

South Wilts Grammar School
(A Company Limited by Guarantee)
Annual Report and Financial Statements
Year ended 31 August 2025

Company Registration Number:
07451741 (England and Wales)

South Wilts Grammar School

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South Wilts Grammar School

Reference and Administrative Details

Members

Mrs Helen Stewart

Mr Edward Richards

Mrs Hilary Angel

Mr Nigel Anstey (resigned 1 September 2025)

Mrs Janette Field

Trustees

Mr William Davies*

Mr Nicholas Lay* (Vice Chair)

Mr Robert Macdonald*

Ms Efrim Niccals

Mrs Elizabeth Ogilvie* (Chair)

Mr John Oldroyd

Mrs Lillie Robinson (appointed 18 December 2024)

Dr Amanda Smith* (Accounting Officer) (appointed 1 September 2024)

Mrs Caroline Smith (appointed 22 November 2024)

Mr Andrew Welfare*

Mrs Alma Goodall (Vice Chair) (resigned 31 August 2025)

Mrs Sharon Hackett (Staff Governor) (resigned 7 November 2025)

Mrs Emma Licciardi (resigned 7 October 2024)

Mr Howard Prince* (resigned 31 December 2024)

Mrs Alex Raworth* (Staff Governor) (resigned 7 November 2025)

* member of the Resources Committee

Company Secretary

Mrs Rebecca Watts

Senior Management Team

Dr Amanda Smith, Headteacher

Mrs Rebecca Watts, Business Manager

Ms Jill Bellamy, Deputy Head

Mr Jake Lean, Deputy Head

Mr Stephen Jones, Assistant Head

Mrs Amy McGuinness, Assistant Head

Mrs Leah Redding, HR Manager

Company Name

South Wilts Grammar School

South Wilts Grammar School

Reference and Administrative Details

Principal and Registered Office
Stratford Road
Salisbury
Wiltshire
SP1 3JJ

Company Registration Number
07451741 (England and Wales)

Independent Auditor
Hopper Williams & Bell Limited
Statutory Auditor
Highland House
Mayflower Close
Chandlers Ford
Eastleigh
Hampshire
SO53 4AR

Bankers
Lloyds Bank Plc
38 Blue Boar Row
Salisbury
Wiltshire
SP1 1DB

Virgin Money
Jubilee House
Gosforth
Newcastle upon Tyne
NE3 4PL

Nationwide Building Society
Kings Park Road
Moulton Park Northampton
NN3 6NW

Solicitors
Stone King
13 Queen Square
Bath
BA1 2HJ

Wilsons Solicitors LLP
1 St John's Street
Salisbury
SP1 2SB

South Wilts Grammar School

Trustees' Report

The Trustees present their annual report together with the financial statements and auditor's report of the charitable company for the year ended 31 August 2025. The annual report serves the purposes of both a Trustees' report, and a Directors' report under company law.

The Academy Trust operates an academy for pupils aged 11 to 18 serving a catchment area in and around Salisbury. It has a pupil net capacity of 1200 and had a roll of 1183 in 2024/25.

Structure, Governance and Management

Constitution

The Academy Trust is a company limited by guarantee and an exempt charity. The charitable company's memorandum and articles of association are the primary governing documents of the Academy Trust. The Trustees of South Wilts Grammar School are also the directors of the charitable company for the purposes of company law. The charitable company operates as South Wilts Grammar School.

Details of the Trustees who served during the year and to the date these accounts are approved are included in the Reference and Administrative Details on page 1.

Members' Liability

Each Member of the charitable company undertakes to contribute to the assets of the charitable company in the event of it being wound up while they are a Member, or within one year after they cease to be a Member, such amount as may be required, not exceeding £10, for the debts and liabilities contracted before they ceased to be a Member.

Trustees' Indemnities

The Academy has taken out appropriate indemnity insurance to protect the Trustees' interests.

Method of Recruitment and Appointment or Election of Trustees

The number of Trustees serving at any time shall not be subjected to any maximum. The Members can appoint up to 13 Trustees. A minimum of five Parent Trustees must be appointed. In appointing a Parent Trustee, the Trustee Board shall appoint a person who is a parent of a pupil registered at the Academy. Any election of Parent Trustee which is contested will be held by secret ballot. The Staff Trustees, of which there are three, one being the Headteacher. The Trustees may appoint any number of co-opted Trustees. The term of office of any trustee is four years. A skills audit is undertaken in the spring term of each academic year and a report given to the Steering Group in the summer term, focusing on any recruitment drives for the new year. If required, letters are sent out to targeted local companies inviting staff to join the Trustee Board as co-opted trustees. Interviews are held by the Chair of Trustees to identify suitability, and candidates are then proposed to the main Board. When Parent Trustees vacancies occur, parents are advised by letter and informed of areas of expertise that would be helpful to the Trustee Board.

South Wilts Grammar School

Trustees' Report

Policies and Procedures Adopted for the Induction and Training of Trustees

All new Trustees will meet with the Chair of Trustees as part of their induction. They are supported through provision of the Trustee Governance Handbook, new trustee training as provided by Wiltshire Governors' Service, Governor Hub and supported by their relevant Committee Chair. All Trustees are given the school Safeguarding Handbook and additional specialist training is sought for Trustees with specific responsibilities linking to child protection and special educational needs. Trustees are kept updated with changes in education through subscriptions to the National Governors' Association, Governor Hub, the National College and Wiltshire Governor Services.

Organisational Structure

The Full Board of Trustees meets four times a year, 1 per term plus the September business meeting. Certain aspects of the company's business are delegated to the following committees on which the Headteacher and the Chair of Trustees also sit. The School Business Manager and members of the Senior Leadership Team also attend committees, as appropriate.

The Resources, Audit and People Committee meets six times during an academic year and oversees any matters relating to financial procedures and systems of control, financial matters, health and safety, maintenance of the school site and fabric of the school and staffing. The Chair of the Education and Experience Committee also attend these meetings in a non-voting capacity.

The Education and Experience Committee meets five times during an academic year and oversees curriculum, achievement, assessment and pastoral issues.

Trustee leaders meet regularly with the Headteacher and the Governance Professional to oversee agenda and update priorities needing to be addressed.

An annual strategic meeting is also held at the Academy.

Trustees delegate the day-to-day management operations of the Academy to the Headteacher. To facilitate effective operations, the Headteacher and the School Business Manager have delegated authority within terms approved by the Trustees for operational matters, including educational, finance and employment matters.

Financial oversight and review

All Trustees have received a copy of the Academy Trust Handbook and are familiar with its contents. Two Trustees hold accounting qualifications, these include FCCA and FMMT.

The Resources, Audit and People Committee agrees and monitors the Academy's budget, which is approved by the Full Trustee Board. The accounts are first presented to the Resources, Audit and People Committee, all members are invited to attend this meeting at which the final accounts are presented; the external auditors are present at this meeting. The Resources, Audit and People Committee, present their findings, to the Full Trustee Board at the AGM.

South Wilts Grammar School

Trustees' Report

Arrangements for setting pay and remuneration of key management personnel

The pay of the Headteacher is set by the Resources, Audit and People Committee of the Board of Trustees, which also reviews the pay of other staff in the school in accordance with the Pay Policy. There is a committee of two or three Trustees who undertake performance management of the Headteacher, receiving advice from the School Improvement Advisor.

Trade union facility time

Relevant union officials

Number of employees who were relevant union officials during the relevant period	Full-time equivalent employee number
2	1.6

Percentage of time spent on facility time

Percentage of time	Number of employees
0%	-
1%-50%	2
51%-99%	-
100%	-

Percentage of pay bill spent on facility time

Total cost of facility time	£10,524
Total pay bill	£6,224,964
Percentage of the total pay bill spent on facility time	0.18

Paid trade union activities

Time spent on paid trade union activities as a percentage of total paid facility time hours	-
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Related Parties and other Connected Charities and Organisations

SWGS forms part of the South West Academic Trust (SWAT) which is a partnership of eleven grammar schools in the South West region and Exeter University.

South Wilts Grammar School

Trustees' Report

Objectives and Activities

Objects, Aims and Activities

SWGS is a grammar school with 1,183 students on roll in January 2025, aged 11–19. The main school (11–16) is girls-only, with entry via the 11+, and the sixth form has been co-educational since 2020. SWGS opened in 1927 under the original Grammar School programme after being originally combined with Bishop Wordsworth's School. It became a Single-school Academy Trust (SAT) in January 2011. The current Headteacher was appointed in 2024 after 4 years at Poole Grammar School as Headteacher, and previously Deputy Headteacher at SWGS. The two Deputy Headteachers were appointed in 2023 and 2024 respectively. There are also 2 Assistant Headteachers and 3 Associate Assistant headteachers, the latter of which were appointed in 2023. There is also a new Chair of the Trustees since September 2024.

SWGS is an above average sized 11-19 provider and is in a period of rapid growth with regards to sixth form (increase from 180 – 228 in Year 12). Most students come from White British backgrounds (70%). The proportion of students who have SEN (9% 2024/25) or FSM (3% 2024/25) are well below the national average with EAL (9% 2024; 7% in 6th Form) being close to the national average. Stability is very high and well above the national average (96% 2024/25). We are awaiting an updated IDSR (due Jan 2026). SWGS serves the area of Southern Wiltshire and has students from Southampton and Basingstoke who travel to school via train, with 50% of students arriving on public transport necessitating most enrichment opportunities taking place within the hour lunch period and impacting 'late' arrivals.

The school employs 7 members of management, 75 teachers and 63 support staff, with 80% of the teaching staff on the Upper Pay Scale (UPS). There are 24 ad hoc staff, such as invigilators, 25 self-employed professionals, including careers advisors, counsellors, and peripatetic staff, as well as 20 contractors, covering roles such as cleaning and catering. The school benefits from experienced heads of department, alongside three early career teachers – all in their first year of the ECF. Teachers at the school deliver lessons within their subject specialism, ensuring high-quality education.

SWGS was judged by Ofsted in January 2025 as an excellent school, with inspectors noting a culture of ambition, kindness, and exceptional academic outcomes. They praised the school's broad and intellectually rich curriculum, alongside its vibrant sixth form and wide subject offer. Behaviour and attitudes were described as exemplary, with pupils showing deep respect, intellectual curiosity, and pride in belonging to the SWGS community.

1. Our vision

“Success, Wellbeing, Growth and Service”

We will enable all students to achieve SUCCESS in their education and future lives and to support, protect and develop their physical and mental WELLBEING.

We will skilfully develop GROWTH in students' academic learning and personal skills thus preparing them for life's opportunities and challenges and enabling them to SERVE their communities in their own unique way.

South Wilts Grammar School

Trustees' Report

Objects and Aims

2. Our values

Our motto 'Onwards' is reflected in our values of BE KIND, BE INVOLVED AND BE ASPIRATIONAL.

3. Golden threads

Our school's golden threads of sustainability, literacy and Equality, Diversity, and Inclusion (EDI) underpin every aspect of our vision and practice. Sustainability is embedded in our curriculum, operations, and enrichment activities, encouraging students to think critically about global challenges and take responsibility for their environmental impact. Literacy is celebrated across all key stages, with students reading widely and often; the school fosters a 'buzz' around reading and encourages intellectual curiosity through book clubs, recommendations, and academic enrichment. EDI is central to fostering a culture where all students and staff feel valued, respected, and empowered to achieve their potential, regardless of their background or circumstances. These principles are interwoven into leadership, teaching, and the school community, ensuring that they drive meaningful change and reflect our commitment to a fair and sustainable future.

As we move into the next phase of strategic development, the school continues to focus on three key priorities for the year ahead. Inclusion remains a central pillar of our work, led by JJB and JSL, with a focus on ensuring that all students, regardless of background or need, are supported to thrive academically and pastorally. Digital Strategy, under the leadership of SMJ, will continue to drive improvements in classroom technology, staff development, and student digital literacy, ensuring that our provision remains responsive and future-facing. Finally, Stakeholder Engagement, led by ACM, will strengthen communication with parents, students, alumni, and the wider community, aligning our values and ambitions through meaningful dialogue and partnership.

Public Benefit

Community groups have extensive use of the school facilities. Current users include: Salisbury Music Society, Salisbury Floral Recreation Society, Salisbury Symphony Orchestra, City of Salisbury Athletics and Running Club, Bishop Wordsworth's Grammar School, Wiltshire Council, Duke of Edinburgh Award Scheme, Downton Diamonds, REACT self-defence, Leehurst Swan School, Godolphin School, Tumble Tots, Mini Athletics Salisbury, Ashleigh's Wellbeing & Fitness, Elite Ladies Kickboxing, Elite Ladies Dance and Trinity Church. We also have close links with our feeder primary schools through our Primary Outreach programme.

In setting our objectives and planning our activities the Trustees have carefully considered the Charity Commission's general guidance on public benefit.

South Wilts Grammar School

Trustees' Report

Strategic Report

Achievements and Performance

In 2024-25 there were 1,185 students on roll, with 387 in the sixth form. The number of students on roll, post-16 continues to increase and remain high, with a current Year 13 cohort of 230 students and Year 12 at 183 on roll. There was a renewed focus on ensuring that all entry requirements to the sixth form were met before an offer of a place or a subject was made for the current Year 12.

The students excelled at GCSE with 57.4% awarded grades 8 to 9, 78.4% of all grades awarded 7 to 9 and 98.0% of the results achieved graded 5 to 9. A total of 1,569 GCSEs were taken. 155 students sat GCSE qualifications, with one student registered as dual role and did not sit any examinations at SWGS. In 2025, 99.4% of students attained a strong pass (grades 5 to 9) in English and maths. The school's unvalidated Progress 8 is 1.29 for 2025 and Attainment 8 is 77.36 for 2025. This constitutes the best set of GCSE results the school has had in living memory.

The A Level results continue to be outstanding, with 473 qualifications awarded. 35.7% of all grades awarded were A* to A. 67.0% of all grades awarded were A* to B grades and 98.9% of all grades were A* to E. 157 students sat A-Level examinations this year, with 51 boys and 106 girls. 37 students achieved AAB or higher in at least two facilitating subjects. The school's unvalidated Level 3 Valued Added (L3VA) is 0.36 for 2025. This constitutes the best set of A Level results the school has had in living memory.

Our Year 13 students are embarking on the next stage of their journeys, whether in education, employment or training. Of the 158 leavers in 2025, 80% are going into Higher Education, with 87% securing their first-choice place. Seven students received offers from Oxford or Cambridge, with six taking up their places. We are delighted that six students will be reading Medicine, two Veterinary Medicine and two Dentistry. Top university destinations this year include Cardiff, Exeter, Bristol, Bath, Durham, Southampton and London universities (including UCL, LSE, Queen Mary, Royal Veterinary College and Holloway). Six students have gained apprenticeships, one student is going to a Conservatoire to study Professional Dance and Musical Theatre, and one student is beginning an Arts Foundation course.

Enrichment and extra-curricular

Duke of Edinburgh

Over 550 SWGS students are currently enrolled on the Duke of Edinburgh Award, with 85% of Y9 taking part in the Bronze Award, 40% of Y10 in the Silver Award, and 32% Y12 students taking part in the Gold Award last year. Between them they completed 3146 hours (an estimated social value of over £20,000) of volunteering in the local community, learned countless new skills, and took part in a fantastic array of physical activities.

Students completed over 500 expeditions over 13 weekends this summer, and several of our sixth formers celebrated completing their Gold Awards in the gardens of Buckingham Palace. As a result of all this hard work and commitment, an impressive 67 Bronze Awards, 56 Silver Awards and 15 Gold Awards were completed during the last academic year, with many more still working towards them.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Art

This year the Year 10s have enjoyed two trips out to experience great art. In March we went to the Hauser and Wirth Gallery in Somerset. 'An Uncommon Thread' Exhibition featured 10 contemporary artists living and working in the UK. Inspired by the work they viewed, students created sculptural pieces from clay or found materials in class. The second trip was to the V & A which has become an annual highlight. The wealth of artefacts continues to be a great source of inspiration for the development of the GCSE students' portfolios.

