

CHARITY COMMISSION ANNUAL RETURN 2005

Part A.

Registered number 287037

Main charity name GREENFIELDS EDUCATIONAL TRUST

A1. Financial year covered by this form

This should be completed for the financial year ending on or after 1 January 2005.

Enter changes/new financial information below:

Financial year start	_____	01/09/2004	_____
Financial year end	_____	31/08/2005	_____
Next financial year end	_____	31/08/2006	_____

A2. Gross income and total expenditure

Extract the charity's **gross income and total expenditure** from the accounts prepared for the financial year shown above. Do not include the gross turnover/income of connected trading companies.

Gross income	_____	£	1,388,379.00 p
	pence MUST be rounded up/down to the nearest £		
Total expenditure	_____	£	1,396,664.00 p

A3. Correspondent details

The charity correspondent is the person recorded on the Register of charities as the point of contact for the charity. Their name and address will be displayed on our website and will also be used by the Commission to contact the charity. A charity correspondent may be a person (ie, a named individual); or an organisation (eg, a firm of solicitors acting as correspondent for the charity); or simply the charity itself (eg, "The National Aid Association").

If any current details (shown right) are incorrect please provide correct details in full under **Changed details** overleaf

If the correspondent is a person and the name details are incorrect or incomplete please enter all elements of the name

If the correspondent has changed please enter full details of the new correspondent overleaf

If any part of the address is incorrect, please enter the full address overleaf

If the correspondent is a person please note that all of the following are now required to help maintain the accuracy of the Register of Charities

- ▶ All of the correspondent's personal names (also known as first or given names)
- ▶ All of the correspondent's family names (also known as surnames)
- ▶ The correspondent's date of birth

You may also enter, as a suffix, honours the correspondent would like to appear after his or her name, eg BSc, OBE

If the correspondent prefers to be known by some name other than that obtained by combining the title, personal names, family names and suffixes, then you may also enter preferred name (eg, "Steve Henry" for Mr Steven Henry)

Current details

Correspondent is:- A person

Title:-

Personal

names:-

BEVERLEY

Family

names:-

CROFT

Suffixes:-

Preferred

name:-

BEVERLEY CROFT

Date of Birth:-

Organisation

name:-

Tel no 01342 822189

Fax no

Address:- GREENFIELDS SCHOOL
PRIORY ROAD
FOREST ROW
EAST SUSSEX

RH18 5JD

Manuscript changes to the above will not be accepted, please use the boxes overleaf.

Name of person Correspondent is A person An organisation (please only cross one)

Title
Personal
names
Family
names
Suffixes

Preferred
names

Date of
birth

Name of organisation (if correspondent is an organisation)

Organisation
name

Telephone and fax number details

Tel no

Fax no

Correspondent's address details

Address

Post code

■ **A4 Charity trustees** ■

The charity trustees are the persons responsible under the charity's governing document for controlling the management and administration of the charity.

We have pre-printed the details of your charity's trustees according to our records. Please check that these details are correct. If amendments need to be made, please complete the changes under "Amended details" adjacent to the relevant trustee.

4.1 Corporate body as the trustee of the charity

This part will only be pre-printed if we know that the charity has a corporate body as its trustee, e.g. a Parish Council or NHS Trust. Please ensure the organisation name, address and telephone/fax details are correct. If they are incorrect please enter a new set of details under "Amended details". If this section is blank and your charity has a corporate body as trustee, please enter the organisation's details in full under "New corporate body as trustee of the charity".

No longer a trustee

Amended details

Corp body

Corp body

Tel no

Tel no

Fax no

Fax no

Address 1

Address 1

Address 2

Address 2

Address 3

Address 3

Address 4

Address 4

Address 5

Address 5

Postcode

Postcode

Only complete this box if the charity has a corporate body as its trustee, e.g. a Parish Council or NHS Trust

Corp body	Address 3
Tel no	Address 4
Fax no	Address 5
Address 1	Postcode
Address 2	

■ **4.2 Named individuals who are trustees of the charity** ■

If the trustees are individuals, the details that we hold will be printed below. If any part of a name is incorrect or incomplete, please enter the correct name details in full (including the title, personal name, family name and date of birth).

If any part of the address is incorrect or incomplete, please enter the correct address and postcode in full.

If an individual listed is no longer acting as a trustee, please put a cross in the box "No longer a trustee" and we will remove them from our records. New trustees (or trustees that have been acting for some time but are not listed) should be entered in the spaces provided.

Please ensure that we have a complete set of details for each trustee. Trustees without a complete set of details may not be recorded on our Register of Charities.

Please note that all of the following are now required:

- ▶ The trustee's title or titles (eg Mr, Mrs, Reverend).
- ▶ All of the trustee's personal names (also known as first or given names).
- ▶ All of the trustee's family names (also known as surnames).
- ▶ The trustee's date of birth (this will be used for identification purposes only and will not be made available to the public).
- ▶ Suffixes (honours the trustee expects to appear after his or her name, eg OBE).

If the trustee prefers to be known by some name other than that obtained by combining the title, personal names, family names and suffixes, a preferred name may also be entered.

		No longer a trustee		
001	Please put a cross in this box if this person is the Chair of the charity			Amended details
Title	<input type="text"/>		Title	<input type="text"/>
Personal names	<input type="text"/>		Personal names	<input type="text"/>
Family name	<input type="text"/>		Family name	<input type="text"/>
Suffixes	<input type="text"/>		Suffixes	<input type="text"/>
Preferred name	<input type="text"/>		Preferred name	<input type="text"/>
Date of birth	<input type="text"/>		Date of birth	<input type="text"/>
Tel no	<input type="text"/>		Tel no	<input type="text"/>
Fax no	<input type="text"/>		Fax no	<input type="text"/>
Address 1	<input type="text"/>		Address 1	<input type="text"/>
Address 2	<input type="text"/>		Address 2	<input type="text"/>
Address 3	<input type="text"/>		Address 3	<input type="text"/>
Address 4	<input type="text"/>		Address 4	<input type="text"/>
Address 5	<input type="text"/>		Address 5	<input type="text"/>
Postcode	<input type="text"/>		Postcode	<input type="text"/>

Named individuals who are trustees of a charity – continued

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002

No longer a trustee

Please put a cross in this box if this person is the Chair of the charity



Amended details

Title MR
 Personal names PETER DAVID
 Family name HODKIN
 Suffixes
 Preferred name MR PETER DAVID HODKIN
 Date of birth
 Tel no
 Fax no
 Address 1
 Address 2
 Address 3
 Address 4
 Address 5
 Postcode

Title
 Personal names
 Family name
 Suffixes
 Preferred name
 Date of birth
 Tel no
 Fax no
 Address 1
 Address 2
 Address 3
 Address 4
 Address 5
 Postcode

