing accommodation for residents of Sutton Coldfield. Any surplus funds are allocated to charitable purposes as determined by the Trustees.

We currently provide 46 high-quality homes at our almshouses in Walmley.

Our budget and total spend on awarding grants for the year was **£1.38 million.**

We thank Clare Haines, Grants Manager, and Jo Williams, Community Grants Officer, for successfully implementing our new grants management system. We also acknowledge Helen Kimmet, Administration Manager, and Donna Gibson, Administrator, for their

01 Fran Murray, Chair

work in developing and launching a digital system for our School Uniform Grant Programme.

Our thanks also go to Issimo and Freeman Clark for supporting us through these implementations. Their efforts have significantly improved operational efficiency and accessibility.

Trustee Transitions

We extend heartfelt thanks to Councillor Diane Donaldson, Jayne Lockett, Rita Martin, Helen Miles and Surrinder Bains for their invaluable contributions as Trustees, as they stepped down during the year.

We warmly welcome Bryan Dunn, Danielle Williams, Revd Canon Becky Reeve and Councillor Kath Scott, who joined the Board, bringing valuable expertise to the Trust. We also welcome Dennis Kennedy who has been appointed as a member of the Grants Committee.

I would like to thank Claire and all our staff for their dedication and achievements during this period of change, and express my gratitude to the Trustees for their support following my appointment as Chair.

Fran Murray

Chair



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03 Beacon Family Services

04 Our Choir

05 Mayor and Mayoress of Sutton Coldfield at the Yearn 2B interfaith lunch



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Chief Executive's 2024/2025 Report



Review of activities and achievements

Almshouses

The Trust continues to assess housing needs in Sutton Coldfield to inform future investment in housing schemes.

During the last 12 months, energy-efficient upgrades have been made to existing properties, including the installation of draft-proof doors.

Grants Programme

Over 30 personal grants were awarded through our partnership with Our Place Support, alongside 125 organisational grants.

Our Festive and Cultural Celebration Grants Programme has been expanded, supporting events throughout the year, including Diwali.



Heritage, greenspaces, and community

Ongoing discussions with Birmingham City Council and Royal Sutton Coldfield Town Council focus on the future of our community centres, which provide vital services and support.

We are actively involved in delivering the Plan for Neighbourhood Fund, ensuring it aligns with community needs.

01 Claire Evans, Chief Executive

02 New Hall Mill

Operational efficiency and inclusion

We advanced our digital transformation by fully implementing online systems for both organisational and school uniform grants. This has improved accessibility and enabled staff to provide more direct community support.

Asset management and cybersecurity

The Trust reviewed its investment strategy during the year and as a result of this the Trust appointed two new investment houses to manage its investment portfolio, Cazenove Capital and Nevara Investment Management Ltd.

In response to increasing cyber threats, we enhanced our IT security through staff and Trustee training and system upgrades.

Claire Evans
Chief Executive

How to Make a Grant Application

In the year 2024/2025, Sutton Coldfield Charitable Trust awarded grants to organisations and individuals amount to £1,378,283.

The Trust welcomes enquiries from individuals and organisations seeking support. Our website has a wealth of information that is regularly updated to help potential applicants develop a funding proposal.

To begin the process, contact should be made with the Trust via our website, by email, letter, or telephone.

When making an initial enquiry, applicants are asked to outline:

- The need or issue your project aims to address
- The amount of funding you are seeking

The grants team is available to discuss your proposal and guide you through the next steps. If your project is eligible, you will be invited to submit a formal application via our online portal.

Applicants should ensure that all required documentation – such as financial accounts, quotations, and supporting materials – is submitted by the deadlines provided. For organisations

that have previously received a capital grant, we typically require a period of three years to have passed before considering a new application.

How grants are awarded

The Trust processes all applications promptly and without unnecessary bureaucracy.

In 2024, the Trust introduced a new digital grant management system to streamline the application process. This system offers a more efficient and user-friendly experience for both new applicants and existing grantees.

Applications are submitted via our online portal, accessible after initial contact with the grants team and completion of an eligibility check. Comprehensive guidance is available throughout the process, and our team is on hand to answer any questions.

The Grants Committee meets regularly.

After reviewing each application, the grants team presents recommendations to the Trustees,

along with a summary of the request and relevant financial information. Trustees carefully consider each proposal, focusing on the potential public benefit, whether through improving individual lives, developing local services or enhancing facilities within the local community.

Applicants' financial circumstances and commitments are also reviewed to assess the level of need. In some cases, additional information may be requested, and decisions may be deferred to a future meeting.

Grant requests exceeding £55,000 are referred to the full Board of Trustees, which meets quarterly, for final approval. School clothing grants are reviewed and approved by the Grants Committee based on reports from the grants team.

All grants must benefit residents of Sutton Coldfield. While most applications come from

local organisations, a small number from outside the area may be considered – particularly where they provide essential services not otherwise available locally, such as specialist healthcare or disability support. In addition, organisational applicants must be not-for-profit and hold a community bank account in their name.

To ensure funds are used appropriately, payments are typically made directly to suppliers upon receipt of invoices. For school clothing grants, vouchers are issued to parents and carers, redeemable only at designated retailers.

Through ongoing publicity and our informative website – www.suttoncoldfieldcharitabletrust.com – we hope to reach those most in need.

We also welcome referrals from community members, schools, GP surgeries, and other organisations who know of individuals who may benefit from our support.



During 2024/2025, the Trust received **125** applications for grants, of which **98%** received awards. School Clothing Grants, benefitting **875** children, were also approved.

Grants Well Spent

Making sure that grants are **well spent**

How the Trust evaluates the benefits:

The Trust works closely with funded organisations to ensure that the intended outcomes of each grant are being achieved. We maintain regular contact to understand how our support is making a difference in communities.

For example:

- Has essential repairs and maintenance at a local sports club improved accessibility and opportunities for local people to participate in physical activity?
- Has the purchase of a minibus improved access to events for older people or enabled scout groups to attend camps?
- Has funding to support children with autism helped meet the needs of both children and their families?
- Has investment in outdoor education facilities at a local primary school enhanced learning experiences for pupils?

To ensure transparency and effectiveness, a formal monitoring process is in place. This allows the Trust to understand how funds are being spent, assess progress, and understand the challenges faced by grantees. It also helps us measure the outcomes achieved and the positive changes brought about by each project.



Depending on the nature of the project, grantees may be required to submit interim and final reports before the full grant is released. Trustees receive quarterly updates summarising project progress, which are reviewed to ensure accountability and alignment with the Trust's objectives.

In addition to written reports, our grants team evaluates impact through regular communication with beneficiaries – via phone calls, online meetings, and site visits. Where possible, we encourage applicants to clearly define their objectives in their initial application, which helps us assess outcomes more consistently.

We also use a variety of digital tools to monitor progress, including video calls and photographic evidence of project milestones and completion. These methods help us stay connected and informed, even when in-person visits are not feasible.

01 Beacon Family Services

02 Rotary Wylde Green CRY heart screening event



Grant Impact Statement

The Trust is dedicated to supporting a wide range of organisations and initiatives that are committed to making a meaningful and lasting difference to the lives of individuals and families within the former borough of Sutton Coldfield and those that have effective solutions to supporting those most in need.

In addition to supporting community organisations, the Trust provides assistance to individuals facing hardship due to factors such as youth, age, ill-health, disability, or other forms of disadvantage.

Each year, the Trust offers school clothing grants in the form of vouchers to eligible low-income families residing in the former Borough of Sutton Coldfield. These grants are available to those in receipt of qualifying benefits, helping to ensure that children have access to appropriate school attire.

In the year 2024/2025, Sutton Coldfield Charitable Trust awarded grants to individuals and organisations amounting to £1,378,283.

Amount awarded

£1,378,283



123

Total
number
of grants*



Average
grant size

£14,342

33
Grants to
individuals



90
Organisation
grants



98% Success
rate for
organisational grants of
which 81% were awarded
full grants.