Our involvement in EDI art related activities has grown and developed this year. Art activities in KS3 Art Club have included making Diwali lamps and Black History inspired graphic art in the form of Pan- African and Kente patterns. On the EDI day Year 10 students were able to partake in painting rock mandalas or decorating Mehndi hands.

This year it was the turn of Years 7 and 8 to take centre stage at the Salisbury Schools Exhibition at the Young Gallery, Salisbury. On display was a range of 2D and 3D work on the theme of 'Landscape'; Klimt inspired paintings by Year 7 and clay relief landscapes inspired by Van Gogh and ceramicist Katie Smith.

Last September our Year 12 art students were again very fortunate to participate in the Stone Mason Experience at Salisbury Cathedral. We are delighted that as a result of attending this day and learning about this ancient craft, one of the students applied for and has been accepted onto a stone masonry course in Bath. In November the Year 12s attended Art in Action in London. At this event, 4 Contemporary Artists, headlined by the renowned artist Cornelia Parker, gave compelling insights to their careers followed by Q & A sessions with the students.

Lastly, we are excited to announce that the prize for 'Salisbury Young Artist of the Year' goes to Year 13 student Alyssa, currently doing Art A Level at SWGS. This competition was organised by Gallery 21 in Salisbury, aimed at encouraging the talents of young artists within the local community. GCSE and A Level artwork from 4 selected local schools featured in an exhibition at the gallery from 26 October - 2 November. Alyssa's winning entry, 'My 2 year old could have painted that', was judged the winner and Alyssa received a beautiful glass trophy from the mayor and £100 worth of art materials for this award.

Business & Economics

It's been a dynamic and enriching year for the Business and Economics department, filled with exciting opportunities and real-world learning experiences for our students.

Year 13 Economics – A Visit to the Heart of Democracy

- In November, our Year 13 Economics students visited the Houses of Parliament. They enjoyed a guided tour of both the House of Commons and the House of Lords, followed by an insightful Q&A session with a member of the House of Lords, who shared valuable perspectives on his role and the workings of government.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Year 12 Economics – Exploring the Financial and Political Landscape

- June saw our Year 12 Economics students embark on a dual visit to the Bank of England and the Houses of Parliament. During their time in Westminster, they met with our local MP, John Glen, and even spotted several high-profile politicians, including former Prime Minister David Cameron.

Year 12 Business – Young Enterprise in Action

- Our Year 12 Business students took part in the SWGS Young Enterprise programme, where they launched a social enterprise focused on selling patterned socks. The team introduced themed ranges for events such as Christmas and Valentine's Day, and successfully raised over £350 for the Stars Appeal at Salisbury Hospital through their sales.

Year 9 Enterprise Event – Innovation in Action

- The department also hosted the annual Year 9 Enterprise Event, a three-day challenge involving 15 local companies. Each company set a real-world business challenge for student teams to tackle. The event culminated in student presentations to the companies, with feedback described as exceptional across the board.

Computer Science

Students in Year 8 through to Year 13 took part in a number of national competitions, with Year 8s coming second in the region in the Cyber First Competition and a Year 13 team winning a challenge in the South West Cyber Security Competition final held at UWE in Bristol. Year 7s undertook the Cyber Trailblazers and Cyber Adventurers program.

Year 12 students all undertook 12 hours of virtual placement with DSTL involving a project analysing drone flight data. Students presented their work to staff at DSTL at the end of the project. SWGS hosted again the interschool Year 10 challenge day (Godolphin, Trafalgar, and Wyvern St Eds students took part). On the same day SWGS hosted at CyberFirst Networking event inviting local employers to volunteer and engage with school projects relating to the sector.

Further funding from DSTL enabled the purchase of a second 80inch interactive screen for our computer suites. Going forward we are attending the AI Christmas Lecture in Bristol and have been partnered with an AI Ambassador, Year 12s will be attending an unlock cyber careers event at UWE and a drone flying demonstration on the school playing field will be taking place in December. There is also some very, very exciting news to come from the department in December but at the moment, this is TOP SECRET information. Watch this space!

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Drama

Whole School Production - The Little Mermaid

Of course, our top highlight of the year was our whole school production of Disney's The Little Mermaid, which involved over 160 students in the cast, crew and orchestra. When I started working on this in May 2024, I had no idea of the journey this project would take: the exceptional talent that we would be able to showcase, the friendships that would be forged backstage, the disasters and setbacks, the show stealing cat with his impeccable timing, the sheer amount of bubble guns we would require ("If less is more, think how much more, more would be."), the many individual students who would really step up and take on huge amounts of responsibilities.

Drama Clubs

Our KS3 Drama Club has flourished this year with a highly successful festive performance in December: Christmas Around The World. This year, linking to our school's golden strand of EDI, the students chose to research how Christmas is celebrated in different cultures across the globe and produced a thoughtful and creative piece travelling around multiple countries to show this in different scenes.

When not all-consumed by the whole school production, the SWGS Theatre Company worked hard on a Theatre-in-Education project, devising a piece for Year 7s. This year, the Company are currently working on a commission from SLT to create a piece of TIE on the themes of on-line safety and AI.

Summer Soiree

This year, the Lecture Theatre was incredibly well attended for our Drama Showcase at the Summer Soiree and it was such a lovely opportunity to share students' work from across all year groups – from the magical mayhem of Year 7 Drama Club's rendition of A Midsummer Night's Dream inspired fairy tale (featuring the Year 12 prefects on lighting, sound and Kitty as our understudy 'Wolf!'), to an incredibly poignant and sensitive Year 12 duologue from The Children's Hour, by Lillian Hellman, performed beautifully in the style of Stanislavski by Katie and Holly-Rose. The evening culminated in a brilliant musicals mash-up dance by 9W that brought us all huge amounts of joy.

Workshops

We were delighted to welcome back Vamos Theatre Company to work with our Year 8 students during Activities Week again this year. Vamos are a full masked theatre company that believe "full mask theatre taps directly into the power of empathy and encourages awareness of our shared human experiences in an increasingly isolating world". The students really rose to the challenge of mask work and impressed with their ability to shift their physicality and mannerisms to bring the masks to life. As part of the workshop, they also had the opportunity to watch a screening of Vamos' current production, Boy on the Roof, and consider themes of ADHD, loneliness and connection.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Drama Trips

We have been privileged to see some incredible live theatre this year. One of the standout productions has to be our A-Level trip to see Hadestown in London. With Anais Mitchell's stunning score, this political love story transposed the ancient Greek myths of Orpheus and Eurydice, Hades and Persephone to an industrialised wasteland (and a touch of New Orleans 1930s jazz bar), drawing upon pertinent contemporary themes of migration and the climate crisis and forcing the audience to consider what the world could be. The set design (by Rachel Hawk) was so stunning, that it quite literally made the audience gasp out loud.

This year, the exam students also saw Wiltshire Creative's hilarious and energetic production of The 39 Steps (the Detectives with the lamppost and the falling sheep, definitely being everyone's highlight!), as well as the visually spectacular UK tour of Aladdin at The Mayflower in Southampton. I'm not sure any musical number will ever beat Friend Like Me!

In addition, we also took the whole of Year 7 to see Wiltshire Creative's brilliant Pantomime of Sleeping Beauty, to support their learning of Commedia d'elle arte and the Pantomime genre. Perhaps slightly worryingly, their favourite character by far was the villain, 'Fairy Badflick', but they also loved the Dame and clearly took much inspiration from these characters when they produced their own pantomimes in class.

English

Our Public Speaking, Debate and Performing Shakespeare clubs continue to see successes this year, where students reached semi-finals and area finals in ESU Public Speaking, Rotary Public Speaking, the ESU Mace Debate and the Oxford Schools Debate. Our ESU public speakers received special commendations from the judges, with one speaker described as 'phenomenal'! Students entered several competitions this year, from poetry and creative writing to the UK Linguistics Olympiad, receiving bronze certificates for their entries and publication of their works. Our Key Stage 5 mentors have been exceptional in supporting Key Stage 4 students in our drop-in sessions, and trips to the RSC in Stratford for a performance of Hamlet, and to the EMC's Language Conference in London have been highlights for our sixth form students.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Geography

The Geography department has run a number of trips and fieldwork opportunities for students across all key stages. The Year 7s were introduced to some basic fieldwork techniques whilst visiting Lulworth Cove and Durdle Door during activities week. Also during activities week, the Year 8 geographers investigated what makes a successful tourist attraction. They carried this out at Longleat Safari Park whilst also exploring animals from some of the amazing places around the world they had studied that year. The GCSE geographers were able to carry out their physical geography enquiry (coastal processes and landforms) at Hengistbury Head and their human geography enquiry (regeneration) at Bristol. Both were great opportunities to apply their knowledge from the classroom to the real world. Finally, the A Level geographers were offered the chance to explore two physical geography locations (Hengistbury Head and Sandbanks) whilst also being able to carry out air pollutions studies and social inequality studies within their local area. This fieldwork directly contributed to the A Level students being able to complete their NEA assessment.

History, Politics & Classics

During Activities Week, the History Department ran a cross-curricular visit to Old Sarum, where students learned about the history of the site, responded to the story of Eleanor of Aquitaine through dramatic performance and built trebuchets to recreate medieval warfare. The Department led Year 10 GCSE students on a trip to Belgium and France, to visit sites connected with the First World War. They visited Talbot House, Wellington Quarry and Beaumont Hamel as well as WW1 cemeteries at Langemark and Tyne Cot. Students attended the moving Last Post ceremony at the Menin Gate, where they laid a wreath to commemorate the missing of the Ypres Salient. Y13 History and Politics students took part in a trip to Washington DC. They engaged in museum visits linked to their year 12 paper on America in the 20th century. They also visited important political institutions like the Supreme Court and the United States Capitol. A highlight was their work with Episcopal High School in Alexandria where they visited Freedom House (a site where enslaved people were traded) and engaged with students on their project researching the history of the school's links with slavery. Politics students were given the opportunity to visit the Bank of England and the House of Commons, in a joint trip with Business and Economics. Students from a range of disciplines across year 12 took part in enrichment activities that allowed them to pursue their interests, producing projects on the Vikings and Ancient Greece among others.

Maths

We have continued to offer the UKMT Maths Challenges to a high proportion of students throughout the school. This year we were able to enter all Year 7&8 students into the Junior Maths Challenge in May. Across the two year groups we gained 16 gold certificates, 65 silver certificates and 104 bronze certificates, with 5 Year 8 students being invited to participate in the Kangaroo follow-on round. The Intermediate Maths Challenge we had 185 students who took part. This year we were able to invite some of 9A1 Maths set to take part as well as Year 10&11 students. In all we gained 30 gold certificates, 57 silver certificates and 53 bronze certificates, with 20 students being invited to take part in the two Kangaroo follow-on rounds. The Senior Maths Challenge took place at the start of October 2024. In all we had 84 students participate and gained 6 gold certificates, 18 silver certificates and 31 bronze certificates, with 7 going through to the Kangaroo. A total of 380 certificates!

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

We have continued to support Harnham Primary school to take part in the JMC and are hoping to roll this out to more primary schools this year through the Maths Primary Outreach programme. We took part in the University of Southampton Maths Challenges for Yrs 7-10, with one student gaining a certificate for her solutions. We continue to take part in the annual University of Southampton Cipher Challenge.

Modern Foreign Languages (MFL)

In MFL, students in KS5 were again offered the opportunity to take part in the Linguistics Olympiad at Advanced level. Year 7 entered the French and German Foreign Languages Spelling Bee and Year 9 students took part in the national Translation Bee competition. In both competitions, all three students reached the National Final in Cambridge, and one of the Year 7 students won the National Spelling Bee final for German! We also ran a Languages and Culture Society. The department offered a Year 10 and Year 13 trip to Normandy for French students in November, and a Year 10 and Year 12 trip to Hellenthal for German students. Spanish has been introduced into our Key Stage 3 MFL curriculum.

Music

The department had another hugely successful year with even higher participation levels, including 371 peripatetic music lessons taking place each week. The A Cappella choir came under the new leadership of Helen Timperley. With changes to the timings and appeal of the choir to better suit our students, the choir enjoyed the highest number of members since Covid and impressive performances in a variety of venues. The year the Summer Soirée expanded further to six stages, with over 100 soloists plus performances from the English and Drama departments. Primary outreach took place in the form of a showcase to students in the SWGS Main Hall, where they enjoyed interactive performances from choirs and instrumental ensembles. Towards the end of the year we launched a new Rock/Pop programme which matches students by instrument, age and ability forming different bands which then rehearse under the guidance of a specialist tutor – we look forward to seeing the results of this in concerts soon.

Physical Education

SWGS students continue to do our school proud in many sporting activities. The three school values of Be Involved, Be Kind and Be Aspirational can be seen every single day in P.E lessons, lunchtime training sessions and in all the participation and performance opportunities that all students at SWGS can choose to engage in. So many students are involved in health and well-being activities, growing in confidence and enjoying the friendships, teamwork and camaraderie that sport can bring.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Our end of year sports assemblies really highlighted just how many students have participated and performed in sporting activities this year, as the following were awarded:

Progress and Dedication awards	
Activity	Number of students
Cross Country	12
Netball	80
Football	76
Badminton	28
Rugby	9
Dance	9
Athletics	29
Tennis	36
Cricket	60

Activity	Half Colours	Full Colours
Cross Country	10	12
Netball	16	18
Football	17	
Badminton	6	
Athletics	22	3
Tennis	6	5
Cricket	10	

Many more students also got involved in the interhouse netball, football, cricket, volleyball and dance competitions, with all forms being represented, as well as the staff vs sixth form events that brought a lot of smiles to faces! Many students also dip in and out of lunchtime clubs and therefore haven't received the dedication awards, however they are always welcome to join us when they can!

Cross Country:

- In Years 9 and 10, Elara, Esme, Rose, Olivia, Magena and Yasmin qualified for the Nationals.
- In the English Schools Cup Competition our Senior Girls team qualified for the Nationals, achieving 6th place in the country. Our Inter girls also qualified for the Nationals, achieving 7th place in the country.
- Our Inter Girls team won the Bryanston Relay competition.
- Our Senior Girls team won Silver in the Salisbury races, all other year groups won Gold. In Year 12 Sophie won Gold. In the Year 9 races against local schools, Elara won Gold and Rose Silver. In the Year 7 races, Naomi won Silver and India Bronze.
- Our Senior Boys and Senior Girls teams entered the Wiltshire Schools Competition. Sophie Warner in Year 12 won Gold, and the team won overall Silver, qualifying for Regionals. Sophie also went on to qualify and compete in the Nationals.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Netball:

- Our U14 and U16 teams were Silver medallists at the Wiltshire County tournament which resulted in both teams representing Wiltshire Schools at the Southwest Regionals.
- The U15 A team are Southwest Regional State School finalists
- The Year 7,8,9+10 teams were all Salisbury Schools winners
- The Yr 8 team won Silver in the PGL tournament.
- Yr 9 won Gold in the PGL tournament.

Football:

- Our U16 Team are Wiltshire Cup champions and undefeated throughout the season, scoring over 50 goals this season and only conceding 8.
- Our Year 7 came 3rd in the 5-a-side Salisbury Schools tournament
- The Year 7 team are undefeated in their friendly matches across the season
- The U18 boys competed in the Wiltshire Cup and the Burgate 7s tournament this year

Badminton:

- The KS3 team are County champions and came 3rd at the South West Regional finals at Bath University
- The U14 and U16 Cup teams got through to the 4thround of the Schools Cup competition

Tennis:

- Our Senior Girls are LTA South-West Regional champions
- The Yr 7&8 Division 1 tennis team have qualified for the knock-out stages of the LTA Youth Schools competitions
- The Yr 7&8 Division 2 tennis team won their league in the LTA Youth Schools competitions
- The Yr 9&10 Division 2 tennis team won their league in the LTA Youth Schools competitions
- The Yr 7&8 tennis teams won the Salisbury District secondary schools tournament
- We entered the Road to Wimbledon Competition for the first time with our U14s. Well done Eloise and Georgina on 1st and 2nd place. Congratulations to Jiselle and Evie in yr 11 &12 who won the regionals and who will be going through to Wimbledon!