003

No longer a trustee

Please put a cross in this box if this person is the Chair of the charity

Amended details

Title MRS
 Personal names JENNIFER ANN
 Family name SCARFE-BECKETT
 Suffixes
 Preferred name MRS JENNIFER ANN SCARFE-BECKETT
 Date of birth
 Tel no
 Fax no
 Address 1
 Address 2
 Address 3
 Address 4
 Address 5
 Postcode

Title
 Personal names
 Family name
 Suffixes
 Preferred name
 Date of birth
 Tel no
 Fax no
 Address 1
 Address 2
 Address 3
 Address 4
 Address 5
 Postcode

004	No longer a trustee	Please put a cross in this box if this person is the Chair of the charity	Amended details
Title		Title	
Personal names		Personal names	
Family name		Family name	
Suffixes		Suffixes	
Preferred name		Preferred name	
Date of birth		Date of birth	
Tel no		Tel no	
Fax no		Fax no	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
Address 4		Address 4	
Address 5		Address 5	
Postcode		Postcode	

	No longer a trustee	Please put a cross in this box if this person is the Chair of the charity	Amended details
Title		Title	
Personal names		Personal names	
Family name		Family names	
Suffixes		Suffixes	
Preferred name		Preferred name	
Date of birth		Date of birth	
Tel no		Tel no	
Fax no		Fax no	
Address 1		Address 1	
Address 2		Address 2	
Address 3		Address 3	
Address 4		Address 4	
Address 5		Address 5	
Postcode		Postcode	

No longer a trustee		Please put a cross in this box if this person is the Chair of the charity	Amended details
Title			Title
Personal names			Personal names
Family name			Family name
Suffixes			Suffixes
Preferred name			Preferred name
Date of birth			Date of birth
Tel no			Tel no
Fax no			Fax no
Address 1			Address 1
Address 2			Address 2
Address 3			Address 3
Address 4			Address 4
Address 5			Address 5
Postcode			Postcode

No longer a trustee		Please put a cross in this box if this person is the Chair of the charity	Amended details
Title			Title
Personal names			Personal names
Family names			Family name
Suffixes			Suffixes
Preferred name			Preferred name
Date of birth			Date of birth
Tel no			Tel no
Fax no			Fax no
Address 1			Address 1
Address 2			Address 2
Address 3			Address 3
Address 4			Address 4
Address 5			Address 5
Postcode			Postcode

A5. Charity's email address

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The email address that the charity wishes to be shown to the public.

Please enter the charity's new or amended email address below.

The email address that the charity wishes to be used for contact by the Commission

Please enter the charity's new or amended email address below.

The Charity no longer has an email address

A6. Charity's website details

Charity's website details

Please enter the charity's new or amended website address below.

The Charity no longer has a website address

A7. Working names

Some charities like to use a working name as well as their main name. If we have a working name on record for your charity it is listed below.

Delete any working names that are no longer used or shown incorrectly below by crossing the associated box, and enter any new working name using the boxes provided.

1 GREENFIELDS SCHOOL

Delete

2 GREENFIELDS HELP CENTRE

Delete

3 EFFECTIVE EDUCATION CENTRE

Delete

Enter your new or amended working name below

Sort code

Account number

Account name

If the above information is incorrect (or blank), please enter a complete set of bank or building society details below. We only require the details of your primary account and these details will not be made available to the public.

Bank sort code

- -

Bank / building society account number

Account name

■ A9. Classification of charities ■

The Register of Charities classifies charities using three 'elements'. This makes it easier for potential donors, beneficiaries and others to find the charities they want.

We have shown your "Present Classification" below for you to check. If the information is wrong, please amend it by crossing the appropriate "remove" or "add" boxes next to each classification.

Every charity should select at least one category in each of the three elements to describe what they do.

Element 1 - Topic (What does your charity set out to do?)

	Present classification	Remove	Add
101 General charitable purposes	—	—	
102 Education/training	— X —	—	
103 Medical/health/sickness	—	—	
104 Disability	—	—	
105 Relief of poverty	—	—	
106 Overseas aid/famine relief	—	—	
107 Accommodation/housing	—	—	
108 Religious activities	—	—	
109 Arts/culture	—	—	
110 Sport/recreation	—	—	
111 Animals	—	—	

■ Classification of charities – continued

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	Present classification		Remove	Add
112 Environment/conservation/heritage	—	—		
113 Economic/community development/employment	—	—		
114 Other or none of these	—	—		

Element 2 - Beneficiaries (Who does your charity help?)

	Present classification		Remove	Add
201 Children/young people	—	X	—	
202 Elderly/old people	—		—	
203 People with disabilities	—		—	
204 People of a particular ethnic or racial origin	—		—	
205 Other charities/voluntary bodies	—		—	
206 Other defined groups	—		—	
207 The general public/mankind	—	X	—	

■ Element 3 - Method of operation (How does your charity operate?) ■

	Present classification		Remove	Add
301 Makes grants to individuals (includes loans)	—	—		
302 Makes grants to organisations (include schools, charities etc.)	—	—		
303 Provides other finance (eg pensions /investment fund)	—	—		
304 Provides human resources (eg staff/volunteers)	—	—		
305 Provides buildings/facilities/open space	—	—		
306 Provides services (eg care/counselling)	—	X	—	
307 Provides advocacy/advice/information	—	—		
308 Sponsors or undertakes research	—	—		
309 Acts as an umbrella or resource body	—	—		
310 Other or none of these	—	—		

B1. Fund-raising (charities with an annual income exceeding £1 million need not answer this question)

- a Does the charity engage in fund-raising?
If "No" go directly to B2 Yes ☒ No
- b State the **gross amount received from all fund-raising efforts** during the financial year £ 9,827
- c State the **gross total expenditure in the financial year connected with fund-raising efforts** £
- d Does the charity make use of **professional fund-raisers or commercial participators**?
If "no" go directly to B2 Yes No
- e If 'Yes', does the charity have a formal written agreement satisfying the requirements of Part II of the Charities Act 1992 with each of the **professional fund-raisers or commercial participators**? Yes No

B2. Trustees - general

- a If your charity works with **vulnerable beneficiaries**, are new trustees checked with the Criminal Records Bureau? Yes ☒ No
- b Do people other than the trustees vote at meetings of the trustees? Yes No ☒
- c Have all the trustee meetings in the last two years been quorate? Yes ☒ No

B3. Trustees - benefits

For the purposes of B3 and B4 "charity trustees" includes any persons, companies, or other bodies connected with them.