875
School
uniforms
provided



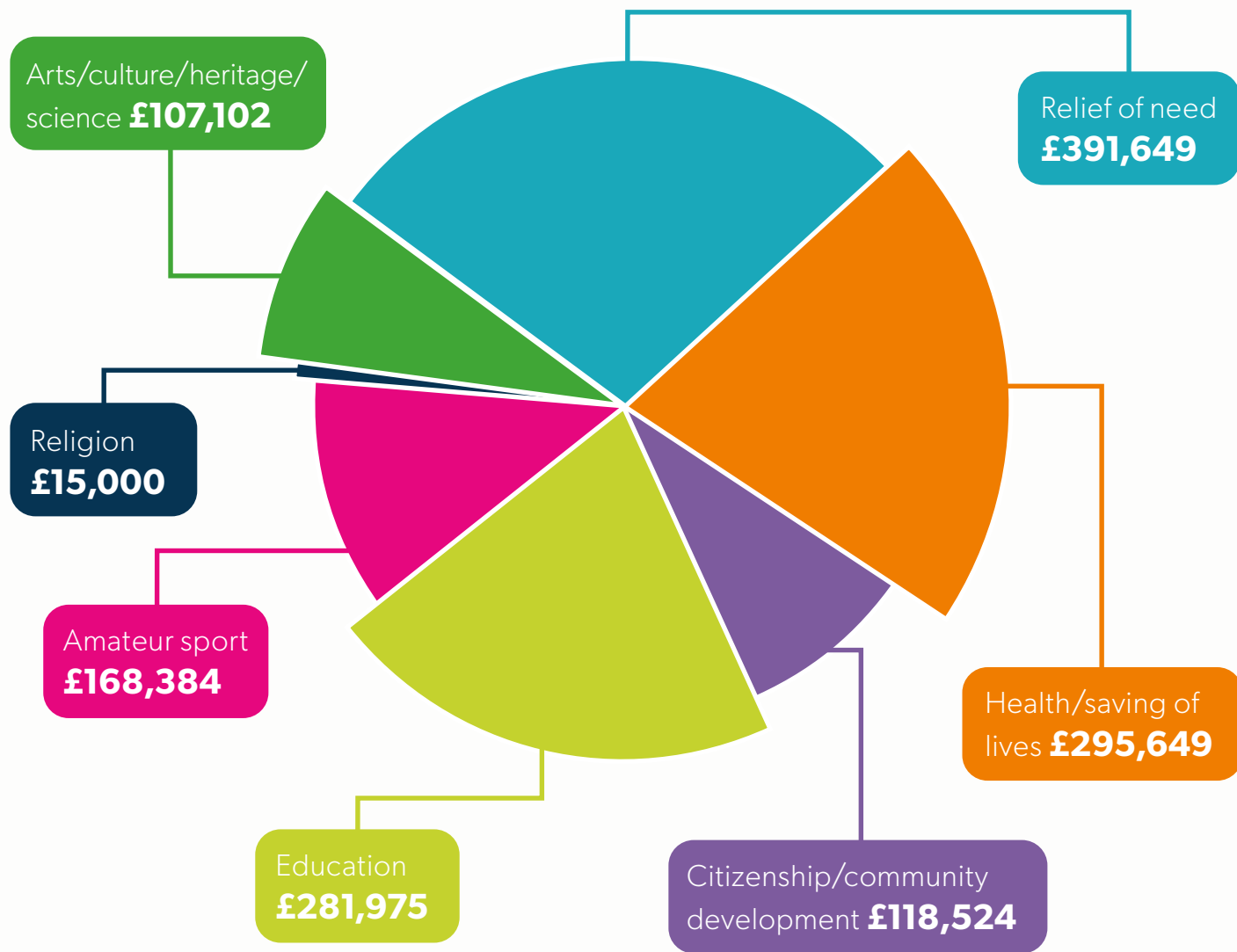
12 New
organisation
beneficiaries



* Excluding school uniform grants

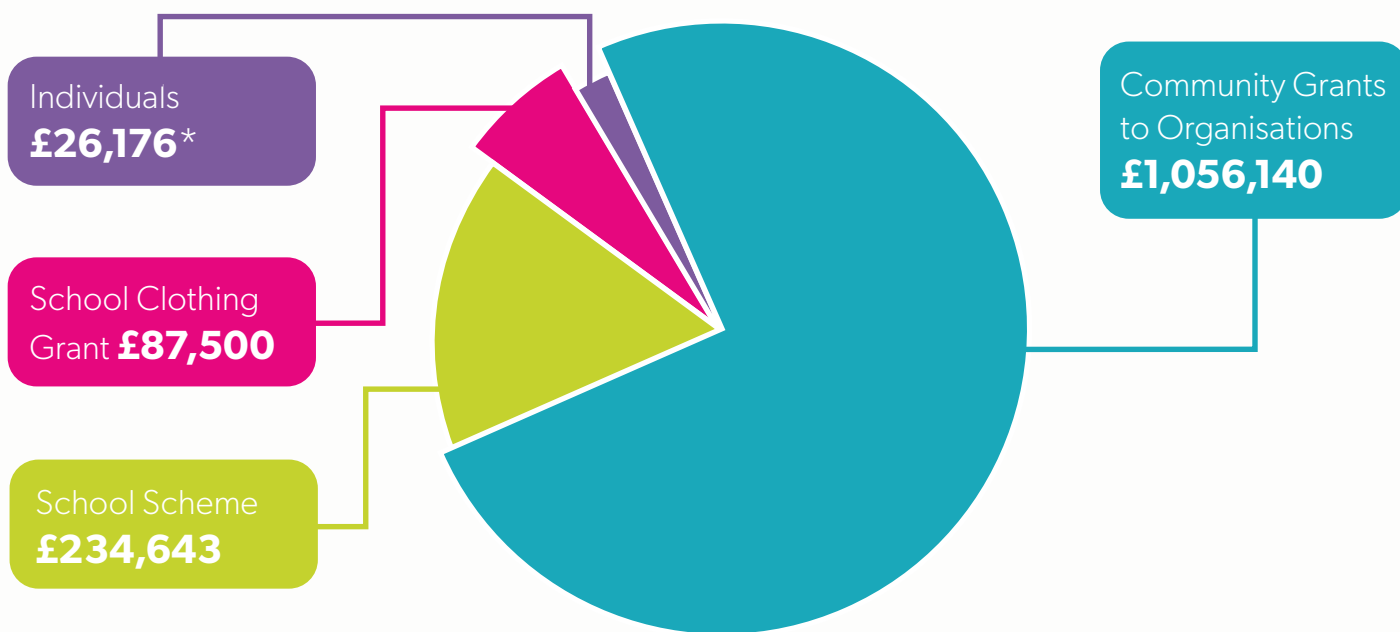
Grants Awarded

by Benefit Category



Grants Awarded

by Grant Programme

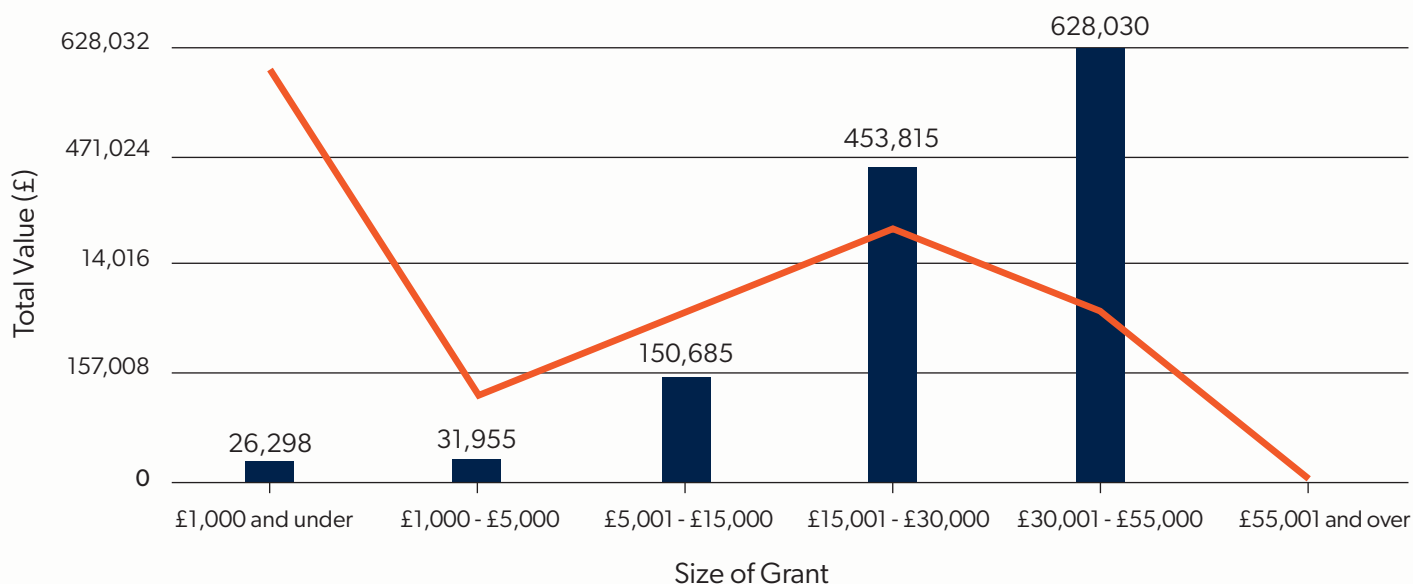


Grant Programme	Number of awards	Total value of awards (£)
Community grants to organisations	78	1,056,140
School scheme grants to organisations	12	234,643
School clothing grants	875 children	87,500
Total	965	1,378,283
Grants to individuals	33	26,176*