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Athletics:

- SWGS won all three age categories at Area Sports
- The Inter Girls team won the Wiltshire round of the ESAA Track and Field Cup and progressed to the regional finals
- 31 athletes were selected for Salisbury Schools at the County championships
- Maggie, Yasmin and Libby were selected for Wiltshire to compete in the ESAA Regional South - West championships in Exeter.
- Yasmin in Yr 10 was selected for Wiltshire in the high jump for the English Schools Athletics championships. She also qualified for the Nationals in Birmingham.
- Sophie yr 8 was selected for Wiltshire to compete in the South -West Combined events championships.
- SWGS Year 7 Super 8s team qualified for the School Games finals and won Bronze medals

Cricket:

- The U13 team made the semi-finals of the Wiltshire County cup competition
- The U15 team were runners up in the Wiltshire County Cup competition

Sports Leaders Level 1 & 2 2025

Well done to the 71 Yr 10 students who completed their Sports Leaders Level 1 qualification and also our 18 Yr 12 sports leaders who completed their Level 2 qualification this year. They have delivered inspiring sessions to Yr 7's and 8's as well as planning and leading interhouse netball, cricket and football competitions. They have also helped at the primary school's hockey and tennis festivals as well as Super 8 athletics and the Salisbury Secondary Schools tennis tournament.

Sports Day 2025

SWGS students entered into Sports Day with enthusiasm and determination once again this year. All athletes were cheered; the crowd gave some spectacular dance performances to the music and the staff relays rounded the day off with style!

The overall results were:

- 1st Place Bourne with 1,050pts
- 2nd Place Wylde with 1,025pts
- 3rd Avon with 1,000pts
- 4th Nadder with 994pts
- 5th Ebble with 895pts

The P.E. department are so proud of and thankful for all our students who show commitment, effort and enthusiasm in training sessions as well as the many students who represent us so brilliantly in the many fixtures, competitions and tournaments that take place throughout the year.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

As you can see from the summary of our target sports, the standard of competitive sport is extremely high, but we are also delighted with the participation numbers across all sports activities. It has been great this year to see the introduction and development of sixth form rugby and hockey, the new initiative of a recreational multi sports club and Gaelic Football, all run by student volunteers and staff outside of the P.E department. We encourage all our students to continue to get involved, enjoy their physical activity and be inspired by the amazing achievements and success that SWGS students keep on producing.

Sport Prefects

We are a small department and therefore hugely appreciate all the help from our Prefect team and willing volunteers who help out at lunchtime clubs, interhouse competitions and act as role models for our younger year students.

Huge thanks to our Sports Captain Toby and the prefect team: Emilie, Evie, Flora, Georgie, Jiselle, Kitty, Maddie, Rosie, Sophie, Annu and Alice. A special mention must go to Jake, Lucy, Tilly, Jess and Neve who have given up a lot of their lunchtimes and taken on a lot of responsibility helping with netball, dance, cricket and multi-sport teams this year.

Special Mentions

Thank you so much to Mr Butt for all his amazing work with our cross-country runners, Simon for his time and hard work with badminton players, Victoria Park tennis coaches for their work with our tennis players and allowing us to use their courts for training sessions and matches, JK for his work with sixth form rugby and Chloe Ashton (ex student) for her time spent in the department this year.

Departmental Support

The P.E department would like to say a huge thank you to our support staff who help with all the administration that enables our fixtures and trips to take place, particularly Mrs Stewart, Mrs Mears and Mrs Peska. Also, a big thank you to Mr Badge and Mr Carter for all their help with facilities and equipment.

Psychology

Young Researcher Programme January-June 2025

We have now seen our third cohort through The Young Researcher Programme. This year, five enthusiastic Year 12 Psychology students participated in an exciting initiative designed to immerse students in the world of real scientific research.

Following a hugely successful pilot year in 2023, in which South Wilts proudly became the first school to take part, the programme has now grown to include five schools from across the South of England. Students came together at Winchester University to collaborate, learn, and lead on real psychological research projects.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Running from January through June, the 2025 cohort took on the challenge of designing, conducting, and analysing two original psychological studies. After receiving expert training in ethical research methods, students explored fascinating questions with real-world relevance.

In their first study, the team investigated how people notice crime in everyday life, showing participants a video of a bag theft in a busy crowd. They measured attention levels to understand how aware people are of such events. Some students were asked to watch for a theft, whilst others were given a distraction task whilst watching the video — there were intriguing results. Participants who were in the witness condition most often reported seeing the theft (87%) Participants in the inattentive blindness condition least often saw the theft (15%). This is incredibly important in our understanding of attention and eyewitness testimony – it demonstrates how poor our memory is for details of a crime when we aren't paying attention and in everyday life we do not sit and wait for a crime to unfold!

The second project delved into mental health influencers, investigating whether young people prefer seeking mental health support from influencers with professional qualifications or lived experience. Young people did not perceive there to be significant differences in trustworthiness or expertise between influencers speaking from lived experience of mental health and those with professional qualifications. Students liked some influencers speaking from lived experience significantly more than those with professional qualifications and this contributed to differences in credibility overall.

After collecting their data, students returned to the University of Winchester for hands-on training in professional data analysis and scientific report writing — gaining valuable skills rarely encountered at A-level. To mark the completion of the programme, Dr Liam Satchell, Senior Lecturer in Psychology, visited South Wilts in July to award the students their YRP certificates and celebrate their achievements. We hope to continue this programme in the future.

Shepton Mallet Prison February 2025

Year 13 Psychology students took learning to the next level with a trip to Shepton Mallet Prison – the oldest prison in the UK, dating all the way back to 1625! Not only steeped in history, this eerie location also holds the title of the most haunted prison in Europe, adding an unforgettable twist to their immersive experience.

In a heart-racing challenge, students were locked inside real prison cells and tasked with escaping under timed conditions – some even faced the added difficulty of being handcuffed and left in total darkness! It was a true test of teamwork, critical thinking, and nerves of steel. Out of ten groups, four successfully cracked the code and made their escape before time ran out!

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

The excitement didn't stop there – students were taken on an eye-opening guided tour led by expert prison guides who brought the grim realities of historical prison life vividly to life. From tales of infamous inmates to the chilling conditions they endured, the tour gave students a powerful perspective on the psychological impacts of incarceration.

Throughout the day, students were able to explore key themes from their Aggression in Prisons topic, asking insightful questions and gaining real-world context to deepen their understanding of the curriculum.

Visit from Head of Curriculum at AQA February 2025

On 3 February, the SWGS Psychology Department was delighted to welcome the Head of the Psychology Curriculum at AQA. The visit provided an opportunity to observe the delivery of the curriculum in real time across both Year 12 and Year 13 classes.

The day included classroom observations, conversations with students about their experiences of the course, and a chance to see how the department provides feedback following extended questions and summative assessments. It also offered a valuable space to share best practice and discuss the upcoming changes to the curriculum, set to take effect from September 2025.

Project Re-make March 2025

We were absolutely thrilled to welcome Drew and Harry from Project Remake back to South Wilts today for a truly inspiring session with our Sixth Form students. Project Remake is an incredible entrepreneurship programme dedicated to empowering previously incarcerated individuals by equipping them with vital business skills and a fresh start.

Harry, a passionate Trustee of the programme, and Drew, a remarkable graduate of Project Remake, shared their powerful journeys with us. Drew opened up about his life before, during, and after spending over 20 years inside a US prison—a story of resilience that left everyone captivated. Today, Drew is not only pursuing a Law degree at university with ambitions to become a solicitor, but he also runs a business dedicated to supporting other ex-offenders on their own paths to rehabilitation.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Our students were deeply moved. One reflected, "Thank you so much for such an interesting talk. Drew, you were so engaging, funny, and invigorating to listen to. I really appreciated how down to earth and raw you were with us—it was such a unique and powerful insight." Another said, "Drew's mindset is truly inspirational. To endure 27 years in prison and emerge with such positivity, while helping others even during his sentence, is incredible. And Harry's dedication to turning his passion for rehabilitation into real action is making a genuine difference."

We are immensely grateful to Drew and Harry for sharing their stories and wisdom with our Sixth Formers. Their visit sparked meaningful conversations and hope, showing us, all that transformation is possible. We can't wait to welcome them back next year for more inspiring sessions!

Monkey World June 2025

On 20th June, Year 12 A-level Psychology students had the valuable opportunity to visit Monkey World as part of their studies on research methods. Their task was to conduct a non-participant naturalistic observation using a focal sampling technique, applying theoretical knowledge in a real-world setting. The day began with a workshop led by Ali, the school liaison officer, who provided a powerful insight into the backgrounds of the primates at the centre. Many of the animals had experienced traumatic early lives, including being victims of illegal pet smuggling, exploitation in the circus and television industries, and scientific experimentation—some of which led to serious developmental issues. During the visit, students explored the centre while observing and recording key behaviours of various primate species. This hands-on experience allowed them to practise core research methods covered during the academic year, including covert and naturalistic observation, as well as techniques for collecting and analysing quantitative data. In small groups, students developed behavioural categories, created suitable research aims, and later analysed their findings. The observations also reinforced broader psychological concepts such as attachment. Students were able to apply their knowledge of attachment theories, observing real-life examples of both secure and insecure mother-infant bonds among the primates. This deepened their understanding of the psychological consequences of early relationships, and the long-term impact of neglect or trauma.

Overall, the trip provided a meaningful and enriching experience, linking classroom learning with real-life application and enhancing students' understanding of both research methodology and developmental psychology. The weather was definitely on our side this year.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Teacher conference AQA July 2025

Mrs Briton was invited to speak at the AQA Teachers of Psychology Conference in July by the AQA Subject Lead for Psychology. In addition to delivering a presentation, she had the opportunity to hear from several outstanding speakers, including Dr Phil Baynard, who led a thought-provoking session on ethical issues in psychology, and Dr Chris Nicholson, who presented contemporary research on the psychodynamic approach.

Representing a "voice from the classroom," Mrs Briton shared her experiences with The Young Researcher Programme. Her contributions were well received, and as a result, she has been invited by a fellow presenter to lead a workshop at the Association of Psychology Teachers International Conference in 2026.

Talking therapies visit July 2025

On Thursday 3 July, the SWGS Psychology Department was pleased to welcome three members of the Talking Therapies Team. This valuable service is part of the Avon and Wiltshire Mental Health Partnership NHS Trust. During the session, the team shared insightful perspectives on their roles as Psychological Wellbeing Practitioners. They discussed what their day-to-day work entails, the key skills required, and the experience needed to enter this fulfilling career path. It was an engaging and informative event, particularly beneficial for students with an interest in psychology or careers in mental health support.

Where can Psychology Take you Event July 2025

The SWGS Psychology Department was thrilled to welcome a group of inspiring professionals from the world of Psychology to SWGS to deliver a series of fascinating talks.

Professionals included:

- SWGS alumni who has founded their own website and works for a healthcare service.
- Director of SCiP Impact Centre, Service Children's Progression Alliance and lecturer in Psychology
- Occupational psychologist that specialises in business psychology.
- These sessions offer a unique opportunity to gain real insights into careers in Psychology.

Religious Studies

Year 7 students worked on entries for NATRE's Spirited Arts Competition, an annual, national competition that receives approximately 25,000 entries every year. The results of the competition are released each November, and in November we were delighted to hear that one of our 2024 entries had been highlighted as a 'commended entry' for their art piece Scarred Ozone. Members of Years 9 to 13 were invited to take part in an initiative called The Olive Branch Award (OBA), focused on promoting peace, reconciliation and reducing prejudice in relation to the Israel-Palestine conflict. These are areas studied in GCSE RS in the ethical theme Religion, Peace and Conflict, and build on areas studied in RS at KS3. Students completed lunchtime workshops with Miss Clark to learn about the background of the conflict and some of the issues with finding a resolution to it. The student team were then given the chance to meet and have an in-person Q&A with an Israeli and a Palestinian peacebuilder, both citizens of Israel-Palestine.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Science

Student uptake of science subjects at A level and beyond is high, with 43 of our Y13 leavers embarking upon degrees directly related to science. Subjects studied cover all aspects including the core sciences, Environmental Science and applications such as Engineering and Medicine. A Level scientists continue to play a major role within the department, offering mentoring and student led clubs such as MedSoc and Engineering Society. This year we are running science-based 6th form enrichment sessions in Astronomy and Sustainability to allow more students to access science learning beyond their A level selections.

Many of our A Level students participated in the Olympiad Competitions for each core science discipline. These competitions provide a real challenge, asking students to apply their learning to unfamiliar problems. We attended lecture days for A level Biology and Chemistry students at the In Action conferences in London. Chemistry students attended a practical twilight session, 'Spectroscopy in a Suitcase' at Southampton University. Y12 Chemistry classes have been taking part in the school analyst competition run by the Royal Society of Chemistry which has further enriched their experience of practical work.

A small number of enthusiastic Biology students took part in the Homerton College Biology Challenge. Different abstract questions were set across the year, such as 'Why don't living organisms have wheels?'. The students worked in teams to develop their answers to these questions and submitted them online.

Through their creativity and exceptional scientific insights, our teams ranked 7th and 18th out of 900 applicants nationally.

Our success with the Arkwright Scholarship continued this year, with one student awarded a mentoring scholarship. This will support her throughout her KS5 and undergraduate studies, allowing her access to opportunities for work experience and within industry advice. Applications are currently open for 2026 scholars, and we have a record number of six applicants working through this rigorous process.

The outgoing Y11 cohort were the first to benefit from our increased teaching hours in Year 10 and Year 11. This enabled us to finish the courses in good time, deliver more in-depth consolidation lessons and embed more exam practice. We were pleased with the improvement in GCSE science grades and are looking to further develop our provision to continue this trend. The oversubscribed Y11 trip to the GCSE Science Live event in Bath was hugely successful and students were able to learn about exciting research into obesity, space and laughter. Brave students took on the Intermediate Physics Challenge for Year 11 and achieved a good haul of awards.

A team of students from Year 9 to 11 competed in the Top of the Bench Chemistry competition. In this competition, the students work collaboratively to complete a variety of unfamiliar practical's to develop their practical skills and teamwork. Y10 students were introduced to a range of scientific careers during our science day in July and had an insight into medical technologies during an afternoon of lectures hosted by BWS. A trip to the Natural History Museum in London and a zoom around the cosmos in the Explorer Dome finished off their year.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Sociology

This academic year A-level Sociology was delivered for the first time. The team consisted of experienced teachers with knowledge and expertise in Psychology and English Language (two psychologists and one English Language specialist). The combined pedagogical expertise and analytical backgrounds provided a strong foundation for the effective delivery of this newly introduced A-level. To support the teaching and learning of A-level Sociology we had a CPD day with the Head of AQA Sociology Curriculum in June 2025, which provided valuable professional development for all members of the team. We have made connections with a local specialist who delivers the Sociology course at a large sixth form, they have also come in a shared good practice and reviewed our marking. The department have also been signposted to a range of e-learning AQA courses and resources to further strengthen their knowledge of Sociology. Our team has also grown with two new teachers joining us in September. We currently have one class in Year 12 (25 students) and one class in Year 13 (21 students). This continued strong recruitment and retention at A-level demonstrates the positive impact of our work.

Technology

Food and Design & Technology continue to be our highest-performing GCSE subjects, with 84% of grades in Food achieving a grade 9 and 82% of grades in D&T awarded grades 8–9. Our students also continue to excel in the prestigious Design Museum Ventura national competition, which includes over 280 participating schools. Although our Year 10 team's innovative product did not make the top 10 this year, their creativity and teamwork were exceptional.

Food students also enjoyed an exciting and immersive trip to London's Brick Lane, where they explored the rich blend of food, culture, and history that defines the area. The visit offered a unique opportunity to connect culinary study with cultural roots, meeting local entrepreneurs and discovering the evolution of London's diverse food scene.