- a Expenses incurred by the charity trustees including travel, meals, accommodation and telephone costs. Do not include items which **charity trustees** purchase on behalf of the charity and for which they are reimbursed by the charity at the price they paid e.g. stationery and equipment supplies £ 0
- b Amounts paid or payable to the trustees for any professional services provided to the charity £ 0
- c Amounts paid or payable to the trustees for any other services provided to the charity. Include salaries, wages and honoraria, as well as payments for services other than professional services £ 14,027
- d Other amounts paid or payable to the trustees. Do not include the purchase of **trustee indemnity insurance**. £ 0
- e If any payments were made under b,c, or d, do the **charity trustees** have specific authority (either in the governing document of the charity or from the Court or the Charity Commission) to make all these payments? Yes ☒ No

B4. Trustees - property

Please see the note at the beginning of B3. For the purposes of B4, property should include freehold or leasehold land or buildings, vehicles and computers etc. If applicable, zero should be inserted.

- a If the charity sold any property to any of the **charity trustees** without **authority** during the financial year, then please state the total value of the property sold £ 0

■ B4. Trustees - property – continued

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- b** If the charity purchased any property from any of the **charity trustees** without **authority** during the financial year, then please state the total value of the property purchased £ 0
- c** If the charity occupies any land or buildings belonging to any of the **charity trustees**, then please state the total amount paid during the financial year in respect of that occupation £ 0
Include rent or licence fee, any premium or capital payment and all other payments made under the tenant's covenants in the lease or under the terms of the licence e.g. on repairs or improvements to the property.

■ B5. Dealings with connected trading companies

- a** Does the charity have any **connected** trading companies?
If 'No' go directly to B6 Yes No X
- b** Give the total outstanding balance of all loans made by the charity to the **connected** trading companies as at the end of the financial year given in A1 (from the accounts) £
- i** Are all the loans (in B5b) secured? Yes No
- ii** Do the **connected** trading companies pay interest on all the loans (in B5b) at commercial rates? Yes No
- iii** Are all the loans (in B5b) repayable within a period specified in each of the loan agreements? Yes No

The amount of the loans for each connected trading company is the maximum it owed at any time during the financial year. The total amount is the sum of all these maximum amounts.

- c** Has any money originally loaned to a **connected** trading company not been repaid, but has instead during the financial year
- i** been subscribed by the charity for the issue of new shares in that company (i.e. converted to share capital)? And/or Yes No
- ii** been written off? Yes No

If the charity's accounts provide for the partial or total non-repayment of a loan made by the charity, then treat the loan as "written off".

- d** State the total amounts due at the end of the financial year to the charity from the **connected** trading companies excluding loans £

This could include amounts owing to the charity for goods and services provided, or service charges, or as a result of charging expenses of the company to the charity.

- e** Please give the following details about all the charity's connected trading companies for the last complete financial year ending on or before the last day of the financial year given in A1
- i** Overall total turnover £
- ii** Overall total profit or loss on ordinary activities before taxation (losses should be shown by placing figures in brackets) £

For present purposes, profit or loss on ordinary activities should be calculated before deducting any gifts made to the charity

- iii** Total amounts transferred to the charity £

These should include amounts transferred by deed of covenant, gift aid, dividend or any similar means. Transfers by deed of covenant or gift aid should be treated as having been made by the company in the financial year in which they are treated for tax purposes as being made

■ B6. Misappropriation of assets

- a** During the financial year, have any of the charity's assets been stolen or otherwise misappropriated by a person who was, at the time, associated with the charity (whether the assets or their value have been recovered or not)? Yes No X
- "Associated with" includes charity trustees, custodian trustees, holding trustees, officers, agents or employees and clients or beneficiaries of the charity or any persons, companies or other bodies connected with them.
- b** Please state the amount of money or value of the assets which have been stolen or otherwise misappropriated £

Those who give answers that they know or suspect are untrue or misleading may be committing an offence.

I certify that the information given in this form is correct to the best of my knowledge and has been brought to the attention of all the charity trustees.

Signed, by one of the charity trustees on behalf of all charity trustees

Peter David Hodgkin

Date 29 06 2006

Title (Please use BLOCK CAPITALS)

Mr

Full Name (Please use BLOCK CAPITALS)

PETER DAVID HODKIN

Daytime telephone number

You may find it useful to keep a copy of your completed form.

Contact details

Address The Charity Commission for England and Wales
PO Box 1155
LIVERPOOL
L69 3XR

Contact Centre 0845 300 0218

Internet Address: www.charitycommission.gov.uk

Data protection

The Charity Commission is a Data Controller as defined by the Data Protection Act 1998 and holds personal data for the purposes of maintaining the Register of Charities and certain other statutory functions as assigned by Parliament. The Charity Commission complies with the Data Protection principles set out in the Data Protection Act 1998 in relation to personal data which is supplied to us via the Annual Return, our website and through the performance of its statutory role as a regulator of charities, to the extent that the Act requires us to do so. These principles restrict the powers of a data controller to disclose third parties' personal data which it is processing.



Annual Return 2005

Part C Only complete this section if your charity's gross income is £1 million or more

Summary Information Return

This return is intended to comprise a **summary** of the **key** information in the Annual Trustees' Report and Accounts and in other documents.

Charity
name:

GREEN FIELDS EDUCATIONAL
TRUST

Charity
number:

287037

For the year ended:

31/08/2005

Question 1: The charity's aims

What are your charity's aims?

The advancement of education

Further details can be
obtained from:

Memorandum of Association

Question 2: Who benefits?

a) Who benefits from the charity's work?

School children

b) How do you respond to their needs and how do they influence the charity's development?

The charity operates a private school and a free literacy centre

Further details can be
obtained from:

Trustees' annual report

Question 3: The charity's strategy

a) What are the key elements of your charity's medium to long-term strategy?

To deliver first class education to meet the needs of students, and to expand our facilities to meet demand.

b) How does your charity measure the success of the strategy?

By the number of students serviced and the interest shown in our work.

Further details can be obtained from:

Independent Schools Association

Question 4: The charity's objectives and achievements

What were your charity's main annual objectives and were they achieved?

Objective	Achievement
To continue to improve the school to the standards of the ISA, and continue the operation of the literacy centre	Substantial improvements were achieved!

Question 5: The charity's income and expenditure

a) What were your charity's sources of income in the year and how much did each generate?

Income source	% of gross income	£000
1. Voluntary income	0.7%	9,817
2. Activities for generating funds		
3. Investment income	1.5%	21,135
4. Incoming resources from charitable activities	97.8%	1,357,427
5. Other incoming resources		
Total	100%	1,388,379

b) What were your charity's most significant activities in the year, and how much did it spend on them?

Charitable activities	Cost £000
Providing education	1,388,347
Other	8,317
Total expenditure on charitable activities	1,396,664
Total expenditure	1,396,664
Explanatory comments	

c) What were your charity's three main fundraising activities in the year, and much did each generate and cost?

Fundraising activity	Income generated £000	Cost of activity £000
1. Raising donations for literacy Centre	9,817	—
2.		
3.		
Other		
Total voluntary income and activities for generating funds	9,817	
Total cost of generating voluntary income and fundraising trading		—
Explanatory comments		

Further details can be obtained from:

Greenfield's HELP Centre

Question 6: The charity's financial health

How would you describe your charity's financial health at the end of the period?