*Awarded in 2024/25 to Our Place Support who manages and distributes the Trust's individual grants, across financial years. The value of the Grants to Individuals is therefore included in the Community Grants to Organisations total.

Size of Organisational Grants

Awarded During 2024-25



Size of grant	Number of awards	Total value of awards (£)
£1,000 and under	34	26,298
£1,001 - £5,000	7	31,955
£5,001 - £15,000	14	150,685
£15,001 - £30,000	21	453,815
£30,001 - £55,000	14	628,030
£55,001 and over		
Total	90	1,290,783

■ Number of Awards
■ Total Value (£)

Case Studies

Highlighting the **impact** of grants at a local level

The Trust supports a diverse range of initiatives that enrich local communities by enhancing access to the **arts, culture, heritage, and science.**

MUBU Music – Live in the Lodge

Empowering communities through music

Music has the power to uplift. Creating music not only brings communities together but promotes emotional and mental wellbeing for people of all ages. For many people, getting started with music comes with barriers – whether it's cost, distance, accessibility issues or simply finding the right resources.

“ Live in the Lodge, a pioneering community music group based in Falcon Lodge, is making quality music education accessible and affordable to all.

Founded in 2016 by producer Sam Slater, Live in the Lodge is a free, intergenerational music programme that brings high-quality music education directly to the heart of the community. With over 100 members ranging in age from 5 to 85, the group offers a welcoming and inclusive space where individuals of all backgrounds and abilities can explore music on their own terms.

“Most people who come to us are from Falcon Lodge,” says Sam. “It’s an area where many people experience deprivation, isolation and mental health issues, so we want to give residents the social and psychological benefits music brings.”

The programme is designed to be fully accessible. Whether participants face financial hardship, mobility challenges, or live in sheltered accommodation, Live in the Lodge adapts to meet their needs. Instruments are loaned out for home practice, and lessons – both individual and group – are led by professional musicians. For those seeking formal recognition, the group even funds graded music exams, with some members reaching as high as Grade six.



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01 Live in the Lodge is produced by Mubu Music Projects CIC. Pictured, LIFL participant and Director, Sam Slater (right)



02

“Everyone wants different things out of their music,” Sam explains. “Whether it’s for pure enjoyment, social connection, or a qualification to support college or job applications, we give people the freedom to tailor their own musical journey – knowing that we’ll handle the funding.”

Due to the recent grant of £40,000 from Sutton Coldfield Charitable Trust, the programme has secured its future for another two years. This vital support has removed financial barriers for participants and enabled the group to continue offering lessons free of charge.

02 Live in the Lodge

03 Live in the Lodge has been generously funded and supported in 2025

Beyond education, Live in the Lodge fosters a vibrant performance culture. Members take part in two to three shows each year, including the much-loved Summer Concert, a pressure-free event where anyone can perform regardless of ability.

“It’s all about celebrating progress and the remarkable talent we have,” says Sam. “Our singers have even started arranging performances in care homes, sharing their music with the wider community.”

The programme has successfully rebuilt its membership following the pandemic, returning to pre-Covid levels. Throughout the crisis, support from the Trust was instrumental in keeping the project alive, providing the stability needed to continue serving the community.

Looking ahead, Live in the Lodge would love to see a dedicated space for music-making in Falcon Lodge – ensuring that access to creative opportunities remains right on residents’ doorsteps.

“The enthusiasm and talent in Falcon Lodge is incredible,” Sam reflects. “Thanks to the Trust’s support, we’ve removed financial barriers and continue to help people reach their full potential.”

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GENEROUSLY FUNDED AND SUPPORTED

SCCT
Sutton Coldfield Charitable Trust

William A Cadbury
Charitable Trust

SUTTON COLDFIELD
**NEIGHBOURHOOD
NETWORK SCHEME**

**SCOPS
ARTS
TRUST**

Impact of funding:

Grant awarded: £40,000

Number of registered members: 100

Number of weekly visitors: 100

Project outcomes:

- Free and accessible sessions delivered.
- Intergenerational with focus on developing social connections.
- Accredited music pathways for those seeking qualifications.
- Boosts self-esteem, confidence and positive mental health.

The Trust supports 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.

Grow Family Services

As a parent of a child with special educational needs and disabilities (SEND), it can be difficult to know exactly how to support your child through their unique challenges.

With other SEND organisations mainly providing support aimed at children with SEND, Grow Family Services cast their focus on parents and families. They provide advice, guidance, specialist tools and a feeling of belonging for those seeking support, in order to empower families to address the challenges they face.

Established by Janet Harding and Louise Jordan, both parents of neurodivergent children, Grow Family Services was born from lived experience and a deep



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01 Grow Family Services

understanding of the challenges families face. Grow takes a holistic approach to supporting families. The community group has facilities for parents and children, and open their doors to anyone, regardless of whether a child is officially diagnosed or not.

At the heart of Grow's work are their evening support sessions, held two to three times a month at Four Oaks Methodist Church. These gatherings offer parents the chance to hear from professionals – therapists, paediatricians, and neurodivergence specialists in various forms – while also connecting with others who understand their journey.

“ Talking to these experts can make such a difference for parents, especially if they're in the interim period of waiting for their child's formal diagnosis. The best part of the evening sessions is bringing together the parents so they can see they're not alone,” shares Janet. **“It can feel isolating parenting a child with SEND at times – having that network of parents in the same boat means a lot.”**

Since 2023, Grow Family Services has received two grants from Sutton Coldfield Charitable Trust totaling £56,000. As a result, Grow Family Services are themselves growing. They now have an established office base with a dedicated SEND library and one-to-one space, monthly Dad's Group and regular volunteers. Their SEND Day in 2024 brought together over 40 services – from health, social care and education to charities and local authorities – far exceeding expectations. This year, the event was held at Sutton Coldfield Town Hall, with even more services in attendance, including interactive autism awareness buses.

Impact of funding:

Grant awarded: £56,000

Number of beneficiaries supported: 314, increasing to 500 by 2028.

Project outcomes:

- Established partnerships with local schools.
- 150 teaching professionals trained.
- Founders trained in SEND Law Level 3.
- Free SEND resource library established.
- SEND days delivered bringing together 40+ partners.



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Louise said: "Things have been getting better for children with SEND in schools as staff are becoming more aware of their needs, but budgetary limits and limited training mean there's still only so much schools can do.

Recognising the importance of bridging the gap between home and school, Grow has partnered with local primary schools to offer in-school SEND support. Coffee mornings hosted by Grow help parents feel more comfortable engaging with school staff, while training sessions for teaching assistants – attended by over 150 professionals – introduce specialised equipment and strategies to better support children in the classroom.

Their extensive catalogue of resources, reviewed by occupational and speech therapists, includes sensory regulation tools, weighted blankets, white noise machines, and learning aids. These are available for families and schools to borrow, helping parents feel equipped to support their children at home.

“It’s so helpful for parents to feel empowered,” Janet explains. “To have the knowledge, skills and equipment to support their young person and be aware of potential triggers and how they can be alleviated.”

The Trust’s initial grant also funded IPSEA SEND Law Level 3 training for both founders, enabling Grow to offer free legal advice to families navigating the complexities of SEND support. Today, GPs across Sutton Coldfield refer families to Grow, recognising them as a trusted source of guidance during the often-lengthy wait for formal diagnoses.