Careers focus

Annie Stephens continued as the Careers Lead until April 2025 when she took maternity leave. In her absence the careers team consists of Kirsty Nelson taking the lead on careers events, Jane Mackay offering consultancy on the strategic overview alongside her careers advisor role and Nikki Willcocks providing invaluable administration support. Both Jane Mackay and Kirsty Nelson have attended the SWAT Careers Meeting in June 2025 to share ideas and consider different approaches in schools. Jane Mackay also attended the CDI conference and is now a CDI Registered Practitioner. Kirsty Nelson also attended the CEC Careers Hub Conference. Both shared ideas and reflections following these events to continue to enhance the careers provision at SWGS.

We have continued to expand the use of Unifrog for tracking careers related activities across the school, provide subject related careers information as well as record all interactions for students to access. By using Unifrog in this way, we can provide detailed information regarding our progress with Gatsby Benchmarks. We use post event feedback to inform the careers programme for the following year. For the academic year 2024-25 we have met all of the Gatsby Benchmarks.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

All students received curriculum time for careers in PSHE with clear progression in each year. This includes an introduction to Unifrog and the Labour Market Index (LMI) in Year 7, exploring careers in Year 8, supporting post-14 and post-16 choices in Years 9 and 11, and developing CVs and Cover Letters in Year 10 for mock interviews. All students new to the school are onboarded to Unifrog when they arrive. Sixth form students have careers related lessons in PSHE including apprenticeship talks and application support, higher education choices and application support, using Unifrog to assist their research, preparation for interviews and the world of work.

A summary of events and activities to support careers at SWGS:

- Year 11 Post-16 Taster Afternoon (November 2024)
- Live Well Afternoon (November 2024/February 2025)
- Year 9 Alumni talks in PSHE (January 2025)
- Year 9 taster lessons for GCSE Options (January 2025)
- Year 10 Appren-t-fest (January 2025)
- Year 12 Post-18 Event (February 2025)
- Year 8 involvement in the Step into NHS Competition (April 2025)
- Year 8 and 9 Introduction to Apprenticeships online task (June 2025)
- Year 10 Careers Conference (July 2025)
- Year 9 Enterprise Days (July 2025)
- Year 10 Mock Interviews (July 2025)
- Year 10 students had small group meetings with Jane Mackay to give advice about specific career areas and early thoughts about post-16 choices. (July 2025)
- Year 11 students received at least 1 1:1 guidance meeting with Jane Mackay
- Year 12 and 13 students have the opportunity to meet with Jane Mackay for support and guidance with their Post-18 choices - 97% of students accessed this offering.
- Additional Careers Talks (throughout led by 6F team, individual departments, and extracurricular clubs including Eco Club and MedSoc)
- Year 12 work experience week (July 2025)

The Gatsby Benchmarks and government statutory guidance have recently been updated, placing greater emphasis on embedding careers education within the school's vision and recognising it as a whole-school responsibility. At SWGS, we are proud of our current provision, which was recognised by Ofsted as detailed and wide-ranging, with pupils receiving high-quality information about future pathways, including apprenticeships. To further strengthen our practice in light of the updated Benchmarks for 2025, we are using the CEC Careers Impact Maturity Model and Compass Evaluation Tool to celebrate existing strengths and strategically plan the next phase of development, including expanding meaningful workplace experiences for all year groups.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

CPD

This academic year has seen a strategic shift in the management and delivery of CPD. The SchoolIP platform has been discontinued as it was found to be unfit for purpose, and the school has now adopted the Approvals app within Microsoft Teams. This change not only streamlines processes but also delivers a cost saving for the school. A new approach has also been introduced, embedding CPD within all departmental and staff meetings. These sessions are aligned with the school's key priorities for the year of Inclusion, Digital Strategy, and Stakeholder Engagement. Or it focuses on subject-specific development. This activity is being captured in a new whole-school CPD Plan, which is currently being developed to provide an overview of professional learning across the year.

The school continues to support three Early Career Teachers who are completing the ECT programme through Ambition Institute, underpinned by a strengthened induction programme for all new staff. We also have two members of completing the NPQH, one completing the NPQEL and one completing the NPQ for SENDcos.

Equality Diversity and Inclusion (EDI)

Black History Month- October 2024

October is Black History Month, and on 22 October, we marked the occasion by creating a Black History Appreciation Space—a celebration of culture, creativity, and community.

Students were invited to experience a specially curated music playlist from the SWGS Music Department, featuring both iconic and emerging Black artists. The KS3 Art Club joined the event, offering students the opportunity to design graphic art inspired by Black history, using traditional Pan-African and Kente patterns. For those seeking a moment of calm, a mindfulness colouring area provided a quiet space for reflection.

Adding to the celebration, our canteen served a selection of dishes inspired by Black culture, including the ever-popular jerk chicken, which was a firm favourite among staff and students alike.

A heartfelt thank you to our EDI Ambassadors for their support in making this event possible, and to the Music and Art Departments for their valuable contributions.

Autism and ASD assemblies -Throughout the academic year

Throughout the year, ASD-focused assemblies were delivered to all year groups by our dedicated SWGS EDI Ambassadors. These sessions offered students valuable insight into Autism Spectrum Disorder (ASD), challenging common misconceptions and addressing negative perceptions. The assemblies explored the importance of accurate representation, highlighted key myths and facts surrounding Autism and ASD, and provided practical advice on how to foster inclusivity and create safe, supportive environments for all.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

World Teacher Day October 2024

5 October was World Teachers' Day - a global event launched by the United Nations Educational, Scientific and Cultural Organization (UNESCO) in 1994. World Teachers' Day celebrates the work of the dedicated teachers around the world who strive every day to provide lifelong, inclusive and quality learning opportunities for all. The EDI Ambassador Team wanted to share their appreciation of their teachers and the invaluable wider school staff that go above and beyond and make a difference at SWGS. Students had the opportunity to write postcards, located in the LRC, to members of staff.

ROCstars November 2024- April 2025

We were delighted to recruit our new ROCstars (Revision of Champion Stars) Team for 2024–25. The team comprised three Year 13 students. During their time in post, the team delivered a fantastic six-week revision programme to students at St Joseph's Catholic School, ran regular revision clinics for SWGS students throughout the year, and led a workshop on managing exam stress for Year 10 as part of their Live Well afternoon. A huge thank you to the ROCstars Team for their incredible hard work, dedication, creativity, and unwavering motivation over the year. Your contributions have made a real difference.

6F Multi-Cultural Event (MCE)- November 2024

On Monday 18 November our sixth formers brought the rich cultural diversity of the SWGS community to life with a vibrant celebration of music, dance, food, and traditional dress. The event featured wonderful contributions from cultures including the Philippines, Tahiti, Nigeria, the Caribbean, India, Bangladesh, Brazil, and many more. Students across the school came together to enjoy the performances and sample a variety of delicious cultural treats—from sushi and lumpia to crinkles, plantain chips, fuschka, and gulab jamun, to name just a few. The atmosphere was one of pride, unity, and joyful celebration. A huge thank you to everyone who helped organise the multicultural event, and to all the students who came along to support, cheer on their peers, and celebrate our shared community spirit.

New Anti-Bullying Ambassadors (ABA) recruited and trained October-December 2024

Year 10 and Year 12 students were invited to join the existing Anti-Bullying Ambassador (ABA) Team this year. Applicants were encouraged to demonstrate key qualities such as empathy, strong communication skills, integrity, trustworthiness, confidence, assertiveness, leadership, teamwork, reliability, and the ability to be a positive role model within the school community.

Following a successful application process and training delivered by current members of the ABA Team, we were pleased to welcome 16 new ambassadors to the group. Over the course of the year, the ABA Team has remained a strong and visible presence around the school, particularly during break and lunchtimes. They have also delivered assemblies, led tailored tutor time sessions, and played an important role in maintaining the Zen Zone—ensuring it remained a calm, inclusive space for students every Monday and Friday lunchtime.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Lunar New Year celebrations January 2025

Lunar New Year was celebrated on Wednesday 29 January, marking the beginning of the Year of the Snake. To honour this occasion, our EDI Ambassadors sold Lunar New Year envelopes throughout the week during lunchtime.

Traditionally, these red envelopes are exchanged between friends and family as a symbol of good fortune and well wishes for the year ahead. While they are often given with money inside, our version offered something more personal—each envelope contained a handwritten message from the sender, sharing words of kindness, encouragement, or luck. Once written, the envelopes were delivered by our team, helping to spread positivity and connection across the school community.

Holocaust Memorial Day event/service at Guildhall January 2025

South Wilts Grammar school was invited to speak at the Holocaust Memorial Day Civic service at the Guildhall, the theme for this year was 'For a Better Future'.

This event was curated by Sarah Gregson (Head of Community Services), it started with the Stockholm Statement and then we had talks from different organisations (e.g. Disability Interest Group Salisbury) and from individuals who shared personal recollections. Students were also shown pieces of artwork that we created during the Holocaust as part of the 'Created in Darkness' aspect of the service. Poetry and song also formed part of this emotive and moving memorial service. Our students were asked to share their experiences of what Equality, Diversity and Inclusion (EDI) means to them, what we do as a school to promote EDI and what it means to our school community. Students also got the chance to meet the High Sheriff of Wiltshire Dr Olivia Chapple and Deputy Lieutenant Dr Phil Harding. Thank you to Sarah Gregson for inviting us to be a part of this service.

Year 9 Live Well EDI Afternoon January 2025

Following the sixth form multicultural event, Year 9 students asked for their own EDI event. This took place during the second Live Well Afternoon where all students got creative and decorated a handprint to represent their own identity. These handprints were then placed together on an EDI display board for the school community to see. Students also volunteered to share their own cultural dances to the year group and there was excitement and applause as dances were performed including large group and solo dances. Thank you to all Year 9 students who embraced and got involved in their own EDI event.

Wiltshire Youth Council February 2025

Our Wiltshire Youth Council (WYC) Ambassadors have had a busy and impactful year. They've taken part in a range of meaningful activities—from conducting a Healthy Schools inspection and raising awareness for local charities, to collecting donations and representing the school at regular WYC meetings.

They also confidently presented at the Headteachers' Meeting and played a key role in the Emotional Wellbeing Summit held in March, contributing valuable insights on behalf of their peers. A heartfelt thank you to our WYC Ambassadors for all that you do—and continue to do—at SWGS and beyond. Your dedication is truly appreciated.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Nazanin Zaghari-Ratcliffe to speak at Salisbury Cathedral on International Women's Day March 2025

SWGS sixth form students were honoured to attend a special event at Salisbury Cathedral in recognition of International Women's Day. The guest speaker was Nazanin Zaghari-Ratcliffe, British-Iranian author and former political prisoner, who shared her powerful story of resilience and hope. Nazanin spoke movingly about her experience of being wrongfully imprisoned in Iran. In 2016, while visiting her parents with her 22-month-old daughter, she was arrested at Tehran airport on national security charges and held for nearly six years as part of a longstanding geopolitical dispute. Her eventual release in 2022 followed a tireless public campaign led by her husband, Richard. During the event, Nazanin shed light on her unjust conviction, her life during imprisonment, and her journey since returning home. She also highlighted the stories of other women still facing similar injustices, urging all of us to use our voices to advocate for justice and support one another through the power of community. One of our sixth form students confidently took part in the Q&A, posing two thoughtful and articulate questions to Nazanin during the fully booked event. We extend our sincere thanks to Salisbury Cathedral for the opportunity to attend this inspiring and unforgettable occasion.

Olive Branch Award March 2025

Some of our students have been taking part in educative initiative called The Olive Branch Award, led by the charity Solutions Not Sides. This programme is focused on empowering young people to become empathetic and constructive citizens, and reducing polarisation and prejudice, particularly in relation to the Israel- Palestine conflict. Students had an initial introduction to the historical context of the conflict, as session formed by multiple viewpoints created in consultation with both Israelis and Palestinians. Students then took part in Q&A workshop with Israeli and Palestinian citizens, who work as peacebuilders. Thank you to Solutions Not Sides for your engaging workshop and to the peacebuilders who kindly joined us. This opportunity was open to students in year 9-12. A huge thank you for Miss Clark for leading this award.

Year 10 Equality Diversity and Inclusion Day June 2024

South Wilts Grammar School (SWGS) proudly hosted a vibrant and inspiring series of workshops on 30 June 2025, designed to bring Equality, Diversity, and Inclusion (EDI) to life for Year 10 students through creativity, empathy, and hands-on learning. The event welcomed all Year 10 students, offering an immersive day of learning and celebration aimed at building bridges across cultures, experiences, and communities right here in Salisbury. The day featured a rich variety of interactive workshops, including:

- A Journey Through Japan - Students explored the elegance of Japanese culture by learning greetings, numbers, and everyday phrases, followed by creative origami activities and crafting their own greeting cards.
- Colourful India - This workshop immersed students in the vibrant traditions of India, including saree draping, the artistry of bindis, and an appreciation of India's cultural diversity.
- Life Through Different Eyes – Wiltshire Sight Workshop - Students experienced the challenges faced by people with sight loss through interactive activities, met a Paralympian volunteer, and got to know Dilly, a guide dog, fostering empathy and understanding.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

- Understanding Autism – Wiltshire Autism Hub - Representatives from Wiltshire Autism Hub provided a personal and educational insight into neurodiversity and what it means to live with autism, promoting compassion and awareness.
- Salisbury Foodbank - Through real-life stories and discussions, students learned how this vital local service supports families and communities in Salisbury, understanding the impact of small acts of kindness.
- Community Champions – You Make the Change! - Students pitched ideas for EDI-focused community projects, with the winning proposal set to be developed in the upcoming school year.
- Gaelic Football - Students received expert coaching from St. Jude's Gaelic Football Club, learning the fast-paced skills of this exciting Irish sport that combines elements of football and rugby.
- British Sign Language (BSL) & Deaf Awareness Workshop - Delivered by the Wiltshire and Dorset Deaf Association, this workshop introduced students to fingerspelling, everyday signs, and Deaf culture, culminating in signing to Louis Armstrong's What a Wonderful World.
- Creative Workshops Students chose between creating clay Mehndi handprints or painting mandala pebbles—an artistic, mindful exploration of culture facilitated by the Art Department.
- Latin Taster Students were introduced to Latin, the classical language that shaped Europe's history, offering a glimpse into its enduring influence on language, law, and thought.
- Quiet Space A designated area was available throughout the day for students to reflect, read, or engage quietly with games, providing a calm space to process the day's learning.

South Wilts Grammar School remains committed to fostering an inclusive and supportive environment where diversity is celebrated and every student is empowered to contribute positively to their community.

Other activities and competitions offered through the year include

- Show Racism the Red Card competition
- World Book Day Theme at SWGS was International Women's Day
- Emotional Well Being Voice Champion survey
- World Braille Day competition
- Interfaith picnic

EDI Team

KSK and KAN attended an EDI SWAT Day at Torquay Boys' Grammar School in November 2024 and shared good practice with them and the other grammar schools in attendance. They were particularly interested in our EDI Framework and student opportunities available (e.g. ABA Team, 6F MCE).

Following this meeting KSK and KAN created a survey using Microsoft forms to check students and staff awareness of the protected characteristics (The Equality Act), fundamental British values and our whole school EDI vision. Staff were also asked about any additional training linked EDI that they would like to access.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Actions taken after results analysis:

- Infographic created to highlight the what the Fundamental British Values (FBV).
- Detailed document that showcases what the FBV look like at SWGS with clear examples.
- Protected characteristics are displayed on EDI boards, in the staff room
- FBV infographic shared with all staff and displayed on EDI boards and in the staffroom
- Staff have been signposted to EDI related CPD via the staff bulletin
- Assembly for Year with a focus on FBV

Next steps:

- Find a date/time to deliver the FBV to all year groups in next academic year
- Deliver EDI assemblies to all key stages in term 1 to make everyone aware of this golden thread, our EDI Vision and opportunities available to all. (achieved- week beginning 22 September)

KAN had continued to work with EDI Ambassadors to celebrate and raise awareness of EDI events across the year. KAN has also re-branded the LGBTQ+ club to 'Be Yourself Club' and played a lead role in leading this club over the year. They organised a Pride Walk around the sports track. KAN has also been instrumental developing innovative ideas (e.g. interfaith picnic, and the appreciation space for BHM).