Good.

Further details can be obtained from:

Question 7: The next year

a) How will the overall performance last year affect your charity's medium to long-term strategy?

Progress has been made.

b) What are your charity's main annual objectives for the next year?

To deliver first class education to meet the needs of students, and to expand our facilities to meet demand.

Further details can be obtained from:

Greenfield's Educational Trust

Question 8: The charity's governance

How does your charity ensure that its governance arrangements are appropriate and effective?

The charity has a management team overseen by a board of trustees who meet regularly.

Further details can be obtained from:

Greenfields Educational Trust.

Please also ensure that you have submitted Parts A and B of the Annual Return 2005

Declaration

Those who give answers that they know or suspect to be untrue or misleading may be committing an offence.

I certify that the information given in this form is correct to the best of my knowledge and has been brought to the attention of all the charity trustees.

Signed by one of the charity trustees on behalf of all trustees:



Date: 29/6/02

Title: MR

Full name: PETER DAVID HODKIN

Daytime telephone number:

You may find it useful to keep a copy of your completed form.

Contact details

Address: The Charity Commission for England and Wales
PO Box 1155
Liverpool
L69 3XR

Contact Centre 0870 333 0123

Internet address www.charitycommission.gov.uk

Charity Commission Annual Return 2006

PART A

Registered number **287037**

Main charity name **GREENFIELDS EDUCATIONAL TRUST**

A1 Financial year covered by this form

Please complete for the Financial Year ending on or after **1 January 2006**.

Financial year start **01/09/2005**

Financial year end **31/08/2006**

Next financial year end **31/08/2007**

A2 Gross income and total expenditure

Extract the charity's **gross income and total expenditure** from the accounts prepared for the financial year shown above. Do not include the gross turnover/income of connected trading companies.

Gross income £1,247,537 . 00 p

Total expenditure £1,341,537 . 00 p

PART B

B1 Fund-raising (charities with an annual income exceeding £1 million need not answer this question)

a Does the charity engage in **fund-raising**? (If 'No', go directly to B2) Yes ☐ No ☐

b State the **gross amount received from all fund-raising efforts** during the financial year £

c State the **gross total expenditure in the financial year connected with fund-raising efforts** £

d Does the charity make use of **professional fund-raisers** or **commercial participators**? (If 'No', go directly to B2) Yes ☐ No ☐

If 'Yes', does the charity have a formal written agreement satisfying the requirements of Part II of the Charities Act 1992 with each of the **professional fund-raisers** or **commercial participators**? Yes ☐ No ☐

B2 Trustees – benefits

For the purposes of B2 and B3 “**charity trustees**” includes any persons, companies, or other bodies **connected** with them. Also “the charity” includes any company or other body connected with it.

- a **Expenses** incurred by the charity trustees including travel, meals, accommodation and telephone costs. Do not include items which **charity trustees** buy on behalf of the charity and for which they are repaid by the charity at the price they paid, e.g. stationery and equipment supplies £ 0

State the total amounts paid or payable (excluding expenses as detailed above) to the charity trustees during the financial year from the charity's funds.

- b Amounts paid or payable for any **professional services** provided to the charity £ 0

- c Amounts paid or payable for any other services provided to the charity. Include salaries, wages and honoraria, as well as payments for services other than professional services £ 0

- d Other amounts paid or payable. Do not include the purchase of **trustee indemnity insurance** £ 0

- e If any payments were made under b, c or d, do the **charity trustees** have specific authority (either in the governing document of the charity or from the court or the Charity Commission) to make these payments?

Yes

No

B3 Trustees – property

Please see the note at the start of B2. For the purposes of B3, property should include freehold or leasehold land or buildings, vehicles and computers etc. If the figure is zero, insert zero.

- a If the charity sold any property to any of the **charity trustees** without **authority** during the financial year, then please state the total value of the property sold £
- b If the charity purchased any property from any of the **charity trustees** without **authority** during the financial year, then please state the total value of the property purchased £
- c If the charity occupies any land or buildings belonging to any of the **charity trustees**, then please state the total amount paid during the financial year for that occupation. Include rent or licence fee, any premium or capital payment and all other payments made under the tenant's covenants in the lease or under the terms of the licence, e.g. on repairs or improvements to the property £

B4 Dealings with connected trading companies

- a Does the charity have any **connected** trading companies? (If 'No', go directly to B5) Yes ☐ No ☒
- b Give the total outstanding balance of all loans made by the charity to the **connected** trading companies as at the end of the financial year given in A1 (from the accounts) £
- i Are all the loans (in B4b) secured? Yes ☐ No ☐
- ii Do the **connected** trading companies pay interest on all the loans (in B4b) at commercial rates? Yes ☐ No ☐
- iii Are all the loans (in B4b) repayable within a period specified in each of the loan agreements? Yes ☐ No ☐

The amount of the loans for each connected trading company is the maximum it owed at any time during the financial year. The total amount is the sum of all these maximum amounts.

- c Has any money originally loaned to a **connected** trading company not been repaid, but has instead during the financial year:
- i been subscribed by the charity for the issue of new shares in that company (i.e. converted to share capital)? Yes ☐ No ☐
- ii been written off? Yes ☐ No ☐

If the charity's accounts provide for the partial or total non-repayment of a loan made by the charity, then treat the loan as "written off".

- d State the total amounts due at the end of the financial year to the charity from the **connected** trading companies excluding loans £

This could include amounts owing to the charity for goods and services provided, or service charges, or as a result of charging the company's expenses to the charity.

- e Please give the following details about all the charity's connected trading companies for the last complete financial year ending on or before the last day of the financial year given in A1
- i Overall total turnover £
- ii Overall total profit or loss on ordinary activities before taxation (losses should be given by placing figures in brackets) £

For present purposes, calculate profit or loss on ordinary activities before deducting any gifts made to the charity.

Total amounts transferred to the charity £

These should include amounts transferred by gift aid, dividend or any similar means. Treat transfers by deed of covenant or gift aid as having been made by the company in the financial year in which they are treated for tax purposes as being made.

B5 Misappropriation of assets

- a During the financial year, have any of the charity's assets been stolen or otherwise misappropriated by a person who was, at the time, associated with the charity (whether the assets or their value have been recovered or not)? Yes ☐ No ☒

"Associated with" includes **charity trustees**, custodian trustees, holding trustees, officers, agents or employees and clients or beneficiaries of the charity or any persons, companies or other bodies **connected** with them.

- b State the amount of money or value of the assets which have been stolen or otherwise misappropriated £

- c Has your charity received any of the following:

- i A large donation (£5,000 or more) from a person unknown to the charity? Yes ☐ No ☒
- ii Donations conditional upon particular individuals or organisations being used to do work for the charity? Yes ☐ No ☒
- iii Donations in cash for a certain period of time, the charity to receive the interest, but the principal to be returned to the donor? Yes ☐ No ☒

- d Do you have in place measures to protect your charity's income from abuse by **money launderers**? Yes ☐ No ☐

Declaration

Those who give answers that they know or suspect are untrue or misleading may be committing an offence.