“The Trust backed us when we were a small community group,” Janet reflects. “We wouldn’t have reached the milestones needed for other funding without their initial support.”

Louise adds: “The Trust’s funding has provided the foundations we need to move forward and expand our services. It’s given us the confidence to seek further support, knowing we already have that essential basis.”



Grants Awarded

Relief of Those in Need

Grants totalling £391,649 were provided for the relief of those in need across 40 organisations.

In addition, school clothing grants provided support to 875 children with grants totalling £87,500 through 479 successful family applications.

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

North Birmingham Community Gymnastics was awarded a grant in April 2025, to support the revenue costs of creating a new 'quiet gymnasium' space

- 01 North Birmingham Community Gymnasium
- 02 Age Concern Birmingham

to support and expand their highly successful Special Educational Need or Disability programme.

North Birmingham Community Gymnastics provides affordable, accessible gymnastics and movement sessions to all children and young people regardless of their ability or disability in an environment that caters for their needs. Their full-time disability programme

has grown in strength year on year. They cater for all with a Special Educational Need or Disability, right through to those with a profound and multiple learning disability.

The project has created a safe, secure, quiet environment for children that require extra support, enabling them to access a regular, accessible session, tailored to their individual needs.





Age Concern Birmingham enriches the lives of those in need through a range of services. Their vision is to make a positive difference, adding value to people's lives by offering services to promote wellbeing and independence.

In February 2025, a grant was awarded to support the employment of a full-time advisor to offer flexible advice and information services to support a range of residents' needs, including the challenges of fuel poverty.

Support is offered through a variety of means, including drop-in café sessions, booked appointments and home visits.

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 £22,854 were awarded to 30 groups, benefitting over 1,600 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

£87,500	School Clothing Scheme 2025	School Clothing Scheme awards supporting 875 children
£48,710	Spitfire Advice and Support Services	Towards employing a full time Money Advice Case Worker
£45,000	Hope Food North Birmingham	Towards supporting Food Bank provision in Sutton Coldfield
£40,000	Grow Family Services	Towards operational costs for delivery and expansion of the service
£35,892	Erdington Gymnastics Club T/A North Birmingham Community Gymnastics	Towards revenue costs to support a new 'quiet gymnasium' space
£34,871	Special Olympics Sutton Coldfield	Towards operational and equipment costs
£26,167	Our Place Support CIC	To assess, distribute, manage and monitor the Trust's personal grants scheme
£24,000	Age Concern Birmingham	Towards a Community Advice and Information Officer
£15,011	Jacob's Well Coffee House	Towards project activity costs
£7,800	Kidzlikedanny	Towards music therapy teacher fees and room hire
£5,000	Headway Birmingham & Solihull	Towards converting unused storage space into a disabled toilet
£1,000	Hellaby House Residents Association	Festive & Cultural Celebrations
£1,000	St Chads Sunshine Café	Festive & Cultural Celebrations
£1,000	Jacob's Well Coffee House	Festive & Cultural Celebrations
£1,000	Lingard House Residents	Festive & Cultural Celebrations
£1,000	Sutton Coldfield Stroke Club	Festive & Cultural Celebrations
£1,000	Sutton Coldfield Parkinsons UK	Festive & Cultural Celebrations

£1,000	Falcon Lodge Methodist Church	To support internal works at Falcon Lodge Methodist Church to accommodate the services of The Food Pantry
£1,000	Homehall House Residents	Festive & Cultural Celebrations
£1,000	FOLIO Sutton Coldfield Elderberries	Festive & Cultural Celebrations
£1,000	Our Place Support CIC	Festive & Cultural Celebrations
£990	North Birmingham 4 Ukraine	Festive & Cultural Celebrations
£975	East Sutton Churches Together	Festive & Cultural Celebrations
£940	Hargreaves Close Residents Social Group	Festive & Cultural Celebrations
£844	The Oaks – Anchor Housing	Towards the purchase of a greenhouse and staging
£825	NS (RAF) Association	Festive & Cultural Celebrations
£800	Calder Drive Residents	Festive & Cultural Celebrations
£700	Copenhagen Mews	Festive & Cultural Celebrations
£700	Boldmere Methodist Church – Smilers Club	Festive & Cultural Celebrations
£680	Glover's Trust Almshouses	Festive & Cultural Celebrations
£600	Tanner's Close Residents	Festive & Cultural Celebrations
£580	Park Court Residents	Festive & Cultural Celebrations
£500	Elisabeth Court	Festive & Cultural Celebrations
£500	Sutton Coldfield Group Practice PPG (Ley Hill Surgery Tea Club)	Festive & Cultural Celebrations
£500	The Dovecotes Retirement Housing	Festive & Cultural Celebrations
£400	Sutton Youth Diabetes Group	Festive & Cultural Celebrations
£380	Owen Court Residents	Festive & Cultural Celebrations
£324	Birmingham Ileostomy Association	Festive & Cultural Celebrations
£300	Goldieslie Close Residents	Festive & Cultural Celebrations
£160	Sutton Coldfield Seated Exercise for People with MS Group	Festive & Cultural Celebrations

£391,649 Relief of need

Grants for Individuals

Relief provided through the Trust's **personal grants scheme**

During 2024/2025, Sutton Coldfield Charitable Trust funded 33 grants to individuals and families in need.

Grants ranging from £70 – £2,700 were awarded to support the purchase of essential domestic equipment, to help people with disabilities and to help people with long term health problems.

Since 2024, the Trust's personal grants scheme has been managed by Our Place Support, who provides timely, targeted support to individuals and families in crisis – helping them to stabilise their situations and get back on track.

A primary outcome of the scheme is the direct financial assistance in relation to goods to individuals and families experiencing hardship. For some, this provides immediate relief from pressing needs such as essential household items, like beds, kitchenware and laptops. The grants play a crucial role in preventing the escalation of crisis and of people getting into debt.

The team at Our Place Support work one-on-one with clients to assess their wider needs and develop personalised plans to address them. This includes support with budgeting, benefits applications, housing issues, and mental health referrals.

The personal grants scheme aims to help individuals during their time of greatest need, many of which face multiple challenges such as job loss, poor mental health, or the threat of potential homelessness.

01 Our Place Support offers flexible and responsive personal grants for individuals and families in need.



01

The flexible and responsive nature of the personal grants allows Our Place Support to intervene swiftly, often preventing further deterioration and opening potential support to enable individuals to get back on track and become more independent and seek support when needed.

Our Place Support is particularly focused on reaching those who are most vulnerable or underserved. Due to strong statutory and community links, many individuals receive additional help beyond the grant itself, including emotional wellbeing support, family services, and budgeting advice.

The Advancement of Education

Let's learn

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

The Trust operates a long-standing School Grants Scheme designed to advance education in Sutton Coldfield schools.

The scheme follows a three-year cycle, enabling eligible schools to apply within a defined timeframe. Applications are prioritised based on the date of the last grant received and the total number of grants awarded over the past decade. Funding is allocated to support initiatives and purchases that fall outside the scope of statutory provision.

In the past year, £234,643 was awarded to support projects at two secondary schools and ten primary schools. This funding benefited over 6,000 pupils, contributing to the enhancement of extra-curricular activities, IT infrastructure, and learning environments.

Further support is provided through the Trust's main grants programme, which awards funding to not-for-profit organisations delivering educational initiatives. In 2024/25, grants were awarded to Kids UK, BSL Silver, The National Literacy Trust, and Sutton Coldfield Libraries.

Kids UK was awarded a grant of £3,185 to commission new bespoke puppets, which are used to deliver workshops and social education sessions across local schools, churches, community groups, and community events. The charity offers a range of support activities primarily aimed at children aged 7 to 11 years. This funding has enabled Kids UK to continue its programme delivery through the development of high-quality educational resources, enhancing its ability to engage children in a professional, understanding manner while promoting positive moral values.

01 Andi Markham of Kids UK with Jack and Grandad



01

The Trust continued its support for **Sutton Coldfield Libraries** through a grant of **£15,100** to facilitate the delivery of the **2025 Summer Reading Challenge**.