KSK has continued to work with the ABA Team to develop the Zen Zone space (available to all staff and students during Monday and Friday lunchtime in D9) and create bespoke intervention packages to support key stage 3 tutor group at the request of HoY's. KSK continues to review policies and update EQIAs ahead of trustee meetings.

House System

The House system is now fully embedded, with a clear and consistent calendar of inclusive events established across 2024–25. Activities such as food donation drives, gaming competitions, Bake Off, music, and volleyball have fostered participation across all key stages and strengthened the sense of community and belonging.

Pupil engagement remains high, with positive feedback highlighting the inclusivity and enjoyment of house assemblies. Leadership opportunities for Sixth Form students continue through the established appointment process for House Heads and Deputies, supported by regular meetings that enhance collaboration across year groups.

New initiatives, including the House Reporter role and a termly newsletter, have improved communication and celebration of achievements. The system now operates smoothly and independently, promoting leadership, teamwork, and whole-school spirit.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Literacy

Over the course of the year, Mark Nolan and Alice Chiddy-Gosling have continued to lead strategic work to raise the profile of reading and literacy across the school. Building on the school's commitment to disciplinary literacy, academic reading is now firmly embedded within subject curricula through updated departmental reading lists and the consistent use of the Vocabulary Teaching Toolkit. Staff and student training has focused on developing academic literacy, enabling students to engage confidently with complex texts and supporting teachers in modelling reading for learning across disciplines.

A culture of reading has taken firm root, aligning closely with Ofsted's recognition of the "palpable 'buzz' around reading at the school." Students from Years 7 to 13 are regularly exposed to high-quality texts, both in and beyond lessons. Year 7 students complete NGRT and NGST assessments to inform targeted interventions, while older students mentor younger peers as Reading Reps, creating a cross-phase community of readers. The tutor-time reading programme, shaped by ongoing student voice, has further supported a love of reading, contributing to pupils' cultural capital and supporting their intellectual development.

The Library continues to be a vital hub, both as a resource centre and a place where reading is celebrated. Author events, the addition of subject-specific texts, and the leadership of student librarians have all contributed to a vibrant reading culture. Events such as World Book Day, book swaps, and the Summer Soirée's Shakespeare performances have reinforced the inclusive message that reading belongs to everyone. Creative writing, too, is thriving, with student work showcased in the school magazine, fostering not just reading for pleasure but writing for purpose.

As Ofsted noted, "many pupils are enthusiastic readers" and "continue to develop an appreciation of literature, regardless of the subjects they are taking." Literacy at SWGS is no longer an add-on, it is a golden thread running through curriculum, culture, and community.

Live Well

The Live Well programme forms a central part of the mental health strategy at SWGS, teaching students about the importance of taking care of both physical and mental wellbeing, through the 8 Live Well strands. Live Well runs through the PSHE and tutor curricula, as well as through dedicated activities such as Live Well afternoons. Parents receive information about the Live Well programme through letters and in parent briefings.

Three Live Well afternoons were run in the first three terms and focussed in turn on Identity and Belonging, Careers and Aspirations and Wellbeing. Identity and Belonging built on the House Identity with a vintage Sports Day and House art project to provide varied options for all students. The second afternoon formed part of the stable careers programme with carefully planned activities matched against the Gatsby Benchmarks. For the final afternoon, Heads of Year planned these specifically with the context of their year group in mind ranging from a walk followed by hot chocolate and marshmallows for Year 7 and 8 to Clubbercise and a year group multicultural event for Year 9, revision strategies and mindful activity carouse for year 11.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

When surveyed, 795 students provided feedback about the Live Well programme. The vast majority of students enjoy the wellbeing programme, particularly the physical and social activities such as "Move Well" sessions, vintage sports, and walks around the track during tutor time, which help reduce stress and offer a break from academic pressure. There is also a strong desire for more "Live Well" afternoons spread throughout the year. Students appreciate when they have time to relax, connect with peers, and engage in creative or calming activities. They also value opportunities for more flexible, student-driven activities and would like to have more say in the types of wellbeing sessions offered.

Primary outreach/ social mobility

This year we have been able to offer Maths, Science, Drama (Little Mermaid Matinee 1 session- 89 students and staff) and Music (1 afternoon session- 223 students and staff in attendance) outreach to local primary schools (in total 18 sessions were attended by 12 schools, 4 were priority school as identified by the Index of Multiple Deprivation and the percentage of students in receipt of FSM). The overall number of outreach sessions was less than last year, due to Maths being offered until Term 2 and MFL was not offered this year. Transport continues to remain a barrier for schools engaging with Science outreach. The school mini bus is available for hire and has been offered to some schools to support them in attending.

We continue to work with Frog to offer students in receipt of pupil premium with access to the GSHA familiarisation portal and new for this year are working with Atom Learning. Atom learning is an online platform that has fun and engaging material to help children to familiarise themselves with 11+ material. Their platform is built around the national curriculum framework and has been designed to support the current attainment of students in Key Stage 2, whilst also helping to familiarising them with the 11+ material. This resource is available free of charge to any child in Year 4 and 5 who are eligible for free school meals at any point during the last 6 years. Atom Learning shared that 55 applications were made from PP families at 36 different primaries, but so far, only 25 of the applications have been verified.

This year we shared 81 Frog logins to SP/PP/PLAC students:

- 1-PLAC
- 17-PP (in comparison to 30 last year)
- 63-SP

41 students PP/SP passed the 11+ in September. 2 students passed with 3% lower pass mark. Of the number that passed 5 were PP (this lower than last year where we had 9 PP students pass the 11+)

Looking ahead to current academic year:

- Four bookings for Science Primary Outreach have been made so far this year (more expected) and letter for the Music Showcase in March was sent out at start of term 2.
- In talks with Maths about when these sessions will begin.
- Look to increase the number of PP students applying to take 11+, as this is down from last year.
- Launch a primary outreach campaign and investigate funding/sponsorship options so that more schools can engage with Science Primary Outreach sessions.

South Wilts Grammar School

Trustees' Report

Achievements and Performance (continued)

Sustainability

Sustainability at SWGS continues to thrive thanks to dedicated students and staff. Eco Club meets weekly and has focused recently on expanding the school's vegetable patch. Despite a dry season, they successfully harvested various crops and installed new rainwater butts to support future growth.

All students engaged in sustainability-themed assemblies. Mrs Briton raised awareness about reusable sanitary products, highlighting their environmental and financial benefits. Mr Lawrence spoke about climate change and recycling, connecting these issues to our daily habits and the UK's changing weather patterns.

SWGS proudly achieved Level 2 of the Royal Horticultural Society's Gardening Awards, thanks to students like Matthew and Florrie. The school also collaborated with Salisbury Museum on the "Fashioning Our Future" project. Year 10 students participated in a sustainable fashion workshop involving sketching, mending clothes, and creating recycled newspaper outfits.

Other notable initiatives include the successful Sunflower Sale, which raised over £120 for charity, and achieving Plastic Free Schools Award status from Surfers Against Sewage. Students identified and eliminated unnecessary single-use plastics, ran awareness assemblies, conducted a litter pick, and wrote to their local MP.

Specialist recycling has expanded to include batteries, Pringles pots, cosmetics containers, and biscuit wrappers—raising funds for Wiltshire Air Ambulance.

SWGS continues to offer Green Careers talks, with guest speakers from Natural England and the New Forest National Park sharing insights into careers in conservation and environmental management.

A Climate Action Plan is being developed by Mr Lawrence with input from students and staff, in line with national requirements. It will cover four key areas: decarbonisation, climate education, increasing biodiversity, and adapting school infrastructure to climate change impacts.

Looking ahead, Mrs Briton and Mr Lawrence are working with Friends of South Wilts on two exciting projects: 'Greening the Quads' and creating a wildflower meadow.

South Wilts Grammar School

Trustees' Report

Key Performance Indicators

The main Key Performance Indicator (KPI) is the delivery of a balanced or surplus budget whilst meeting the Academy development priorities. Additional more targeted KPIs were agreed by Trustees in March 2023 that have been since included in the monthly management accounts. These are:

- Number of months staffing costs that current reserves will cover
- YTD Spend on cost areas (IT, Estates Management, Energy) as a % of total spend per student
- Income Generation as a % of total income
- Cost of staffing as a % of total income
- Projected 3-5-year values for (annual in September only):
 - o Pupil numbers
 - o Service Premium
 - o Pupil premium numbers
 - o No. of FTE Staff and UPS profile

The analysis of these KPIs is included in the monthly management accounts and sent to the Resources, Audit and People committee Trustees. These KPIs are due to be reviewed in the new academic year.

Going Concern

After making appropriate enquiries, the Board of Trustees has a reasonable expectation that the Academy Trust has adequate resources to continue in operational existence for the foreseeable future. For this reason it continues to adopt the going concern basis in preparing the financial statements. Further details regarding the adoption of the going concern basis can be found in the Statement of Accounting Policies.

Financial Review

The Trustees report a net deficit of £926 (2024 - deficit of £164,000) on restricted general funds for the year.

Unrestricted funds see a deficit of £520,182 (2024 – deficit of £187,362) meaning the combined normal deficit for the year is £521,108 (2024 – deficit of £351,749). This leaves the Academy with available reserves of £1,400,693 (2024 - £1,921,801) to carry forward for use in future periods.

Total capital additions in the year were £481,745. These were funded through £24,959 DFC grant. £456,786 was transferred from unrestricted funds to cover the remaining spend.

The level of cash (including short term cash deposits classified as current asset investments) reduced by £335,466 (2024 – reduced by £263,894) and short term liabilities have increased by £277,632 (2024 – increased by £224,224) when compared to the prior period.

South Wilts Grammar School

Trustees' Report

Reserves Policy

The Board of Trustees of South Wilts Grammar School plan for, manage and maintain an adequate level of financial reserves to meet the needs and identified risks of the organisation.

School reserves may be held for two main reasons:

1. As contingency against financial risks and security
2. To meet planned commitments in future years that cannot be met by future income alone, e.g. plans for a major asset purchase or a significant project that requires the school to provide 'matched funding' or a significant contribution.

Therefore, the school will hold general contingency reserves which are made up of:

- The undesignated unrestricted reserve
- The restricted GAG general fund (which can be used to cover elements of those contingencies which fall under the purposes permitted for use of GAG funding).

Reserves are maintained in separate restricted and unrestricted balances, in day-to-day terms both are considered in aggregate for managing the overall financial position of the academy. The Trustees aim for these reserves to be maintained at a minimum of £450,000 or 10% of recurring GAG funding (whichever is lowest) to assist in protecting the academy from any future declines in funding, organisational change, larger than anticipated maintenance costs and to ensure funds are available for unforeseen events.

As the school is mainly funded by grants from the Department for Education, the use of which is regulated by the academy's funding agreement, funding is expected to be fully utilised in the accounting year for which it is provided, however funds can be set aside for future use as mentioned above.

The Trustees have considered future plans, projects and other spending needs and expect to utilise the reserves and bring them closer to the minimum target. The level of reserves and balances is monitored termly and details notified to the Resources, Audit and People committee and Board of Trustees.

Investment Policy

The Board of Trustees ensure that funds which are not immediately needed to cover anticipated expenditure are invested in such a way to maximise the school's income but with minimum risk.

The Academy currently has three savings accounts, all of which offer a competitive interest rate and allow instant access, access within 30 days and access within 95 days between them. This is considered reasonable if funds needed to be accessed.

South Wilts Grammar School

Trustees' Report

Principal Risks and Uncertainties

In accounting for the Local Government Pension Scheme, whilst for the last 2 years there has been a pension asset that has been shown as zero in the accounts rather than an asset, the Academy recognises that there is the potential for a pension fund deficit for future years. The Trustees have no control over this fund and Wiltshire Council manage the fund and are responsible for setting the contribution levels. See note 23 for future contribution rates.

The Academy's cash deposits are held with Lloyds Banking Group Plc, Nationwide Building Society and Virgin Money. The Trustees are satisfied there is no material exposure to credit risk in respect of these cash deposits.

The Academy's credit profile is low; the only exposure is in receivables arising from the reclaim of VAT from HMRC. An analysis of outstanding receivables is available at note 12 of the accounts.

The Academy Trust's estate is well maintained to ensure it is safe and complies with relevant regulations. A recent survey confirmed that there was no presence of RAAC in any of the Trust's buildings. An asbestos survey is undertaken annually, and recommendations of the report adhered to, asbestos is closely monitored and managed. Legionella and Fire Risk Assessments are also carried out regularly as well as other services and checks to remain complaint.

The Trustees are responsible for identifying risks faced by the Academy, establishing procedure to mitigate these risks, and ensuring that all employees are aware of these procedures.

A regular review of risks is undertaken and controls are in place to mitigate these risks. The key controls used by the company include:

- Formal agendas and terms of reference for all committee meetings
- Comprehensive strategic planning, budgeting and management accounting
- Established organisational structures and lines of reporting
- Formal written policies with a published cycle of review
- Suitable accounting policies and internal financial control measures
- Clear authorisation and approval levels
- Formulaic monitoring of the necessary health and safety checks
- A risk register, which is monitored annually by the Board of Trustees
- Appointment of internal and external auditors

The Trustees have assessed the major risks to which the Academy is exposed, in particular those relating to the specific teaching, provision of facilities and other operational areas of the Academy, and its finances. The Trustees are satisfied that systems and procedures are in place to mitigate the exposure to major risks.

South Wilts Grammar School

Trustees' Report

Fundraising

As part of its work within the community, the Academy Trust undertakes fundraising activities, for example through fetes, cake sales, non-uniform days etc. The Academy Trust raises funds in order to support its own operations and also to make donations to local and national charities. The Academy Trust undertakes all such activities itself, with the help of its students and their families. We confirm that when fundraising:

- No unsolicited approaches are made to members of the public.
- No commercial participators are used.
- No regularity schemes or standards are applicable.
- No complaints were made to the Academy Trust during the year.

The Friends of South Wilts Grammar School (FOSWGS) (PTA) continue to actively support the school and raise funds.

The school has fundraised £5,267 this year through student, parent, community and staff contributions, mainly contributing to the three chosen charities voted for at the start of the year by students as follows:

- Salisbury Star Appeal
- Sophie's Legacy
- Doctors without Borders

But also supporting national fundraising events including Macmillan Cancer, the Poppy Appeal and Alzheimer's Society.

Plans for Future Periods

SWGS has been established for the last 14 years as a successful Single Academy Trust (SAT) and it is the Trust Board's intention to maintain this status, while at the same time investigating the potential benefits of establishing or joining a Multi Academy Trust (MAT) in the longer term. Over this period the school has grown within the physical constraints of the site from an intake of 128 in Year 7 to a current PAN of 160.

Our Sixth Form has developed into a thriving co-educational provision across a broad range of subjects. Through careful financial management the school has set and delivered a balanced budget and Trustees expect to continue to be able to do so, subject to DfE funding allocation. This has resulted in a healthy level of reserves and, while maintaining a prudent approach to reserves, Trustees intend to invest against our strategic priorities

The Trustees' Strategic Improvement Plan (TSIP) sets out the Trust Board's priorities, which are focused on:

1. Sixth Form. We are aiming to improve Sixth Form provision in order that all students achieve to their potential and are prepared for further education, careers, and their lives. To maintain a thriving Sixth Form Trustees expect to fund marketing activities and educational and infrastructural improvements that will continue to make SWGS an attractive option for post 16 education.