I certify that the information given in this form is correct to the best of my knowledge and **has been brought to the attention of all the charity trustees**

Signed by one of the
charity trustees on behalf
of all charity trustees

Date 19/06/2007

Title MRS

Please use BLOCK CAPITALS

Full Name ANGELA LOCKEY

Please use BLOCK CAPITALS

Daytime telephone
number 01342 828267

You may find it useful to keep a copy of your completed form.

Contact Details

Address The Charity Commission for England and Wales
PO Box 1225
LIVERPOOL L69 3UL

Charity Commission Direct 0845 300 0197

Internet address www.charitycommission.gov.uk

Data Protection

The Charity Commission is a Data Controller as defined by the Data Protection Act 1998 and holds personal data for the purposes of maintaining the Register of Charities and certain other statutory functions as assigned by Parliament. The Charity Commission complies with the Data Protection principles set out in the Data Protection Act 1998 in relation to personal data which is supplied to us via the Annual Return, our website and through the performance of its statutory role as a regulator of charities, to the extent that the Act requires us to do so. These principles restrict the powers of a data controller to disclose third parties' personal data which it is processing. However, the name, address and telephone number of the charity contact and the names of the charity trustees will be publicly available on the Charity Commission website. In addition, the Charity Commission has a statutory obligation under section 84 of the Charities Act 1993 to provide to any person upon request copies of, or extracts from, any document in its possession which is open to public inspection. This will include the Public Register of charities as well as any governing documents, annual reports or



Annual Return 2007 (Online)

GREENFIELDS EDUCATIONAL TRUST

Charity Number: 287037

Submitted on 30 June 2008

Some of the information you have given in this form will be made publicly available in accordance with s.3(8) of the Charities Act 1993. For your information, we have marked those fields with the symbol - P. Full guidance on each section of the form is contained in the Guidance Notes booklet.

This form shows the information you have entered through the Annual Return 2007 Online.

**The Annual Return was submitted online by MRS ANGELA LOCKEY on
30 June 2008**

PART A - Charity Information

A1 - FINANCIAL YEAR

This Annual Return form should be completed for financial years on or after 1st January 2007.

Financial year start - P	01 September 2006
Financial year end - P	31 August 2007
Next financial year end	31 August 2008

A2 - INCOME AND EXPENDITURE

This shows your charity's gross income and total expenditure for the financial year shown at A1. PLEASE NOTE THESE FIGURES ARE ROUNDED TO THE NEAREST POUND.

Gross income - P	£1,331,474
Total expenditure - P	£1,414,696

A3 - CHARITY CONTACT

The contact details for your charity are printed below..

Your current contact is an: individual

Title:

Personal Names:

Family Name:

Preferred Name: - P

Suffix:

Date of Birth:

Telephone: - P

Mobile:

Your contact details as shown on
the public register are - P

BEVERLEY CROFT

01342 822189

BEVERLEY CROFT
GREENFIELDS SCHOOL
PRIORY ROAD
FOREST ROW
EAST SUSSEX
RH18 5JD

A4 - CORPORATE TRUSTEE

Your charity has no corporate trustees

A5 & A6 - CURRENT INDIVIDUAL TRUSTEES

Printed below is the list of current trustees who are individuals that we hold for your charity.

Please note, the addresses given should be the trustees' home address rather than a work or the charity address. Please ensure that we have a complete set of details for each trustee. Trustees without a complete set of details may not be recorded on our Register of Charities.

We only publish trustee names on the Register. Other personal details are not made publicly available

The Commission may email trustees who have given us a personal email address with important updates about trusteeship from time to time. Your charity has told us that their trustees **wish to receive these updates**

Trustee 1

Title:

Personal Names:

Family Name:

Suffix:

Preferred Name: - P

Date of Birth:

Address

MR DAVID BERNARD GAIMAN

Post Code

Telephone:

Email:

Chair of the Charity - P

NO

Trustee 2

Title:

Personal Names:

Family Name:

Suffix:

Preferred Name: - P

MR PETER DAVID HODKIN

Date of Birth:

Address

Post Code

Telephone:

Email:

Chair of the Charity - P

YES

Trustee 3

Title:

Personal Names:

Family Name:

Suffix:

Preferred Name: - P

MRS JENNIFER ANN SCARFE-BECKETT

Date of Birth:

Address

Post Code

Telephone:

Email:

Chair of the Charity - P

NO

A7 - AREA OF OPERATION

It is important that the Register of Charities accurately reflects where your charity operates. Below is the area of operation we currently hold for your charity.

1 EAST SUSSEX

A8 - CHARITY CLASSIFICATION

Printed below are the details we currently hold for your Charity

WHAT your charity sets out to do: - P

	101 General Charitable Purposes
✓	102 Education/Training
	103 Medical/Health/Sickness
	104 Disability
	105 Relief of Poverty
	106 Overseas aid/Famine relief

	107 Accommodation/Housing
	108 Religious activities
	109 Arts/culture
	110 Sport/recreation
	111 Animals
	112 Environment/Conservation/Heritage
	113 Economic/Community development/Employment
	114 Other charitable purposes

WHO your charity helps: - P

✓	201 Children/Young people
	202 Elderly/Old People
	203 People with disabilities
	204 People of a particular ethnic or racial origin
	205 Other charities/Voluntary bodies
	206 Other defined groups
✓	207 General public/Mankind

HOW your charity operates: - P

	301 Makes grants to individuals
	302 Makes grants to organisations
	303 Provides other finance
	304 Provides human resources
	305 Provides buildings/facilities/open space
✓	306 Provides services
	307 Provides advocacy/advice/information
	308 Sponsors or undertakes research
	309 Acts as umbrella or resource body
	310 Other charitable activities

A9 - CHARITY ACTIVITIES

Your charity has given the Commission the following brief description of its activities: - P

To establish, maintain and operate schools and other educational establishments.

A10 - EMAIL FOR PUBLIC DISPLAY

This is a public address that will be displayed on the Register of Charities.

Your current public email address - P info@greenfieldsschool.com

A11 - EMAIL FOR CHARITY COMMISSION USE

This is an address that will be used only by the Commission for contacting the charity.

Your current private email address

A12 - CHARITY WEBSITE

If the charity has its own website and we hold the address, a hyperlink will be available for the public to access the site from the charity's entry on the Register of Charities.

Your current charity website - P No website address provided.

A13 - CHARITY MAIN BANK/BUILDING SOCIETY ACCOUNT

Below are the current details held by the Commission about your main Bank or Building Society Account. These account details are not made public.