This national initiative is designed to foster a love of reading among primary school-aged children, encouraging continued engagement with books during the summer break. The funding enabled the libraries to deliver an enhanced programme, supporting additional sessions and incentives such as events, activities, and performances.



These enhancements contributed to **increased participation and strengthened the overall impact of the libraries** within the local community.

02 & 03 Sutton Coldfield Libraries – Events at Walmley Library



£30,375	Sutton Coldfield Grammar School for Girls	Towards replacing ageing IT equipment
£22,780	The Royal Sutton School	Towards staffroom enhancements and reading lecterns for classrooms
£22,148	Whitehouse Common Primary School	Towards upgrading the school's IT by replacing out of date equipment
£21,266	Hill West Primary School	Towards improvements to outdoor learning zones
£20,776	Moor Hall Primary School	Towards IT hardware upgrade
£20,629	Four Oaks Primary School	Towards new classroom tables and chairs
£20,433	Coppice Primary School	Towards purchasing new IT equipment and devices
£19,217	Hollyfield Primary School	Towards the development of a new outdoor play area
£18,767	Boldmere Junior school	Towards new iPads, charging stations, and secure server rack data cabinets
£17,640	Walmley Junior School	Towards upgrading the school's IT infrastructure and to purchase and replace out of date equipment
£15,100	Sutton Coldfield Libraries	Towards the 2025 Summer Reading Challenge across Sutton Coldfield Libraries
£14,997	The National Literacy Trust	Towards the First Words Together programme in Sutton Coldfield
£11,057	Boldmere Infant and Nursery School	Towards creating a designated pastoral room
£9,555	Holland House Infant School & Nursery	Towards outdoor play equipment
£8,000	BSL Silver CIC	Towards free BSL classes for Sutton Coldfield residents over a 40-week period
£6,050	Holland House Day Nursery Ltd	Towards resources & equipment for the outdoor learning environment
£3,185	Kids UK	Towards new puppets

£281,975 Advancement of education

The Advancement of the Arts, Culture, Heritage or Science



01 Our Choir members

02 Sutton Coldfield Heritage Network Event

The Trust maintains a **strong commitment to supporting the arts in their broadest form.**

Over the years, several organisations in Sutton Coldfield have benefited from funding to deliver high-quality art, music and cultural initiatives and entertainment for residents.

Over the last 12 months, a total of £107,102 was awarded to projects focusing on the advancement of the arts.

Our Choir received a grant of £5,000 to support its operational costs and to invest in essential equipment and resources. As a local community group, Our Choir offers individuals the opportunity to experience the therapeutic and social benefits of singing in a welcoming and inclusive environment, regardless of their vocal ability. The group presents three major performances annually within the local community and conducts rehearsals that are engaging and explore a

diverse repertoire of music. Over the years, Our Choir has successfully raised significant funds for local charitable causes. The funding provided by the Trust will support the continued growth and sustainability of the choir, helping to enhance its reputation and broaden its impact.

The Trust continued its support for the Sutton Coldfield Heritage Network in its efforts to celebrate the rich and diverse heritage of Sutton Coldfield. A grant of £7,102 was awarded to facilitate the delivery of a programme of events and activities as part of Birmingham Heritage Week 2025. This annual initiative, held each September, aligns with the national Heritage Open Days programme, which has been running for over 25 years. The Sutton Coldfield

programme featured a variety of community-focused events, including guided walks, educational talks, heritage tours and open days.



£50,000	Royal Sutton Coldfield Town Hall Trust	Towards operational costs and long-term financial forecasts
£40,000	MUBU Music	Towards delivery costs of the Live in the Lodge project in Falcon Lodge
£7,102	Sutton Coldfield Heritage Network	Towards a programme of events and activities to support Birmingham Heritage Week 2025
£5,000	Boldmere Futures CIC	Towards revenue costs of the 2025 Boldmere Summer Festival
£5,000	Our Choir	Towards the operational costs of the Choir and the purchase of equipment and resources

£107,102 Advancement of arts, culture, heritage or science

The Advancement of Religion

Faith communities play a significant role in the civic and cultural life of Sutton Coldfield.

The Trust recognises and values the diverse support services these groups provide to a broad spectrum of residents.

Four Oaks Methodist Church was awarded a grant of £15,000 to support the refurbishment of its historic Church Organ.

The organ plays a central role in the Church's activities, regularly accompanying worship services, weddings, funerals, and a variety of musical events and concerts held on-site. This funding contributes to the delivery of the Church's Action Plan, which includes objectives such as increasing engagement with young people and establishing a community-focused music hub. The organ's refurbishment is considered a key foundational step in achieving these goals and enhancing the Church's cultural and outreach initiatives.



01

01 Four Oaks Methodist Church

02 St. James Church, Mere Green



This year marked the successful completion of capital improvement works at St. James Church, Mere Green, following the award of a £44,000 grant to enhance accessibility and community facilities.

The grant, awarded in 2023, was used to reconfigure the internal layout of the church, ensuring the building is fit for purpose for future generations. The project aimed to broaden and diversify the use of the church space, creating a welcoming environment for a wide cross-section of the community and increasing capacity for social and group activities.

Key developments included the installation of a disabled-access toilet, a ramp at the main entrance, and the creation of a community café area, among other improvements.

£15,000 Four Oaks Methodist Church

Towards the refurbishment of the historic Church Organ

£15,000 Advancement of religion

The Advancement of Health or the Saving of Lives

Grants were made to organisations which provide invaluable support to the residents of Sutton Coldfield.

Grants totalling £295,649 were made to 10 organisations which provide invaluable health support to the residents of Sutton Coldfield.

The Trust awarded a grant of **£4,996** to **Birmingham Community Healthcare NHS Foundation Trust Charity** to support the provision of **winter support bags for vulnerable adults** in Sutton Coldfield.

Each bag includes a blanket, hot water bottle, vacuum flask accompanied by soup and hot chocolate sachets, a hat and scarf, as well as a mindfulness colouring book and felt-tip pens.

This initiative is designed as a preventative measure, aiming to reduce hospital admissions by helping vulnerable individuals stay warm, nourished, and comfortable throughout the winter months.



01 Winter Support Bags for vulnerable adults

A grant of **£54,945** was awarded to **Beacon Family Services** to enhance their **specialist therapeutic and mental health support** for children and families in Sutton Coldfield who face challenges accessing timely care.

Working in collaboration with local schools and community organisations, the charity delivers both one-to-one and group-based therapeutic interventions focused on emotional wellbeing, connection, and resilience.

The project prioritises families experiencing barriers to support

due to factors such as trauma, neurodivergence, adoption, care experience, resettlement, or systemic disadvantage. This funding will directly contribute to improved mental health outcomes by ensuring families in Sutton Coldfield have access to tailored, specialist support when and where it is most needed.

£55,000	Acorns Children's Hospice Charitable Trust	Towards palliative care for life-limited and life-threatened babies, children and teenagers from Sutton Coldfield
£54,945	Beacon Family Services CIC	Towards early, therapeutic, mental health support to families in Sutton Coldfield
£46,943	Beyond the Horizon Charity	Towards the salary costs of a Therapist to support children in Sutton Coldfield
£46,344	Our Place Support	Towards Our Place Specialised Mentoring Scheme for 2025-2026
£27,605	The Cancer Support Centre	Towards the cost of rent and room hire fees
£25,000	The Recovery Foundation	Towards the expansion of the mental health creative arts programme
£18,316	The Lily Mae Foundation	Towards providing Memory Boxes and Siblings packs at Good Hope Hospital
£12,500	Birmingham Women's and Children's Hospital Charity	Towards capital costs for play & sensory areas within the new main entrance of Birmingham Children's Hospital
£4,996	Birmingham Community Healthcare NHS Foundation Trust Charity	Towards winter support bags for vulnerable adults in Sutton Coldfield
£4,000	VI Social	Towards core costs of the organisation

£295,649 Advancement of health or the saving of lives

The Advancement of **Citizenship** or **Community Development**

Over the past 12 months, the Trust awarded a total of £118,524 across ten projects, supporting initiatives that promote community development and active citizenship.



In 2024–25, the Trust continued its commitment to funding Festive and Cultural Celebration projects, several of which aligned with the community development benefit category.