South Wilts Grammar School

Trustees' Report

Plans for Future Periods (continued)

2. Curriculum development. We are aiming to further develop the school's curriculum to ensure that it meets the needs of our students and prepares them for their futures. This requires continued investment in our experienced cadre of teaching staff, in offering a broad range of curriculum options at GCSE and 'A' level, and in curriculum development activities.
3. Resources, infrastructure and sustainability. We are aiming to increase the quality and range of resources, buildings and other infrastructure to enable us to deliver the curriculum effectively, safely and sustainably. Strategic plans for estate infrastructure and IT have been established identifying short, medium and long term needs and projected funding plans for each identified area.
4. Outward-facing leadership. We are aiming to research and secure beneficial partnerships with other organisations and our communities to help us achieve our vision. This includes consideration of the pros and cons of joining a MAT and seeking to find ways to serve our local and wider communities.
5. Improving governance effectiveness. We are aiming to improve the way Trustees carry out our planning, monitoring and evaluation responsibilities to ensure that the school maintains rigour and high expectations and moves towards its vision.

Throughout our work, we seek to assure the highest standards of safeguarding, actively promote equality, diversity and inclusion approaches and to seek and adopt sustainable and environmentally focused options in our planning. Decisions about allocating resources are made in the light of the strategic improvement objectives listed above.

Funds Held as Custodian Trustee on Behalf of Others

The Academy trust hold no funds as Custodian Trustees on behalf of others.

Auditor

Insofar as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditor is unaware
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees' report, incorporating a strategic report, was approved by order of the Board of Trustees, as the company directors, on 17 December 2025 and signed on the Board's behalf by:



Mrs Elizabeth Ogilvie
Chair of Trustees

South Wilts Grammar School

Governance Statement

Scope of Responsibility

As Trustees, we acknowledge we have overall responsibility for ensuring that South Wilts Grammar School has an effective and appropriate system of control, financial and otherwise. However, such a system is designed to manage rather than eliminate the risk of failure to achieve business objectives, and can provide only reasonable and not absolute assurance against material misstatement or loss.

As Trustees, we have reviewed and taken account of the guidance in DfE's Governance Guide.

The Board of Trustees has delegated the day-to-day responsibility to the Headteacher, Dr Amanada Smith, as Accounting Officer, for ensuring financial controls conform with the requirements of both propriety and good financial management and in accordance with the requirements and responsibilities assigned to it in the funding agreement between South Wilts Grammar School and the Secretary of State for Education. They are also responsible for reporting to the Board of Trustees any material weaknesses or breakdowns in internal control.

Governance

The information on governance included here supplements that described in the Trustees' Report and in the Statement of Trustees' Responsibilities. The Board of Trustees has formally met six times during the year. Attendance during the year at meetings of the Board of Trustees was as follows:

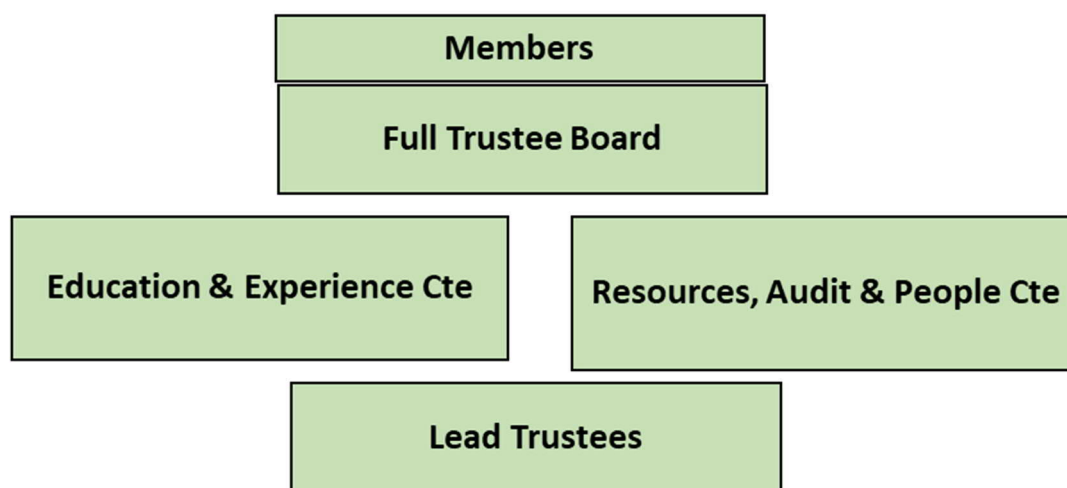
<u>Trustee</u>	<u>Meetings attended</u>	<u>Out of a possible</u>
Dr Amanda Smith (Accounting Officer)	5	5
Mr Nicholas Lay *	4	5
Mr William Davies	3	5
Mrs Emma Licciardi (resigned 7 October 2024)	0	1
Mrs Elizabeth Ogilvie (Chair appointed 1 September 2024)	5	5
Mrs Alma Goodall *	5	5
Mr John Oldroyd	5	5
Mr Howard Prince *(resigned 31 December 2024)	1	2
Mr Robert MacDonald *	4	5
Mrs Alexandra Raworth *(Staff Governor)	5	5
Mrs Sharon Hackett (Staff Governor)	5	5
Ms Efrim Niccals	4	5
Mr Andrew Welfare	3	5
Mrs Caroline Smith (appointed 24 November 2024)	3	4
Mrs Lillie Robinson (appointed 18 December 2024)	3	4

South Wilts Grammar School

Governance Statement

Governance (continued)

Trustee Monitoring Structure – Roles & Responsibilities



Members oversee governance to ensure that it is effective but do not play an integral part of monitoring.

At South Wilts, Trustees distribute our monitoring and evaluation responsibilities to the FTB, committees and LTs. The Scheme of Delegation gives more precise detail of who does what.

Committees

Each committee has a set of monitoring responsibilities. These comprise mostly of compliance aspects and progress towards the Trustee School Improvement Plan (TSIP). Committee members have the opportunities to hear about and discuss school leaders plans, progress towards the School Development Plan (operational). Trustees challenge school leaders but also support and encourage them in their work, recognising the impact of challenge on their workload and wellbeing.

Certain decisions are delegated to committees as laid out in the Scheme of Delegation. Committees can also make recommendations to the FTB. The minutes of committees are forwarded to the Full Trustee Board along with the key associated documentation.

Lead Trustees (LTs)

There are certain areas of monitoring which are particularly important and for these, a Lead Trustee will gather more detailed information to pass on to committees and/or the FTB.

Some of these areas relate to the legal responsibilities of the Board (compliance) or are subject to additional scrutiny by Ofsted or the Department of Education (DfE), for example. Other LT roles are focused on the school's own priorities / vision.

South Wilts Grammar School

Governance Statement

Governance (continued)

At South Wilts, we have established the following LT roles which will be reviewed annually:

- Safeguarding / Attendance
- Curriculum
- Special Educational Needs
- Supporting Vulnerable Groups
- Health and Safety
- Careers / Pathways
- Sixth Form
- Equality, Diversity and Inclusion
- Digital Strategy
- Wellbeing

Full Trustee Board

The main purpose of FTB meetings is to bring together the work of the committees and gauge the impact on school improvement and development. We will discuss the progress made and review the next steps, adjusting as necessary.

At least once a year, Trustees will review and evaluate the progress made towards the vision and also the effectiveness of our governance. Our key documentation will be updated accordingly.

Conflicts of interest:

South Wilts Grammar School maintains an up-to-date and complete register of interests. All key staff and all Trustees and Members are required to complete a business interest form at the start of each term in September. There is a standing agenda item for each committee meeting and the Full Board meetings to enquire if there have been any changes to individuals' business interests. If there have then the Trustee is required to complete a new form, and the register is immediately updated.

The register is monitored by the Governance Professional, and any conflicts are addressed and resolved as necessary. The Trust has a plan in place to introduce a conflicts of interest policy in the new academic year to help manage this process.

South Wilts Grammar School

Governance Statement

Governance (continued)

Governance reviews:

Over the last two years, Trustees have undertaken significant improvements to their governance roles and responsibilities. Changes to the strategic priorities, the structure of committees and the monitoring and evaluation activities have raised awareness.

A Trustee Skills Audit was carried out in 2023-24 by self-assessment against NGA recommended criteria. This exercise was completed by 10 Trustees and the overall conclusion from the scores and their distribution, together with individual commentaries, was that the Trust Board possessed a strong set of the skills required to govern the school effectively. The subsequent Head Teacher recruitment process, in which every member of the Board participated, further increased our collective experience. The audit provided an excellent basis for further Trustee development planning and this is being pursued with our Governance Professional.

An external review of governance was undertaken three years previously. The structure of the Trustee Board was put in place in soon after (see above). It is anticipated that an external review of governance and a new skills audit will be carried out in 2025/6.

The Trustee Board examines how well it carries out its work annually at the Strategy Day and also evaluates the actions of the Board at Full Trustee Board meetings. The Chair undertook a Trustee Skills and Experience Audit during this year which has resulted in the Board seeking expertise including in buildings, finance and enterprise.

The Resources, Audit and People Committee is a sub-committee of the main Board of Trustees. Its purpose is to recommend a strategic resources plan identifying the Academy's long term aims and one-year objectives to achieve them; to organise and evaluate both; to recommend an annual budget to support the one year objectives; to monitor spending; to recommend the end of year Annual Report and Financial Accounts. As part of the Audit remit its purpose is to intervene if there are signs that something is seriously amiss, in particular, in connection with explanations given by auditors and management; to commission investigations and seek professional advice as considered necessary, e.g. potential instances of fraud or cases of whistleblowing; to provide the Board of Trustees with an additional level of independent and objective review; to provide internal and external auditors with direct access; to advise the Board of Trustees on internal and external audit findings from their reports and management letter; to provide assurance to the Board of Trustees on the adequacy and effectiveness of the systems of internal control; to ensure that the statement in the Annual Report that the major risks which the Academy is exposed to (as identified by the Board of Trustees) have been reviewed and the systems established to mitigate these risks; to advise the Board of Trustees on the appointment and remuneration of internal and external auditors Attendance at committee meetings during the year was as follows:

South Wilts Grammar School

Governance Statement

Governance (continued)

<u>Trustee</u>	<u>Meetings attended</u>	<u>Out of a possible</u>
Dr Amanda Smith	5	5
Mr Will Davies	0	5
Mr Nicholas Lay	2	5
Mr Robert MacDonald	4	5
Mr Howard Prince	1	1
Mrs Liz Ogilvie	1	5
Mrs Alexandra Raworth	2	5
Mr Andrew Welfare	3	5
Mr John Oldroyd	5	5

Dr Smith attends all meetings in her role as Accounting Officer but is not a voting member of the committee.

Review of Value for Money

As Accounting Officer the Headteacher has responsibility for ensuring that the Academy Trust delivers good value in the use of public resources. The Accounting Officer understands that value for money refers to the educational and wider societal outcomes as well as estates safety and management, achieved in return for the taxpayer resources received.

The Accounting Officer considers how the Academy Trust's use of its resources has provided good value for money during each academic year, and reports to the Board of Trustees where value for money can be improved, including the use of benchmarking data where appropriate. The Accounting Officer for the Academy Trust has delivered improved value for money during the year by:

- Effective purchasing - Trustees and senior members of staff have procedures in place for assessing need and obtaining goods and services that provide "Best Value" in terms of suitability, efficiency, time and cost.
- Contracts and Services are reviewed and renegotiated regularly to ensure the best mix of quality and cost effectiveness.
- Major purchases and contracts are always tendered.
- Effective estate management to ensure the Trust's estate is safe, well maintained and complies with regulations.
- Better income generation - The Academy explores every opportunity to generate income through letting of academy facilities during evening, weekends and holiday periods.
- The Academy ensures that monies are actively managed and invested in appropriate higher interest accounts.

South Wilts Grammar School

Governance Statement

The Purpose of the System of Internal Control

The system of internal control is designed to manage risk to a reasonable level rather than to eliminate all risk of failure to achieve policies, aims and objectives. It can, therefore, only provide reasonable and not absolute assurance of effectiveness. The system of internal control is based on an on-going process designed to identify and prioritise the risks to the achievement of Academy Trust policies, aims and objectives, to evaluate the likelihood of those risks being realised and the impact should they be realised, and to manage them efficiently, effectively and economically. The system of internal control has been in place in South Wilts Grammar School for the period 1 September 2024 to 31 August 2025 and up to the date of approval of the annual report and financial statements.

Capacity to Handle Risk

The Board of Trustees has reviewed the key risks to which the Academy Trust is exposed together with the operating, financial and compliance controls that have been implemented to mitigate those risks. The Board of Trustees is of the view that there is a formal on-going process for identifying, evaluating and managing the Academy Trust's significant risks that has been in place for the period 1 September 2024 to 31 August 2025 and up to the date of approval of the annual report and financial statements. This process is regularly reviewed by the Board of Trustees.

The Risk and Control Framework

The Academy Trust's system of internal control is based on a framework of regular management information and administrative procedures including the segregation of duties and a system of delegation and accountability. In particular, it includes:

- comprehensive budgeting and monitoring systems with an annual budget and periodic financial reports which are reviewed and agreed by the Board of Trustees
- regular reviews by the Resources and Audit Committee of reports which indicate financial performance against the forecasts and of major purchase plans, capital works and expenditure programmes
- setting targets to measure financial and other performance
- clearly defined purchasing (asset purchase or capital investment) guidelines
- identification and management of risks

The Board of Trustees has considered the need for a specific internal audit function and has decided to buy in an internal service and appoint Sam Lock limited as internal auditor for the year 2024-25.

The internal auditor's role includes giving advice on financial matters and performing a range of checks on the Academy Trust's financial and other systems. In particular, the checks carried out in the current period included:

- testing of payroll systems
- testing of purchase systems
- testing of income systems
- testing of control account/bank reconciliations
- testing of monthly financial procedures and budgeting
- testing of compliance with the Academy Trust Handbook

South Wilts Grammar School

Governance Statement

The Risk and Control Framework (continued)

On a twice yearly basis, the internal auditor reports to the Board of Trustees, through the Resources and Audit Committee on the operation of the systems of control and on the discharge of the Board of Trustees' financial responsibilities and annually prepares an annual summary report to the committee outlining the areas reviewed, key findings, recommendations and conclusions to help the committee consider actions and assess year on year progress.

The schedule of work was delivered as planned and there were no material control or other issues reported by the internal auditor to date.

Review of Effectiveness

As Accounting Officer, the Headteacher has responsibility for reviewing the effectiveness of the system of internal control. During the year in question the review has been informed by:

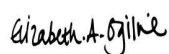
- the work of the internal auditor
- the work of the external auditor
- the school resource management self-assessment tool
- the work of the executive managers within the Academy Trust who have responsibility for the development and maintenance of the internal control framework

The Accounting Officer has been advised of the implications of the result of their review of the system of internal control by the Resources and Audit Committee and a plan to address weaknesses and ensure continuous improvement of the system is in place.

Conclusion

Based on the advice of the Resources and Audit Committee and the Accounting Officer, the Board of Trustees is of the opinion that the Academy Trust has an adequate and effective framework for governance, risk management and control.

Approved by order of the members of the Board of Trustees on 17 December 2025 and signed on its behalf by:



Mrs Elizabeth Ogilvie
Chair of Trustees



Dr Amanda Smith
Accounting Officer

South Wilts Grammar School

Statement of Regularity, Propriety and Compliance

As Accounting Officer of South Wilts Grammar School I confirm that I have had due regard to the framework of authorities governing regularity, propriety and compliance, including the Academy Trust's funding agreement with DfE, and the requirements of the Academy Trust Handbook, including responsibilities for estates safety and management. I have also considered my responsibility to notify the Academy Trust Board of Trustees and DfE of material irregularity, impropriety and non-compliance with terms and conditions of all funding, including for estates safety and management.

I confirm that I, and the Board of Trustees are able to identify any material irregular or improper use of all funds by the Academy Trust, or material non-compliance with the framework of authorities.

I confirm that no instances of material irregularity, impropriety or non-compliance have been discovered to date. If any instances are identified after the date of this statement, these will be notified to the Board of Trustees and DfE.