Bank Name -
Sort Code
Account number
Bank Account name -

DATA PROTECTION

Any information you give to us will be held securely and in accordance with the rules on data protection. We will treat personal details as private and confidential and safeguard them. We will not disclose them to anyone unconnected with the Charity Commission unless you have consented to their release, or in certain circumstances where:

- we are **legally** obliged to do so;
- it is **necessary** for the proper discharge of our statutory functions;
- disclosure is **necessary** to comply with our function as regulator of charities and is in the public interest.

We will ensure that any disclosure made for this purpose is proportionate, considers your right to privacy and is dealt with fairly and lawfully in accordance with the Data Protection Principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any information, whether kept in computer or paper files, about identifiable living individuals. As a 'data controller' under the Act, we must comply with its requirements.

PART B - Financial Information

The information below shows the figures you have provided to the Commission from your charity's accounts.

These answers are based on **charity only accounts**.

B1 - RESOURCES

Incoming Resources

B1.1 - Voluntary income - **P**

£ 3,661

B1.1a - Legacies - **P**

£ 0

B1.1b - Endowments received - **P**

£ 0

B1.2 - Activities for generating funds - **P**

£ 0

B1.3 - Investment income - **P**

£ 5,922

B1.4 - Incoming resources from charitable activities - **P**

£ 1,321,891

B1.5 - Other incoming resources - **P**

£ 0

B1.6 - Total incoming resources - P

£ 1,331,474

B1.7 - Revaluations of tangible fixed assets - **P**

£ 0

B1.8 - Gains/losses on investment assets - **P**

£ 0

B1.9 - Actuarial gains/losses on defined benefit pension schemes - **P**

£ 0

Resources Expended

B1.10 - Costs of generating voluntary income - **P**

£ 0

B1.11 - Fundraising trading costs - **P**

£ 0

B1.12 - Investment management costs - **P**

£ 0

B1.13 - Costs of charitable activities - **P**

£ 1,374,787

B1.13a - Grants to institutions - **P**

£ 0

B1.14 - Governance costs - **P**

£ 39,909

B1.15 - Other resources expended - **P**

£ 0

B1.16 - Total resources expended - P

£ 1,414,696

B1.17 - Support costs - **P**

£ 0

B1.18 - Depreciation - **P**

£ 46,200

B1.19 - Level of reserves (from TAR) - **P**

£ 63,794

B2 - ASSETS

B2.1 - Total fixed assets - P	B2.7 - Total fixed assets (at start of year) - P
£ 1,676,356	£ 1,720,334
B2.1a - Fixed asset investments - P	B2.7a - Fixed asset investments (at start of year) - P
£ 0	£ 0
B2.2 - Total current assets - P	
£ 554,332	
B2.2a - Current asset investments - P	
£ 357,842	
B2.2b - Cash - P	
£ 196,490	
B2.3 - Creditors due within one year - P	
£ 490,538	
B2.4 - Long term creditors and provisions - P	
£ 0	
	B2.8 - Endowment funds - P
	£ 0
B2.8 - Pension fund assets (liabilities) - P	B2.9 - Restricted funds - P
£ 0	£ 0
	B2.10 - Unrestricted funds - P
	£ 1,740,150
B2.6 - Total Net Assets (liabilities) - P	B2.11 - Total Funds - P
£ 1,740,150	£ 1,740,150

B3 - EMPLOYEES

B3.1 - Number of full-time equivalent employees - P 51

B4 - VOLUNTEERS (optional)

B4.1 - Number of UK volunteers - P 2

REPORTING SERIOUS INCIDENTS

Incidents that cause a significant loss of funds or pose serious risks to a charity's beneficiaries, resources or reputation should be reported to the Commission as soon as possible.

If any of the serious incidents listed below have occurred since your last return, you should notify the Commission immediately if you have not already done so.

SERIOUS INCIDENTS

- Significant fraud or theft or loss of funds
- Significant sums of money or other property donated to the charity from an unknown or unverified source
- The charity (including individual staff or trustees or both) has a known or alleged link to a proscribed organisation or to terrorist or other unlawful activities.
- A person disqualified from acting as a trustee has been or is currently acting as a trustee of the charity
- The charity does not have a policy for safeguarding its vulnerable beneficiaries (e.g. children and young people, people with disabilities and the elderly/old people).
- The charity has no vetting procedure to ensure that a trustee or member of staff is eligible to act in the position he or she is being appointed to
- Beneficiaries have been or are suspected of being abused or mistreated
- The charity has been subject to a criminal investigation or an investigation by another regulator or agency; or sanctions have been imposed or concerns raised by another regulator or agency (e.g. the Health and Safety Executive, Ofsted).

When you report a serious incident we will generally ask you for further details. You may not have all of these but please be prepared to provide as much relevant information as possible about the incident. We are mainly concerned about criminal or unlawful activity, or very serious incidents about a charity that may affect its funds, property, beneficiaries or reputation. Some of the incidents listed may not actually be criminal, but do suggest risks of potential criminal activity or other risks which, if they became reality, would cause serious harm to the charity.

LEGAL OBLIGATION

Trustees must provide information about serious incidents as part of the charity's Annual Return. Failure to do so will be regarded as a breach of legal requirements.

ADVICE FOR THE TRUSTEES AND MANAGERS OF GREENFIELDS EDUCATIONAL TRUST

The following Guidance may be useful for your trustees. To view these publications, please visit our website at www.charitycommission.gov.uk/publications. If, after reading the guidance you require assistance or feel there is a matter on which you would benefit from advice, please call Charity Commission Direct on 0845 300 0218.

Trusteeship

CC30 Finding New Trustees

A 'start to finish' guide to help charities to recruit new trustees effectively and increase the range of skills and experience on their board. **Also includes useful information on vetting trustees and the Criminal Records Bureau which may be useful to existing trustees.**

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This publication replaces the previous CC3, Responsibilities of Trustees, provides guidance to all trustees, and those who are about to become trustees, on what is involved in being a charity trustee.

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Web Guidance - Safeguarding Children

Children are an especially vulnerable group and the Charity Commission is particularly concerned to stress the importance of proper safeguards within charities for the protection of children.

Reserves

RS13 Tell it like it is

Charities are urged to remove the mystique surrounding their reserves.

Sound Governance

CC60 Hallmarks of an Effective Charity

This guidance focuses on the achievements, performance and impact of an effective charity as well as the principles which the Commission expects charities and charity trustees to adhere to.

RS6 Milestones

Looks at the issues and phases of development that are relevant to charities, also includes a checklist of standard questions for trustees to consider at various stages of development.

CC34 Collaborative Working and Mergers

Guidance on collaborative working and mergers, highlighting both good practice and the practical help we can give.

Activities

RS15 Stand and Deliver

This publication presents the results of our survey on charities delivering public services, ranging from full-cost recovery to length of funding agreements. **May be useful for charities in receipt of public funding.**

Accountancy

RS14 In Their Own Words

The report illustrates how charities have responded in the SIR form's first year.