Among these, a grant of £1,000 was awarded to Sikhs of Sutton Coldfield to support Mela Punjabana Da – a vibrant, women-only cultural celebration honouring the heritage, traditions, and spirit of Punjabi women. The event brought together over 190 women of all ages to connect through music, dance, food, storytelling, and cultural expression, fostering inclusion and community cohesion.

Yearn 2B CIC was awarded a grant of £1,000 to support the delivery of an interfaith celebration bringing together Christian and Sikh communities in recognition of Easter and Vaisakhi – two significant religious festivals that often occur in April.

The project aimed to foster greater understanding and unity between faith groups by creating a

shared space for cultural exchange, education, and celebration. Through inclusive activities and dialogue, the event encouraged meaningful connections among Christians, Sikhs, and members of the wider community. The initiative also contributed to strengthening interfaith relations and advancing community integration, harmony, and social cohesion in Sutton Coldfield.

£54,950	Chester Road Baptist Church	Towards the salary costs of a Seniors and Bereavement Worker
£18,500	Sikhs of Sutton Coldfield	Towards project costs of the Seniors Club Punjabi
£15,000	Holy Trinity Parish Church Sutton Coldfield	Towards refurbishing the Trinity Centre and making environmental and security improvements
£13,000	Sutton Coldfield Quaker Meeting	Towards an accessible new garden path with handrail, and a handrail for external steps
£12,474	P&S Never Too Late CIC	Towards project costs for a weekly coffee morning in Falcon Lodge
£1,000	Yearn 2B CIC	Festive & Cultural Celebrations – Towards an interfaith event to celebrate Easter and Vaiskhi
£1,000	Sikhs of Sutton Coldfield	Festive & Cultural Celebrations – Towards Mela Punjabana Da ‘Festival of Punjabi Women’
£1,000	Active Citizens Community Volunteers	Towards Gather & Grow Community Allotment project
£1,000	Sutton Parivaar CIC	Festive & Cultural Celebrations – Towards Vijaydashmi Mela (Dusshera Festival)
£600	NS (RAF) Association – Sutton Coldfield	Towards a celebratory event for VE Day

£118,524 Advancement of citizenship or community development

The Advancement of Amateur Sport

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

A total of **£168,384** was awarded to **amateur sports projects** over the last 12 months.

Warwickshire Cricket Foundation was awarded a grant of £6,150 to deliver a series of cricket taster sessions and a summer school cricket festival across primary schools in Sutton Coldfield.

The programme engaged with six local schools, each receiving tailored cricket taster sessions designed to introduce pupils to the sport in a fun and inclusive environment. In addition, the initiative culminated in a summer schools festival, providing an opportunity for participating schools to come together and compete in a friendly, community-focused event.

Through this project, over 900 young people had the opportunity to play, learn, and grow through cricket. Beyond physical activity, the initiative aimed to foster a sense of belonging, promote wellbeing, and develop essential life skills.

Sutton Park Bowling Club was awarded a grant of £15,460 to undertake essential repairs and maintenance to its facilities, ensuring the club remains safe, accessible, and welcoming to both existing members and prospective new participants.

The funding supported critical improvements to the club pavilion and surrounding paving, addressing longstanding

safety concerns and enhancing the overall condition of the site. These upgrades have enabled the club to continue its operations while also improving accessibility for individuals with mobility challenges.



01

- 01 Warwickshire Cricket Foundation
- 02 Sutton Park Bowling Club

By investing in the infrastructure of the club, the project has strengthened its capacity to serve the local community, with the potential to attract new members and promote wider participation in the sport.

The improvements contribute to the long-term sustainability of the club and support its role in fostering social engagement, physical activity, and community wellbeing.



£45,000	Sutton Coldfield Cricket and Hockey Club Ltd	Towards the refurbishment of the clubhouse
£30,000	Four Oaks Saints Cricket Club	Towards improved facilities at the club and to purchase and replace ground equipment
£30,000	Sutton Sailing Club	Towards the expansion and refurbishment of the changing rooms
£25,000	Sutton Coldfield Tennis Club	Towards the installation of a canopy over three new padel courts at the Tennis Club
£15,460	Sutton Park Bowling Club	Towards essential repairs and maintenance work at the club
£12,000	Sutton United Tennis Club	Towards capital costs to make one tennis court wheelchair accessible
£6,150	The Warwickshire Cricket Foundation	Towards project staff costs for cricket taster sessions in schools and a summer schools festival
£4,774	Royal Sutton Coldfield Table Tennis Club	Towards an AC unit, improved kitchen, and a new table tennis table

£168,384 Advancement of amateur sport

Trustee Annual Visits

Celebrating community impact

Each year, Trustees of the Sutton Coldfield Charitable Trust undertake a full day of site visits to projects and organisations that have received funding.

These visits provide a **valuable opportunity to observe the meaningful work being delivered by grant recipients** and to assess the **broader impact of the Trust's support** within the community.

In 2025, Trustees were warmly welcomed by seven organisations, each offering an insightful and inspiring overview of their initiatives. The itinerary included visits to New Hall Mill, St James' Church Mere Green, Langley School,



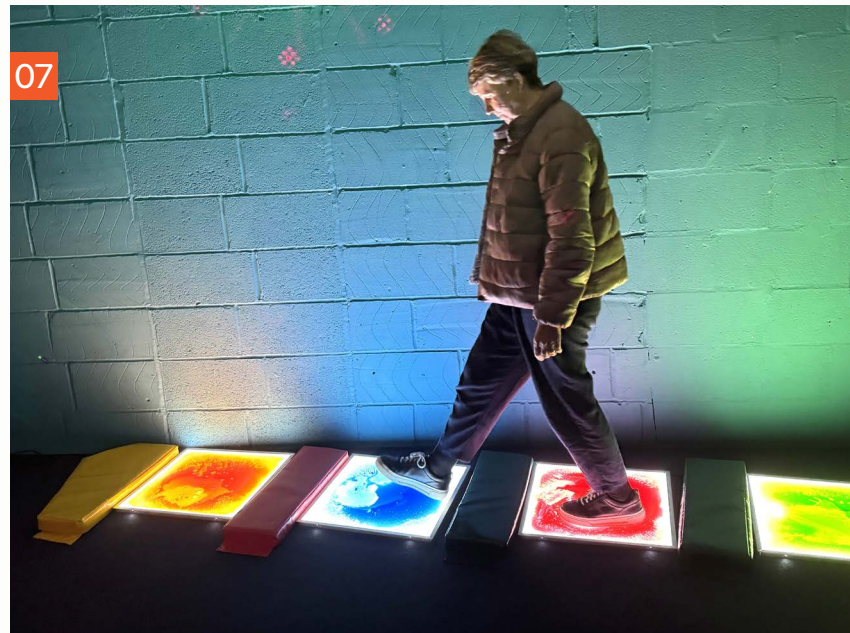
Age Concern Birmingham, The Jericho Foundation at The ReUsers and The Wood Shack, North Birmingham Community Gymnastics, and Live in the Lodge.



These engagements not only **highlighted the diversity of projects supported by the Trust** but also reinforced the **importance of sustained investment in grassroots efforts** that enrich the lives of Sutton Coldfield residents.

- 01 St James Church, Mere Green
- 02 Location of 2025 annual visits
- 03 The Jericho Foundation at The Wood Shack
- 04 Langley School





05 New Hall Mill

06 The Jericho Foundation at The Wood Shack

07 North Birmingham Community Gym



- 08 Live in the Lodge
- 09 Age Concern Birmingham – Communita Café
- 10 Langley School Sensory Room
- 11 North Birmingham Community Gym

The Walmley Almshouses

Historical development

The first almshouses on the Walmley estate were constructed in 1863.

These original four units were later converted in 1982 to accommodate the Trust's current offices.

The building proudly displays a blue plaque awarded by the Civic Society, recognising its historical significance and the Trust's enduring commitment to local housing provision.

The Trust's current housing portfolio consists of 46 residential units, a guest room, a warden's flat, and a dedicated communal area

known as the Lingard Suite. This suite features a resident lounge, conservatory, craft room, and IT room, enhancing the quality of life for all residents.

Accommodation features

Each almshouse comprises:

- One double bedroom
- A shower room
- A kitchen
- A living room

All units are equipped with emergency pull cords, smoke detectors and carbon monoxide detectors that are linked to the warden call system and careline. Stairlifts are also installed in upper-floor

Supporting older people in Sutton Coldfield

residences to ensure accessibility. The properties are set within spacious, well-maintained gardens in the heart of Walmley village, offering excellent transport links and convenient access to shops and local services.