A J Smith

Dr Amanda Smith
Accounting Officer
17 December 2025

South Wilts Grammar School

Statement of Trustees' Responsibilities

The Trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with the Academies Accounts Direction published by the Department for Education, United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

Company law requires the Trustees to prepare financial statements for each financial year. Under company law, the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charitable company and of its incoming resources and application of resources, including its income and expenditure, for that period. In preparing these financial statements, the Trustees are required to:

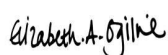
- select suitable accounting policies and then apply them consistently
- observe the methods and principles in the Charities SORP 2019 and the Academies Accounts Direction 2024 to 2025
- make judgments and accounting estimates that are reasonable and prudent
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business

The Trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charitable company's transactions and disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees are responsible for ensuring that in its conduct and operation the charitable company applies financial and other controls, which conform with the requirements both of propriety and of good financial management. They are also responsible for ensuring grants received from DfE have been applied for the purposes intended.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Approved by order of the members of the Board of Trustees on 17 December 2025 and signed on its behalf by:



Mrs Elizabeth Ogilvie
Chair of Trustees

South Wilts Grammar School

Independent Auditor's Report on the Financial Statements to the Members of South Wilts Grammar School

Opinion

We have audited the financial statements of South Wilts Grammar School ('the charitable company') for the year ended 31 August 2025 which comprise the Statement of Financial Activities (including the Income and Expenditure Account), the Balance Sheet, the Statement of Cash Flows, and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law, United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice), including Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland', the Charities SORP 2019, and the Academies Accounts Direction 2024 to 2025 issued by the Department for Education.

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 August 2025 and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- have been prepared in accordance with the requirements of the Companies Act 2006; and
- have been properly prepared in accordance with the Charities SORP 2019 and Academies Accounts Direction 2024 to 2025.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

South Wilts Grammar School

Independent Auditor's Report on the Financial Statements to the Members of South Wilts Grammar School

Other information

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. It includes the Reference and Administrative Details, the Trustees' Report (including the Strategic Report), and the Governance Statement. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinion on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Trustees' Report for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Trustees' Report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees' Report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us;
- the financial statements are not in agreement with the accounting records and returns;
- certain disclosures of Trustees' remuneration specified by law are not made; or
- we have not obtained all the information and explanations necessary for the purposes of our audit.

South Wilts Grammar School

Independent Auditor's Report on the Financial Statements to the Members of South Wilts Grammar School

Responsibilities of the Trustees

As explained more fully in the Statement of Trustees' Responsibilities, the Trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the Trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Our responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue a Report of the Independent Auditors that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

- We obtained an understanding of the legal and regulatory frameworks that are applicable to the Academy Trust, and the sector in which it operates. These include but are not limited to compliance with the Companies Act 2006, United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice), including Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland', the Charities SORP 2019, the Academy Trust Handbook 2024, and the Academies Accounts Direction 2024 to 2025.
- We obtained an understanding of how the Academy Trust is complying with these frameworks through discussions with management.

South Wilts Grammar School

Independent Auditor's Report on the Financial Statements to the Members of South Wilts Grammar School

- We enquired with management whether there were any instances of non-compliance with laws and regulations or whether they had knowledge of actual or suspected fraud. These enquiries are corroborated through follow-up audit procedures including but not limited to a review of legal and professional costs, correspondence and a review of board minutes.
- We assessed the susceptibility of the Academy Trust's financial statements to material misstatement, including the risk of fraud and management override of controls. We designed our audit procedures to respond to this assessment, including the identification and testing of any related party transactions and the testing of journal transactions that arise from management estimates, that are determined to be of significant value or unusual in their nature.
- We assessed the appropriateness of the collective competence and capabilities of the engagement team, including consideration of the engagement team's knowledge and understanding of the sector in which the Academy Trust operates in, and their practical experience through training and participation with audit engagements of a similar nature.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our Independent Auditor's Report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Michaela Johns

M Johns FCCA (Senior statutory auditor)
For and on behalf of Hopper Williams & Bell Limited
Statutory Auditor
Highland House, Mayflower Close, Chandlers Ford, Eastleigh SO53 4AR

Date 19 Dec 2025

South Wilts Grammar School

Independent Reporting Accountant's Assurance Report on Regularity to South Wilts Grammar School and the Secretary of State for Education

In accordance with the terms of our engagement letter dated 1 September 2025 and further to the requirements of the Department for Education (DfE), as included in the extant Framework and Guide for External Auditors and Reporting Accountants of Academy Trusts, we have carried out an engagement to obtain limited assurance about whether anything has come to our attention that would suggest, in all material respects, the expenditure disbursed and income received by South Wilts Grammar School during the period 1 September 2024 to 31 August 2025 have not been applied to the purposes intended by Parliament and that the financial transactions do not conform to the authorities which govern them.

This report is made solely to South Wilts Grammar School and the Secretary of State for Education in accordance with the terms of our engagement letter. Our work has been undertaken so that we might state to South Wilts Grammar School and the Secretary of State for Education those matters we are required to state in a report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than South Wilts Grammar School and the Secretary of State for Education, for our work, for this report, or for the conclusion we have formed.

Respective responsibilities of the Accounting Officer of South Wilts Grammar School and the reporting accountant

The Accounting Officer is responsible, under the requirements of South Wilts Grammar School's funding agreement with the Secretary of State for Education and the Academy Trust Handbook for ensuring that expenditure disbursed and income received is applied for the purposes intended by Parliament and the financial transactions conform to the authorities which govern them.

Our responsibilities for this engagement are established in the United Kingdom by our profession's ethical guidance and are to obtain limited assurance and report in accordance with our engagement letter and the requirements of the extant Framework and Guide for External Auditors and Reporting Accountants of Academy Trusts. We report to you whether anything has come to our attention in carrying out our work which suggests that in all material respects, expenditure disbursed and income received during the period 1 September 2024 to 31 August 2025 have not been applied for the purposes intended by Parliament or that the financial transactions do not conform to the authorities which govern them.

South Wilts Grammar School

Independent Reporting Accountant's Assurance Report on Regularity to South Wilts Grammar School and the Secretary of State for Education

Approach

We conducted our engagement in accordance with the Framework and Guide for External Auditors and Reporting Accountants of Academy Trusts issued by DfE, which requires a limited assurance engagement as set out in our engagement letter.

The objective of a limited assurance engagement is to perform such procedures as to obtain information and explanations in order to provide us with sufficient appropriate evidence to express a negative conclusion on regularity.

A limited assurance engagement is more limited in scope than a reasonable assurance engagement and consequently does not enable us to obtain assurance that we would become aware of all significant matters that might be identified in a reasonable assurance engagement. Accordingly, we do not express a positive opinion.

Our engagement includes examination, on a test basis, of evidence relevant to the regularity and propriety of the Academy Trust's income and expenditure.

The work undertaken to draw to our conclusion includes:

- Consideration as to whether prior approval was sought from the Secretary of State where it is required by the Academy Trust Handbook (effective from 1 September 2024) (ATH).
- Review of any special payments to staff, including compromise agreements, to consider whether prior approval was sought where required by the ATH and that any payments are in line with the severance guidance published by DfE.
- Consideration as to whether any borrowings have been made in accordance with the ATH.
- Review of any 'minded to' letters or Notices to Improve which have been issued to the Academy Trust.
- Review of any transactions with related parties to ensure that they have been carried out in accordance with the ATH.
- Review of governance arrangements to determine whether the requirements of the ATH have been met.
- Review of the Academy Trust's internal controls, including whether the general control environment has regard to the regularity of underlying transactions, including fraud management.
- Review of the Academy Trust's procurement policies to determine effectiveness and testing a sample of purchases to confirm that the policies have been correctly implemented.
- Identifying any conditions associated with specialist grant income and determining whether it has been spent as the purposes intended.

South Wilts Grammar School

Independent Reporting Accountant's Assurance Report on Regularity to South Wilts Grammar School and the Secretary of State for Education

Conclusion

In the course of our work, nothing has come to our attention which suggests that in all material respects the expenditure disbursed and income received during the period 1 September 2024 to 31 August 2025 has not been applied for the purposes intended by Parliament or that the financial transactions do not conform to the authorities which govern them.

Michaela Johns

M Johns FCCA

Reporting Accountant

Hopper Williams & Bell Limited

Chartered Accountants

Highland House, Mayflower Close, Chandlers Ford, Eastleigh SO53 4AR

Date 19 Dec 2025

South Wilts Grammar School

Statement of Financial Activities for the year ended 31 August 2025 (including Income and Expenditure Account)

	Note	Un- restricted funds £	Restricted General Funds £	Restricted Pension Funds £	Restricted Fixed Asset Funds £	2024/25 Total £	2023/24 Total £
Income and endowments from:							
Donations and capital grants	2	29,680	6,071	-	24,959	60,710	80,951
Other trading activities	4	228,648	11,335	-	-	239,983	82,209
Investments	5	51,105	-	-	-	51,105	37,924
Charitable activities:							
Funding for the academy trust's educational operations	3	-	7,821,566	-	-	7,821,566	7,328,993
Total		309,433	7,838,972	-	24,959	8,173,364	7,530,077
Expenditure on:							
Charitable activities:							
Academy trust educational operations	7	-	8,212,727	(85,000)	211,565	8,339,292	7,830,085
Net income / (expenditure)		309,433	(373,755)	85,000	(186,606)	(165,928)	(300,008)
Transfers between funds	15	(829,615)	372,829	-	456,786	-	-
Other recognised gains / (losses):							
Actuarial losses on defined benefit pension schemes	23	-	-	(85,000)	-	(85,000)	(64,000)
Net movement in funds		(520,182)	(926)	-	270,180	(250,928)	(364,008)
Reconciliation of funds							
Total funds brought forward		1,880,407	41,394	-	8,907,042	10,828,843	11,192,851
Total funds carried forward		1,360,225	40,468	-	9,177,222	10,577,915	10,828,843

The notes on pages 59 to 81 form part of these financial statements.

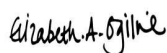
South Wilts Grammar School

Balance Sheet as at 31 August 2025

Company Number 07451741

	Note	2025 £	2025 £	2024 £	2024 £
Fixed assets					
Tangible assets	11		9,177,222		8,907,042
Current assets					
Debtors	12	389,706		297,716	
Investments	13	521,787		504,567	
Cash at bank and in hand		<u>1,462,726</u>		<u>1,815,412</u>	
		2,374,219		2,617,695	
Liabilities					
Creditors: Amounts falling due within one year	14	<u>(973,526)</u>		<u>(695,894)</u>	
Net current assets			<u>1,400,693</u>		<u>1,921,801</u>
Total assets less current liabilities			10,577,915		10,828,843
Defined benefit pension scheme liability	23		-		-
Total net assets			<u>10,577,915</u>		<u>10,828,843</u>
Funds of the academy trust:					
Restricted funds					
Fixed asset fund	15	9,177,222		8,907,042	
Restricted income fund	15	<u>40,468</u>		<u>41,394</u>	
Total restricted funds			9,217,690		8,948,436
Unrestricted income funds	15		1,360,225		1,880,407
Total funds			<u>10,577,915</u>		<u>10,828,843</u>

The financial statements on pages 56 to 81 were approved by the Trustees and authorised for issue on 17 December 2025 and are signed on their behalf by:



Mrs Elizabeth Ogilvie
Chair of Trustees

The notes on pages 59 to 81 form part of these financial statements.

South Wilts Grammar School

Statement of Cash Flows for the year ended 31 August 2025

	Note	2025 £	2024 £
Cash flows from operating activities			
Net cash provided by (used in) operating activities	18	136,223	(127,557)
Cash flows from investing activities	19	(488,909)	(640,904)
Change in cash and cash equivalents in the reporting period		<u>(352,686)</u>	<u>(768,461)</u>
Cash and cash equivalents at 1 September 2024		1,815,412	2,583,873
Cash and cash equivalents at 31 August 2025	20	<u>1,462,726</u>	<u>1,815,412</u>

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

1 Accounting policies

A summary of the principal accounting policies adopted (which have been applied consistently, except where noted), judgements and key sources of estimation uncertainty, is set out below.

Basis of Preparation

The financial statements of the Academy Trust, which is a public benefit entity under FRS 102, have been prepared under the historical cost convention in accordance with the Financial Reporting Standard Applicable in the UK and Republic of Ireland (FRS 102), the Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (Charities SORP (FRS 102)), the Academies Accounts Direction 2024 to 2025 issued by DfE, the Charities Act 2011 and the Companies Act 2006. The financial statements are prepared in sterling which is the functional currency of the Academy Trust and are rounded to the nearest £1.

Going Concern

The Trustees assess whether the use of going concern is appropriate i.e. whether there are any material uncertainties related to events or conditions that may cast significant doubt on the ability of the company to continue as a going concern. The Trustees make this assessment in respect of a period of at least one year from the date of authorisation for issue of the financial statements and have concluded that the Academy Trust has adequate resources to continue in operational existence for the foreseeable future and there are no material uncertainties about the Academy Trust's ability to continue as a going concern, thus they continue to adopt the going concern basis of accounting in preparing the financial statements.

Income

All incoming resources are recognised when the Academy Trust has entitlement to the funds, the receipt is probable and the amount can be measured reliably.

- Donations

Donations are recognised on a receivable basis (where there are no performance-related conditions) where the receipt is probable and the amount can be reliably measured.

- Grants

Grants are included in the Statement of Financial Activities on a receivable basis. The balance of income received for specific purposes but not expended during the period is shown in the relevant funds on the balance sheet. Where income is received in advance of meeting any performance-related conditions there is not unconditional entitlement to the income and its recognition is deferred and included in creditors as deferred income until the performance-related conditions are met. Where entitlement occurs before income is received, the income is accrued.

General Annual Grant is recognised in full in the Statement of Financial Activities in the year for which it is receivable and any abatement in respect of the period is deducted from income and recognised as a liability.

Capital grants are recognised in full when there is an unconditional entitlement to the grant. Unspent amounts of capital grants are reflected in the balance sheet in the restricted fixed asset fund. Capital grants are recognised when there is entitlement and are not deferred over the life of the asset on which they are expended.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

Income (continued)

- Other Income

Other income, including the hire of facilities, is recognised in the period it is receivable and to the extent the Academy Trust has provided the goods or services.

- Donated goods, facilities and services

Goods donated for resale are included at fair value, being the expected proceeds from sale less the expected costs of sale. If it is practical to assess the fair value at receipt, it is recognised in stock and 'Income from other trading activities'. Upon sale, the value of the stock is charged against 'Income from other trading activities' and the proceeds are recognised as 'Income from other trading activities'. Where it is impractical to fair value the items due to the volume of low value items they are not recognised in the financial statements until they are sold. This income is recognised within 'Income from other trading activities'.

Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use.

- Charitable Activities

These are costs incurred on the Academy Trust's educational operations, including support costs and costs relating to the governance of the Academy Trust apportioned to charitable activities.

All resources expended are inclusive of irrecoverable VAT.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

Tangible Fixed Assets

Assets costing £5,000 or more are capitalised as tangible fixed assets and are carried at cost, net of depreciation and any provision for impairment.

Where tangible fixed assets have been acquired with the aid of specific grants, either from the government or from the private sector, they are included in the Balance Sheet at cost and depreciated over their expected useful economic life. Where there are specific conditions attached to the funding requiring the continued use of the asset, the related grants are credited to a restricted fixed asset fund in the Statement of Financial Activities and carried forward in the Balance Sheet. Depreciation on the relevant assets is charged directly to the restricted fixed asset fund in the Statement of Financial Activities.

Depreciation is provided on all tangible fixed assets other than land and assets under construction, at rates calculated to write off the cost of each asset on a straight-line basis over its expected useful life, as follows:

Freehold Land and Buildings	50 years straight line on buildings; not provided on land
Plant and Machinery	15 years straight line
Computer Equipment	5 years straight line
Motor Vehicles	5 years straight line

Where the Academy Trust can identify the value of major components of freehold or leasehold buildings based upon additions following conversion to academy status, the Academy Trust reviews whether one or more such components have significantly different patterns of consumption of economic benefits. In such cases, the Academy Trust allocates the cost of the asset to its major components and depreciates each component separately over its useful life.

Assets in the course of construction are included at cost. Depreciation on these assets is not charged until they are brought into use and reclassified to freehold or leasehold land and buildings.