CC14 Investment of Charitable Funds: Basic Principles

This sets out to explain briefly the powers and duties of charity trustees when investing charitable funds. It is intended to be an introduction to the subject for trustees and members of the general public who have little or no experience in this area. For those with a deeper interest or more experience of investment by charities we have published more on this site.

DECLARATION

Your Annual Return was submitted online by MRS ANGELA LOCKEY on 30 June 2008, telephone number 01342 301 268

MRS ANGELA LOCKEY certified online that:

- the information provided was correct
- it had been or would be brought to the attention of all the trustees
- that the trustees were satisfied that there are no further issues or matters that should have been brought to the attention of the Commission

Those who give answers that they know are untrue or misleading may be committing an offence.

CONTACT DETAILS

Address

The Charity Commission
PO Box 1268
Liverpool, L69 3AR

Telephone

0845 300 0218

Email

enquiries@charitycommission.gsi.gov.uk

Annual Return 2008 (Online)



GREENFIELDS EDUCATIONAL TRUST

Charity Number: 287037

Submitted on 26 June 2009

Some of the information you give in this form will become publicly available on the Register of Charities in accordance with the Charities Act 1993, as amended by the Charities Act 2006. These fields are marked - P

This form shows the information you have entered through the Annual Return 2008 Online.

The Annual Return was submitted online by MRS BEVERLEY CROFT on 26 June 2009. You do not need to send us a signed copy once the document has been submitted.

PART A - Charity Information

A1 - FINANCIAL YEAR

This Annual Return should be completed for financial years ending on or after 1st January 2008.

Financial year start - P:	01 September 2007
Financial year end - P:	31 August 2008
Next financial year end:	31 August 2009

A2 - INCOME AND EXPENDITURE

This shows your charity's income and expenditure for the financial year shown at A1. PLEASE NOTE THESE FIGURES ARE ROUNDED TO THE NEAREST POUND.

Income - P:	£1,295,835
Expenditure - P:	£1,387,350

A3 - CHARITY CONTACT

The contact details for your charity are printed below.

Your current contact is an: Individual

Title:

Personal Names:

Family Name:

Suffix:

Preferred Name - **P:**

BEVERLEY CROFT

Date of Birth:

Telephone - **P:**

01342 822189

Mobile:

Your contact details as shown on
the Register of Charities are - **P:**

BEVERLEY CROFT
GREENFIELDS SCHOOL
PRIORY ROAD
FOREST ROW
EAST SUSSEX
RH18 5JD

A4 - EMAIL FOR CHARITY COMMISSION USE

This is an address that will only be used by the Commission for contacting the charity, for example when issuing a password for our online services or for mailing reminders.

Your current email address for Commission
use:

A5 - EMAIL FOR PUBLIC DISPLAY

This is a public address that will be displayed on the Register of Charities.

Your current public email address - **P:** info@greenfieldsschool.com

A6 - CHARITY WEBSITE

If the charity has its own website and we hold the address, a hyperlink will be available for the public to access the site from the charity's entry on the Register of Charities.

Your current charity website - **P:** www.greenfieldsschool.com

A7 & A8 - CURRENT AND NEW INDIVIDUAL TRUSTEES

Printed below is the list of trustees who are individuals that we currently hold for your charity. The information supplied reflects the trustee body when the form is completed.

Please note, the addresses given should be the trustees' home address rather than a work or the charity address. Please ensure that we have a complete set of details for each trustee.

The names of any trustees with an incomplete set of details will not be recorded on our Register of Charities.

We publish only the names of trustee on the Register. We do not make other personal details publicly available. The Commission may email trustees who have given us a personal email address with important updates about trusteeship from time to time. Your charity has told us that their trustees **wish to receive these updates**.

Trustee 1

Title:

Personal Names:

Family Name:

Suffix:

Preferred Name - P:

Date of Birth:

Address:

MR PETER DAVID HODKIN

Post Code:

Telephone:

Email:

Chair of the Charity - P:

YES

Trustee 2

Title:

Personal Names:

Family Name:

Suffix:

Preferred Name - P:

Date of Birth:

Address:

MRS JENNIFER ANN SCARFE-BECKETT

Post Code:

Telephone:

Email:

Chair of the Charity - P:

NO

A9 - CORPORATE TRUSTEE

Your charity has no corporate trustees.

A10 - AREA OF OPERATION IN ENGLAND AND WALES

Shown below is the area in England and Wales that we currently hold for your charity - P.

1 EAST SUSSEX

A11 - AREA OF OPERATION OUTSIDE ENGLAND AND WALES

Your charity has not specified any countries of operation outside England and Wales.

A12 - CHARITY ACTIVITIES

Your charity has given us the following brief description of its current activities - **P**.

To establish, maintain and operate schools and other educational establishments.

A13 - CHARITY'S MAIN BANK/BUILDING SOCIETY ACCOUNT

Below are the current details we hold about your main bank or building society account. Account details are not available to the public. For security purposes we have not printed the full account number.

Bank Name:

Sort Code:

Account Number:

Bank Account Name:

A14 - CHARITY CLASSIFICATION

Printed below are the details we currently hold for your charity.

WHAT your charity sets out to do - **P**:

	101 General Charitable Purposes
✓	102 Education/Training
	103 Medical/Health/Sickness
	104 Disability
	105 Relief of Poverty
	106 Overseas aid/Famine relief
	107 Accommodation/Housing
	108 Religious activities
	109 Arts/culture
	110 Sport/recreation
	111 Animals
	112 Environment/Conservation/Heritage
	113 Economic/Community development/Employment
	114 Other charitable purposes

WHO your charity helps - **P**:

<input checked="" type="checkbox"/>	201 Children/Young people
<input type="checkbox"/>	202 Elderly/Old People
<input type="checkbox"/>	203 People with disabilities
<input type="checkbox"/>	204 People of a particular ethnic or racial origin
<input type="checkbox"/>	205 Other charities/Voluntary bodies
<input type="checkbox"/>	206 Other defined groups
<input checked="" type="checkbox"/>	207 General public/Mankind

HOW your charity operates - **P**:

<input type="checkbox"/>	301 Makes grants to individuals
<input type="checkbox"/>	302 Makes grants to organisations
<input type="checkbox"/>	303 Provides other finance
<input type="checkbox"/>	304 Provides human resources
<input type="checkbox"/>	305 Provides buildings/facilities/open space
<input checked="" type="checkbox"/>	306 Provides services
<input type="checkbox"/>	307 Provides advocacy/advice/information
<input type="checkbox"/>	308 Sponsors or undertakes research
<input type="checkbox"/>	309 Acts as umbrella or resource body
<input type="checkbox"/>	310 Other charitable activities

DATA PROTECTION

Any information you provide to us will be held securely and in accordance with the rules on data protection. Your personal details will be treated as private and confidential and safeguarded and not disclosed to anyone unconnected with the Charity Commission unless you have consented to its release, or in certain circumstances where:

- we are **legally** obliged to do so;
- disclosure is deemed by the Commission to be **necessary** for the proper discharge of our statutory functions; or
- disclosure is deemed by the Commission to be **necessary** in compliance with our function as regulator of charities; or
- disclosure to a relevant public authority is deemed by the Commission to be both a **necessary** disclosure and subject to an **overriding public interest**.