Community and resident engagement

Residents benefit from the independence of private living while enjoying a vibrant and supportive community environment.

A wide range of regular social activities are organised by the Trust's Warden and Almshouse Manager, fostering engagement, wellbeing, and connection among residents.

These activities include weekly sessions such as card bingo, regular bingo, arts and crafts, knit and natter, film nights, and IT support. In addition, residents participate in themed social events throughout the year, including cultural celebrations such as Burns Night, St Patrick's Day, St George's Day, VE Day, Remembrance Day, and Christmas. Seasonal gatherings for Valentine's Day and Halloween further enrich the social calendar.

The Trust also hosts an annual summer party for residents and Trustees and arranges external outings such as riverboat cruises and theatre visits, providing opportunities for recreation and community building beyond the residence.

Feedback is actively encouraged through routine meetings and annual surveys, ensuring that residents have a voice in shaping their living environment.

01 The Walmley Almshouses

Comments from the most recent residents' survey show that residents appreciate the accommodation and services provided by the Trust.

“ A very pleasant place, I feel very happy and secure here”

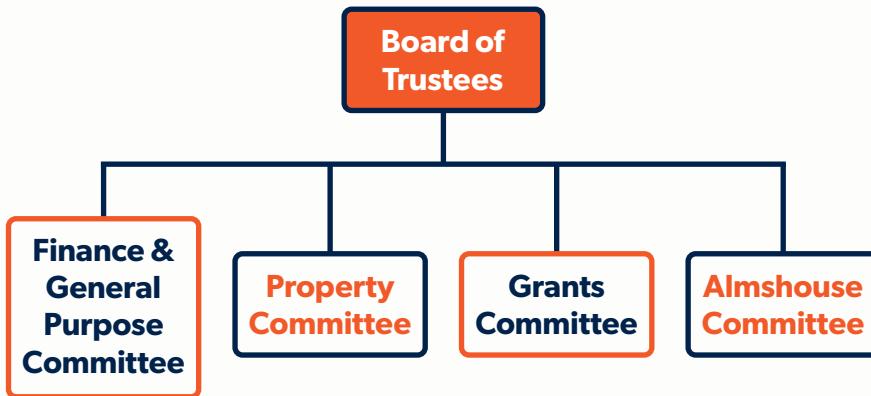
Ongoing investment and modernisation

The Trustees are committed to continuous improvement and modernisation of the almshouses to meet contemporary living standards.

Recent upgrades include the installation of new front doors across all properties. These enhancements not only improve the aesthetic appeal but also contribute to energy efficiency, resulting in cost savings for residents.



How the Trust is Governed



The Trust is administered within the terms of its governing document (the Scheme dated 25 February 2021) as registered with the Charity Commission for England and Wales.

In accordance with the Scheme, 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.

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

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. This 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, four 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 role of the Board of Trustees is to:

- **Oversee the operation of the Trust and ensure the Charitable objects are met.**
 - **Ensure the Trust is administered in line with the requirement of the Scheme.**
 - **Ensure the financial health and endowment funds of the Trust are maintained at a level sufficient to meet the objectives of the Trust.**
 - **Agree the overall strategic direction of the Trust.**
-

The Board of Trustees meet quarterly in accordance with its Terms of Reference, to make decisions, and determine strategy. The Board has overall responsibility to identify and mitigate risk and to ensure that the management of its investments and accounts are robust.

The Board has appointed a number of committees to oversee specific aspects of the Trust's activities. Each committee has an agreed Terms of Reference and reports directly to the Board.

Committees

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

- **Almshouse Committee**
- **Grants Committee**
- **Finance and General Purpose Committee**
- **Property Committee**

In addition, the Finance Committee has a sub committee for remuneration.

Each committee meets quarterly, with the exception of the Grants Committee which meets 7 times per year. 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.

The Future

The Trust's Five Year Plan sets a strategic direction from 2023-2028.

The Trust's Five Year Plan outlines a clear strategic direction.

Together, staff and Trustees are shaping long term plans that will secure the Trust's future and deepen its impact on Sutton Coldfield.

To guide future decisions, the Trust has commissioned key reviews on the future needs in Sutton Coldfield.

These include

- **the Social Needs Review** (2022)
- **Falcon Lodge Feasibility Study** (2023), and
- **Research into future housing needs** (2024).

The outcomes of these studies will assist in determining the future path of the Trust. Integral to these decisions is the Trust's commitment to fostering an environment where equality, diversity, and inclusion are at the core of everything it does. The pace of the progress will be contingent on the release of

additional funds from the sale of land within Langley Sustainable Urban Extension (SUE).

Over the next twelve months, the Trust will continue to digitise key operational and security processes to enhance efficiency and support a paper-free environment.

Looking forward to 2028, celebrating the Trust's 500-year anniversary is more than just a milestone – it is a moment to honour and reflect on the Trust's legacy. As we plan for this event, **we will be sharing ideas with the community that reflect our shared journey and vision for the future.**



FIVE AIMS





FIVE
YEAR
PLAN

Looking forward to 2028

Vision
Mission
Values

SCCT

Sutton Coldfield Charitable Trust

The 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 the Trust and all that we do