We will ensure that any disclosure made for this purpose is proportionate, considers your right to privacy and is dealt with fairly and lawfully in accordance with the Data Protection Principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any Information however stored, about identifiable living individuals. As a 'data controller' under the Act, the Charity Commission must comply with its requirements.

PART B - Financial Information

The information below shows the figures you have provided to the Commission from your charity's accounts.

These answers are based on **charity-only accounts**.

B1 - RESOURCES

Incoming resources

B1.1 Voluntary income - **P**:

£ 2,234

B1.1a Legacies - **P**:

£ 0

B1.1b Endowments received - **P**:

£ 0

B1.2 Activities for generating funds - **P**:

£ 0

B1.3 Investment income - **P**:

£ 5,262

B1.4 Incoming resources from charitable activities - **P**:

£ 1,288,339

B1.5 Other incoming resources - **P**:

£ 0

B1.6 Total incoming resources - P:

£ 1,295,835

Resources expended

B1.7 Costs of generating voluntary income - **P**:

£ 0

B1.8 Fundraising trading costs - **P**:

£ 0

B1.9 Investment management costs - **P**:

£ 0

B1.10 Costs of charitable activities - **P**:

£ 1,342,065

B1.10a Grants to institutions - **P**:

£ 0

B1.11 Governance costs - **P**:

£ 45,285

B1.12 Other resources expended - **P**:

£ 0

B1.13 Total resources expended - P:

£ 1,387,350

B2 - OTHER RECOGNISED GAINS/LOSSES

B2.1 Revaluations of tangible fixed assets - **P**: B2.3 Gains/losses on investment assets - **P**:

£ 0

£ 0

B2.2 Actuarial gains/losses on defined benefit pension schemes - **P**:

£ 0

B3 - ASSETS AND LIABILITIES

B3.1 Total fixed assets - P:	B3.7 Total fixed assets (at start of year) - P:
£ 1,638,271	£ 1,676,356
B3.1a Fixed asset investments - P:	B3.7a Fixed asset investments (at start of year) - P:
£ 0	£ 0
B3.2 Total current assets - P:	
£ 516,931	
B3.2a Current asset investments - P:	
£ 0	
B3.2b Cash - P:	
£ 0	
B3.3 Creditors due within one year - P:	B3.8 Endowment funds - P:
£ 506,567	£ 0
B3.4 Long-term creditors and provisions - P:	B3.9 Restricted funds - P:
£ 0	£ 0
B3.5 Pension fund assets/(liabilities) - P:	B3.10 Unrestricted funds - P:
£ 0	£ 1,648,635
B3.6 Total net assets/(liabilities) - P:	B3.11 Total funds - P:
£ 1,648,635	£ 1,648,635

B4 - ADDITIONAL INFORMATION

B4.1 Support costs - P:	B4.4 Number of full-time equivalent employees - P:
£ 0	40
B4.2 Depreciation charge for year - P:	B4.5 Number of UK volunteers (optional) - P:
£ 41,830	10
B4.3 Level of reserves - P:	
£ 10,364	

REPORTING SERIOUS INCIDENTS

Incidents that cause a significant loss of funds or pose serious risks to a charity's beneficiaries, resources or reputation should be reported to the Commission as soon as possible.

If any of the serious incidents listed below have occurred since your last return, you should notify the Commission immediately if you have not already done so.

SERIOUS INCIDENTS

- Significant fraud or theft or loss of funds.
- Significant sums of money or other property donated to the charity from an unknown or unverified source.
- The charity (including individual staff or trustees or both) has a known or alleged link to a proscribed organisation or to terrorist or other unlawful activities.
- A person disqualified from acting as a trustee has been or is currently acting as a trustee of the charity.
- The charity does not have a policy for safeguarding its vulnerable beneficiaries (e.g. children and young people, people with disabilities and the elderly).
- The charity has no vetting procedure to ensure that a trustee or member of staff is eligible to act in the position he or she is being appointed to.
- Beneficiaries have been or are suspected of being abused or mistreated.
- The charity has been subject to a criminal investigation or an investigation by another regulator or agency; or sanctions have been imposed or concerns raised by another regulator or agency (e.g. the Health and Safety Executive, Ofsted).

When you report a serious incident we will generally ask you for further details. You may not have all of these but please be prepared to provide as much relevant information as possible about the incident. We are mainly concerned about criminal or unlawful activity, or very serious incidents about a charity that may affect its funds, property, beneficiaries or reputation. Some of the incidents listed may not actually be criminal, but do suggest risks of potential criminal activity or other risks which, if they became reality, would cause serious harm to the charity.

LEGAL OBLIGATION

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ADVICE FOR THE TRUSTEES AND MANAGERS OF GREENFIELDS EDUCATIONAL TRUST

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A 'start to finish' guide to help charities to recruit new trustees effectively and increase the range of skills and experience on their board. **Also includes useful information on vetting trustees and the Criminal Records Bureau which may be useful to existing trustees.**

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Charities are urged to remove the mystique surrounding their reserves.

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This guidance focuses on the achievements, performance and impact of an effective charity as well as the principles which the Commission expects charities and charity trustees to adhere to.

RS6 Milestones

Looks at the issues and phases of development that are relevant to charities, also includes a checklist of standard questions for trustees to consider at various stages of development.

CC34 Collaborative Working and Mergers

Guidance on collaborative working and mergers, highlighting both good practice and the practical help we can give.

Activities

RS15 Stand and Deliver

This publication presents the results of our survey on charities delivering public services, ranging from full-cost recovery to length of funding agreements. **May be useful for charities in receipt of public funding.**

Accountancy

RS14 In Their Own Words

The report illustrates how charities have responded in the SIR form's first year.

CC14 Investment of Charitable Funds: Basic Principles

This sets out to explain briefly the powers and duties of charity trustees when investing charitable funds. It is intended to be an introduction to the subject for trustees and members of the general public who have little or no experience in this area. For those with a deeper interest or more experience of investment by charities we have published more on this site.

DECLARATION

Your Annual Return was submitted online by MRS BEVERLEY CROFT on 26 June 2009, telephone number 01342828267.

MRS BEVERLEY CROFT certified online that:

- the information provided was correct
- it had been or would be brought to the attention of all the trustees
- that the trustees were satisfied that there are no serious incidents or other matters which they should have brought to the attention of the Commission and had not done so already.

Those who give answers that they know are untrue or misleading may be committing an offence.

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