Regular theme

Learning how we may make a positive environmental contribution

Advisors to the Trust

Support in
2024-2025

Bank

HSBC

Ground Floor,
12 Calthorpe Road,
Edgbaston, B15 1QZ

CCLA

One Angel Lane,
London, EC4R 3AB

Pension Consultants

Partners Wealth Management Ltd

30 New Road,
Solihull, B91 3DP

Auditor

Sayer Vincent LLP

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

Commercial Property Consultants

Johnson Fellows LLP

Charter House,
180 Newhall Street,
Birmingham, B3 1SW

Insurance Broker

Howden UK

Brokers Limited

Executive,
Quadrangle,
Imperial Square,
Gloucestershire, GL50 1PZ

Lingard House

Property Consultants

EOS Surveyors Ltd

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

Agricultural Property Consultants

Nick Russell Associates

Lavender Cottage,
Lucton, Leominster,
Hereford, HR6 9BH

Solicitors

Ansons

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

Blackhams

Lancaster House,
67 Newhall Street,
Birmingham, B3 1NR

Investment Managers

Casenove Charities

1 London Wall Place,
London, EC2Y 5AU

Navera Investment Management Ltd

Riverside House,
2a Southwark Bridge Road,

Investment Consultant

Stanhope Conduiting LLP

Portman Square,
London, W1H 6LR

Marketing

Gary Phelps
Communications Ltd

ICT Director Services

Freeman Clarke
Head Office: 30 St. Giles,
Oxford, OX1 3LE

Human Resources

**Colden Human
Resources**
The Bungalow,
2A Hollyfield Road,
Sutton Coldfield, B75 7SG

IT Support

**EBS (Electronic
Business Systems)**
852 Tyburn Road,
Birmingham, B25 9NT

Web Design/ Graphic Design **UC4**

The Priory, London Road,
Sutton Coldfield, B75 2SH

Specialist Salesforce Consultancy

Issimo
9 Bryn Street, Talsarnau,
Gwynedd, LL47 6UD



Financial Review

Expenditure

How the Trust spends its income to
30 September 2025

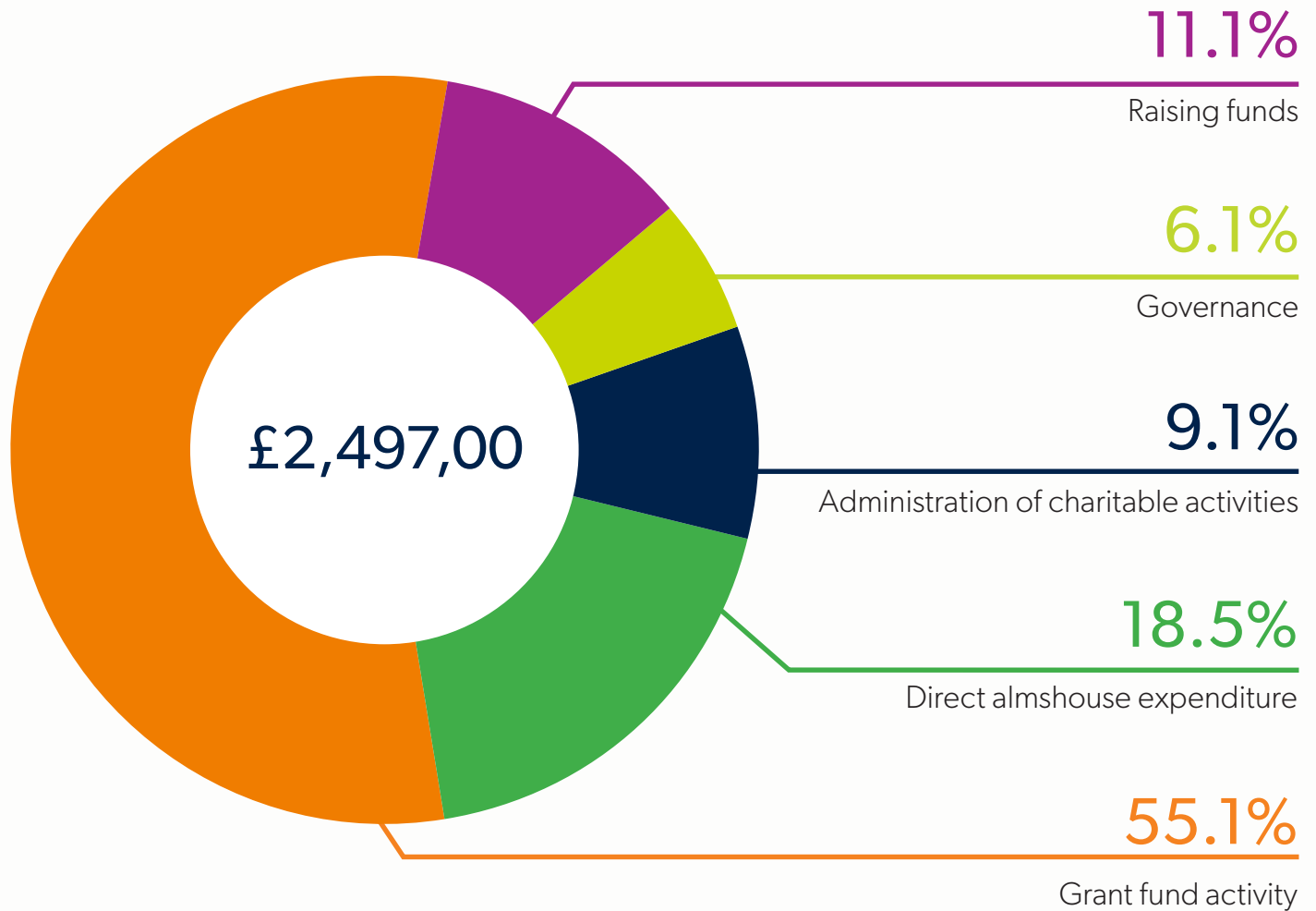
The Trust ranks as one of Britain's larger grants making charities in terms of its property, financial assets and annual income. It does not actively raise funds from the public.

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 are not available for distribution, but 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 retains free unrestricted reserves to the extent considered necessary to ensure that adequate funds are available to cover future expenditure items and contingencies which may not otherwise be covered by incoming resources (e.g. major repairs, improvement or rebuilding of the trust's properties to include the Almshouses). The Trustees undertook a detailed review of the Trust's reserve policy in 2023 and have continued to review this annually.



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 and General Purposes 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 2024/2025, the following Trustees were members of the Finance and General Purposes Committee:

Andrew Morris (Chair)

Fahmida Ismail

Nigel Meredith

Dr Francis Murray

Cllr Simon Ward

Brian Maynard

Helen Miles

(until 8 June 2025)

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 2024/2025, the following Trustees were members of the Property Committee:

Andrew Burley (Chair)

Fahmida Ismail

Nigel Meredith

Andrew Morris

Cllr Diane Donaldson

(until 19 February 2025)

Bryan Dunn

(from 19 February 2025)

Brian Maynard

(until 19 February 2025)

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 2024/2025, the following Trustees were members of the Remuneration Sub-Committee:

Andrew Morris (Chair)

Dr Francis Murray

Brian Maynard

(from 19 February 2025)

Helen Miles

(until 8 June 2025)

Grants Committee

meets at least seven times a year.

During 2024/2025, the following Trustees were members of the Grants Committee:

Andrew Burley
(Chair)

Cllr Jane Mosson

Cllr David Pears

Brian Maynard
(from 19 February 2025)

Stuart Roberts
(from 21 May 2025)

Surrinder Bains
(until 29 August 2025)

Jayne Luckett
(until 28 August 2025)

Rita Martin
(until 29 June 2025)

Danielle Williams
(from 12 November 2025)

Revd Canon Becky Reeve
(from 12 November 2025)

Dennis Kennedy
(Committee member from 12 November 2025)

Almshouse Committee

meets at least four times a year.

During 2024/2025, the following Trustees were members of the Almshouse Committee:

Dr Francis Murray
(Chair)

Cllr Jane Mosson

Stuart Roberts

Surrinder Bains
(until 29 August 2025)

Cllr Diane Donaldson
(until 19 February 2025)

Jayne Luckett
(until 28 August 2025)

Danielle Williams
(from 12 November 2025)

Revd Canon Becky Reeve
(from 12 November 2025)



01 Yearn 2B – Interfaith Lunch

02 Sutton Coldfield Community Games

Statement of Financial Activities

For the year ended 30 September 2025

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 2024-5 £000s	Endowment Funds 2024-5 £000s	Total Funds 2024-5 £000s	Total Funds 2023-4 £000s
	337	–	337	279
	117	1,445	1,562	1,886
	454	1,445	1,899	2,165
	178	44	222	222
	62	94	156	193
	545	98	643	672
	1,476	–	1,476	1,882
	2,261	236	2,497	2,969

Statement of Financial Activities

For the year ended 30 September 2025

	Unrestricted Funds 2024-5 £000s	Endowment Funds 2024-5 £000	Total Funds 2024-5 £000s	Total Funds 2023-4 £000s
Net income / (expenditure) before gains or (losses) on investments	(1,807)	1,209	(598)	(804)
Gains on investment assets	42	2,443	2,485	4,869
Net income and net movement in funds	(1,765)	3,652	1,887	4,065
Transfer between funds	1,840	(1,840)	0	0
	75	1,812	1,887	4,065
Trust fund balances brought forward at 1 October	8,710	68,546	77,256	73,191
Fund balances carried forward at 30 September	8,785	70,358	79,143	77,256

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 2025. The full set of financial statements and external auditors report are available at www.suttoncoldfieldcharitabletrust.com

Balance Sheet

30 September 2025	2025 £000s	£000s	2024 £000s	£000s
Fixed Assets:				
Tangible assets	1,242		1,340	
Investment properties	27,240		26,915	
Investments	40,379		40,531	
<i>Total fixed assets</i>		68,861		68,786
Debtors: <i>amounts falling due after more than one year</i>		8,735		8,735
Current Assets:				
Debtors	351		229	
Cash at bank and in hand	2,929		1,476	
<i>Total current assets</i>		3,280		1,705
Liabilities:				
Creditors: <i>amounts falling due within one year</i>		(1,398)		(1,764)
<i>Net current assets/(liabilities)</i>		1,882		(59)
Creditors: <i>amounts due after more than one year</i>		(335)		(206)
Total net assets		79,143		77,256
The funds of the Trust:				
Functional endowment fund	1,242		1,340	
Endowment fund	69,116		67,206	
		70,358		68,546
Unrestricted funds:				
Extraordinary repair fund	1,180		1,180	
Environment management fund	9		27	
Charitable fund	7,596		7,503	
Total unrestricted funds		8,785		8,710
Total trust funds		79,143		77,256



01

01 Sutton Coldfield
Community Games

02 Special Olympics
Sutton Coldfield football
team in their new kit



02



Sutton Coldfield Charitable Trust

To contact the Trust, write or call us at:

The Chief Executive

Sutton Coldfield Charitable Trust

Lingard House

Fox Hollies Road

Sutton Coldfield B76 2RJ

Email. info@suttoncharitabletrust.org

Tel. 0121 794 0970

You will also find further information on our website:

www.suttoncoldfieldcharitabletrust.com

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