A review for impairment of a fixed asset is carried out if events or changes in circumstances indicate that the carrying value of any fixed asset may not be recoverable. Shortfalls between the carrying value of fixed assets and their recoverable amounts are recognised as impairments. Impairment losses are recognised in the Statement of Financial Activities.

Liabilities

Liabilities are recognised when there is an obligation at the balance sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the Academy Trust anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

Provisions

Provisions are recognised when the Academy Trust has an obligation at the reporting date as a result of a past event which it is probable will result in the transfer of economic benefits and the obligation can be estimated reliably.

Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre-tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

Leased Assets

Rentals under operating leases are charged on a straight line basis over the lease term.

Current asset investments

Current asset investments comprise fixed term bank deposits. These investments are classified as a basic financial instrument and are measured at amortised cost.

Financial Instruments

The Academy Trust only holds basic financial instruments as defined in FRS 102. The financial assets and financial liabilities of the Academy Trust and their measurement basis are as follows:

Financial assets

Trade and other debtors are basic financial instruments and are debt instruments measured at amortised cost. Prepayments are not financial instruments.

Cash at bank

Cash at bank is classified as a basic financial instrument and is measured at face value. An investment is treated as a cash equivalent when it has a short maturity of three months or less from the date of acquisition.

Financial liabilities

Trade creditors, accruals and other creditors are financial instruments, and are measured at amortised cost. Taxation and social security are not included in the financial instruments disclosure definition. Deferred income is not deemed to be a financial liability, as the cash settlement has already taken place and there is an obligation to deliver services rather than cash or another financial instrument.

Taxation

The Academy Trust is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

Accordingly, the Academy Trust is potentially exempt from taxation in respect of income or capital gains received within categories covered by part 11, chapter 3 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

Pensions Benefits

Retirement benefits to employees of the Academy Trust are provided by the Teachers' Pension Scheme ('TPS') and the Local Government Pension Scheme ('LGPS'). These are defined benefit schemes.

The TPS is an unfunded scheme and contributions are calculated to spread the cost of pensions over employees' working lives with the Academy Trust in such a way that the pension cost is a substantially level percentage of current and future pensionable payroll. The contributions are determined by the Government Actuary based on quadrennial valuations using a prospective unit credit method. TPS is an unfunded multi-employer scheme with no underlying assets to assign between employers. Consequently, the TPS is treated as a defined contribution scheme for accounting purposes and the contributions recognised in the period to which they relate.

The LGPS is a funded multi-employer scheme and the assets are held separately from those of the Academy Trust in separate trustee administered funds. Pension scheme assets are measured at fair value and liabilities are measured on an actuarial basis using the projected unit credit method and discounted at a rate equivalent to the current rate of return on a high quality corporate bond of equivalent term and currency to the liabilities. The actuarial valuations are obtained at least triennially and are updated at each balance sheet date. The amounts charged to net income/(expenditure) are the current service costs and the costs of scheme introductions, benefit changes, settlements and curtailments. They are included as part of staff costs as incurred. Net interest on the net defined benefit liability/asset is also recognised in the Statement of Financial Activities and comprises the interest cost on the defined benefit obligation and interest income on the scheme assets, calculated by multiplying the fair value of the scheme assets at the beginning of the period by the rate used to discount the benefit obligations. The difference between the interest income on the scheme assets and the actual return on the scheme assets is recognised in other recognised gains and losses.

Actuarial gains and losses are recognised immediately in other recognised gains and losses.

A defined benefit plan asset is recognised only to the extent that the Academy Trust expects to be able to recover the surplus either through reduced contributions in the future or through refunds from the plan.

Fund Accounting

Unrestricted income funds represent those resources which may be used towards meeting any of the charitable objects of the Academy Trust at the discretion of the Trustees.

Restricted fixed asset funds are resources which are to be applied to specific capital purposes imposed by funders where the asset acquired or created is held for a specific purpose.

Restricted general funds comprise all other restricted funds received with restrictions imposed by the funder/donor and include grants from the Department for Education Group.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

Critical accounting estimates and areas of judgement

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

Critical accounting estimates and assumptions

The Academy Trust makes estimates and assumptions concerning the future. The resulting accounting estimates and assumptions will, by definition, seldom equal the related actual results. The estimates and assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year are discussed below.

The present value of the Local Government Pension Scheme defined benefit liability depends on a number of factors that are determined on an actuarial basis using a variety of assumptions. The assumptions used in determining the net cost (income) for pensions include the discount rate. Any changes in these assumptions will impact the carrying amount of the pension liability. Furthermore, a roll forward approach which projects results from the latest full actuarial valuation performed at 31 March 2022 has been used by the actuary in valuing the pensions liability at 31 August 2025. Any differences between the figures derived from the roll forward approach and a full actuarial valuation would impact on the carrying amount of the pension liability.

The assumptions used are disclosed in note 23.

Critical areas of judgement

A defined benefit plan asset of £1,514,000 (2024: £512,000) has not been recognised as the Academy Trust does not expect to be able to recover the surplus either through reduced contributions in the future or through refunds from the plan. There are no other critical areas of judgement.

Agency arrangements

The Academy Trust acts as an agent in distributing 16-19 bursary funds from DfE. Payments received from DfE and subsequent disbursements to students are excluded from the statement of financial activities as the Academy Trust does not have control over the charitable application of the funds. The funds received and paid and any balances held are disclosed in the notes to the financial statements.

2 Donations and capital grants

	Unrestricted funds £	Restricted funds £	2024/25 Total £	2023/24 Total £
Capital grants	-	24,959	24,959	25,265
Other donations	29,680	6,071	35,751	55,686
	<u>29,680</u>	<u>31,030</u>	<u>60,710</u>	<u>80,951</u>
Total 2024	<u>18,246</u>	<u>62,705</u>	<u>80,951</u>	

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

3 Funding for the Academy Trust's educational operations

	Unrestricted funds £	Restricted funds £	2024/25 Total £	2023/24 Total £
DfE grants				
General Annual Grant (GAG)	-	4,736,050	4,736,050	4,486,275
16-19 core education funding	-	1,740,542	1,740,542	1,729,681
Pupil Premium	-	67,490	67,490	68,940
Rates reclaim	-	30,786	30,786	28,672
Mainstream schools additional grant	-	-	-	148,465
Teachers' pay grant	-	76,342	76,342	76,137
Teachers' pension grant	-	204,931	204,931	127,670
Core schools budget grant	-	227,967	227,967	-
National insurance contributions grant	-	25,403	25,403	-
Other DfE grants	-	143,576	143,576	156,962
	-	7,253,087	7,253,087	6,822,802
Other government grants				
Local authority grants	-	69,224	69,224	59,092
Other income from the Academy Trust's educational operations				
Trip income	-	384,614	384,614	433,551
Other income	-	114,641	114,641	13,548
	-	499,255	499,255	447,099
	-	7,821,566	7,821,566	7,328,993
Total 2024	-	7,328,993	7,328,993	

4 Other trading activities

	Unrestricted funds £	Restricted funds £	2024/25 Total £	2023/24 Total £
Hire of facilities	25,991	11,335	37,326	31,221
Sale of educational supplies	3,044	-	3,044	3,152
Other trading income	199,613	-	199,613	47,836
	228,648	11,335	239,983	82,209
Total 2024	71,565	10,644	82,209	

Included within 'Other trading income' includes £157k of insurance claims for costs which are included within legal fees and premises costs.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

5 Investment income

	Unrestricted funds	Restricted funds	2024/25 Total	2023/24 Total
	£	£	£	£
Short term deposits	51,105	-	51,105	37,924
Total 2024	37,924	-	37,924	

6 Expenditure

	Staff costs	Non Pay Expenditure		Total 2024/25	Total 2023/24
	£	Premises	Other	£	£
	£	£	£	£	£
Academy's educational operations:					
Direct costs	5,262,497	-	1,034,078	6,296,575	5,958,617
Allocated support costs	962,467	574,169	506,081	2,042,717	1,871,468
	6,224,964	574,169	1,540,159	8,339,292	7,830,085
Total 2024	5,877,858	545,918	1,406,309	7,830,085	

Net income/(expenditure) for the period includes:

	2024/25	2023/24
	£	£
Operating lease rentals	11,075	11,106
Depreciation	211,565	220,272
(Gain)/loss on disposal of fixed assets	-	43,328
Fees payable to auditor for:		
Audit	10,500	10,120
Other services	4,975	4,755

Included within expenditure are the following transactions:

	Total	Individual items above £5,000	
	£	Amount	Reason
	£	£	
Gifts made by the Academy Trust	133	-	-

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

7 Charitable activities

	2024/25	2023/24
	Total	Total
	£	£
Direct costs – educational operations	6,296,575	5,958,617
Support costs – educational operations	2,042,717	1,871,468
	<u>8,339,292</u>	<u>7,830,085</u>

Analysis of support costs:

	Educational operations	2024/25	2023/24
		Total	Total
	£	£	£
Support staff costs	962,467	962,467	950,276
Depreciation	39,873	39,873	49,104
Technology costs	138,096	138,096	145,278
Premises costs	574,169	574,169	545,918
Legal costs - other	87,152	87,152	8,024
Other support costs	218,692	218,692	145,765
Governance costs	22,268	22,268	27,103
Total support costs	<u>2,042,717</u>	<u>2,042,717</u>	<u>1,871,468</u>
Total 2024		<u>1,871,468</u>	<u>1,871,468</u>

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

8 Staff

a) Staff costs and employee benefits

Staff costs during the period were:

	2024/25	2023/24
	£	£
Wages and salaries	4,534,318	4,380,385
Social security costs	510,679	447,484
Pension costs	1,179,967	1,049,989
	<u>6,224,964</u>	<u>5,877,858</u>

b) Staff numbers

The average number of persons employed by the Academy Trust during the year was as follows:

	2024/25	2023/24
	No.	No.
Teachers	75	76
Administration and support	63	59
Management	7	6
	<u>145</u>	<u>141</u>

c) Higher paid staff

The number of employees whose employee benefits (excluding employer pension costs and employer national insurance contributions) exceeded £60,000 was:

	2024/25	2023/24
	No.	No.
£60,001 - £70,000	5	3
£70,001 - £80,000	4	1
£120,001 - £130,000	1	1

d) Key management personnel

The key management personnel of the Academy Trust comprise the Trustees and the senior management team as listed on page 1. The total amount of employee benefits (including employer pension contributions and employer national insurance contributions) received by key management personnel for their services to the Academy Trust was £746,598 (2024: £639,417).

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

9 Related Party Transactions – Trustees' remuneration and expenses

One or more Trustees has been paid remuneration or has received other benefits from employment with the Academy Trust. Remuneration is only paid in respect of services provided undertaking staff roles under contracts of employment.

The value of Trustees' remuneration and other benefits was as follows:

		2024/25 £000	2023/24 £000
M Chilcott (Principal and staff trustee)	Remuneration	-	120-125
	Employer's pension contributions paid	-	30-35
A Smith (Staff trustee)	Remuneration	120-125	-
	Employer's pension contributions paid	30-35	-
S Hackett (Staff trustee)	Remuneration	60-65	55-60
	Employer's pension contributions paid	15-20	10-15
A Raworth (Staff trustee)	Remuneration	10-15	10-15
	Employer's pension contributions paid	0-5	0-5

During the period ended 31 August 2025, no Trustees received any reimbursement of expenses (2024: none).

10 Trustees' and officers' insurance

The Academy Trust has opted into the Department for Education's risk protection arrangement (RPA), an alternative to insurance where UK government funds cover losses that arise. This scheme protects trustees and officers from claims arising from negligent acts, errors or omissions occurring whilst on academy business, and provides cover up to £10m. It is not possible to quantify the Trustees and officers indemnity element from the overall cost of the RPA scheme.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

11 Tangible fixed assets

	Freehold Land and Buildings £	Assets Under Con- struction £	Plant and Machinery £	Computer Equipment £	Motor Vehicles £	Total £
Cost						
At 1 September 2024	10,864,181	-	257,692	351,273	17,650	11,490,796
Additions	21,664	215,656	75,209	169,216	-	481,745
Disposals	-	-	(98,922)	(25,068)	-	(123,990)
At 31 August 2025	10,885,845	215,656	233,979	495,421	17,650	11,848,551
Depreciation						
At 1 September 2024	2,207,366	-	197,794	160,944	17,650	2,583,754
Charged in year	171,692	-	15,006	24,867	-	211,565
Disposals	-	-	(98,922)	(25,068)	-	(123,990)
At 31 August 2025	2,379,058	-	113,878	160,743	17,650	2,671,329
Net book values						
At 31 August 2024	8,656,815	-	59,898	190,329	-	8,907,042
At 31 August 2025	8,506,787	215,656	120,101	334,678	-	9,177,222

12 Debtors

	2024/25 £	2023/24 £
Trade debtors	1,815	-
VAT recoverable	115,510	90,475
Prepayments and accrued income	272,381	207,241
	<u>389,706</u>	<u>297,716</u>

13 Current asset investments

	2024/25 £	2023/24 £
Bank deposits	<u>521,787</u>	<u>504,567</u>

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

14 Creditors: amounts falling due within one year

	2024/25	2023/24
	£	£
Trade creditors	369,368	248,861
Other taxation and social security	111,087	97,973
Other creditors falling due within one year	167,428	131,499
Accruals and deferred income	325,643	217,561
	<u>973,526</u>	<u>695,894</u>

	2024/25	2023/24
	£	£
Deferred income at 1 September 2024	111,583	87,097
Released from previous years	(111,583)	(87,097)
Resources deferred in the year	90,590	111,583
Deferred income at 31 August 2025	<u>90,590</u>	<u>111,583</u>

At the balance sheet date the Academy Trust was holding funds received in advance for trips occurring in the forthcoming financial year.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

15 Funds

	Balance at 1 September 2024 £	Income £	Expenditure £	Transfers £	Gains and losses £	Balance at 31 August 2025 £
Restricted general funds						
General Annual Grant (GAG)	-	4,736,050	(5,108,879)	372,829	-	-
16-19 core education funding	-	1,740,542	(1,740,542)	-	-	-
Pupil premium	-	67,490	(67,490)	-	-	-
Rates reclaim	-	30,786	(30,786)	-	-	-
Teachers' pay grant	-	76,342	(76,342)	-	-	-
Teachers' pension grant	-	204,931	(204,931)	-	-	-
Core schools budget grant	-	227,967	(227,967)	-	-	-
NICs grant	-	25,403	(25,403)	-	-	-
Other DfE grants	-	143,576	(143,576)	-	-	-
Local authority grants	-	69,224	(69,224)	-	-	-
Track maintenance fund	41,394	11,335	(12,261)	-	-	40,468
Other educational activities	-	505,326	(505,326)	-	-	-
	41,394	7,838,972	(8,212,727)	372,829	-	40,468
Pension reserve	-	-	85,000	-	(85,000)	-
	41,394	7,838,972	(8,127,727)	372,829	(85,000)	40,468
Restricted fixed asset funds						
Fixed asset fund	8,907,042	-	(211,565)	481,745	-	9,177,222
DfE capital grants (DFC)	-	24,959	-	(24,959)	-	-
	8,907,042	24,959	(211,565)	456,786	-	9,177,222
Total restricted funds	8,948,436	7,863,931	(8,339,292)	829,615	(85,000)	9,217,690
Total unrestricted funds	1,880,407	309,433	-	(829,615)	-	1,360,225
Total funds	10,828,843	8,173,364	(8,339,292)	-	(85,000)	10,577,915

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

15 Funds (continued)

Under the funding agreement with the Secretary of State, the Academy Trust was not subject to a limit on the amount of GAG that it could carry forward at 31 August 2025.

The specific purposes for which the funds are to be applied are as follows:

General annual grant

This includes all funding received from the DfE to carry out the objectives of the Academy Trust. It includes the school budget share; minimum funding guarantee; education services grant; insurance; rates; and pre-16 high needs funding streams.

Core Schools Budget Grant (CSBG)

This represents additional funding received from the DfE to support the Academy Trust with its overall costs.

National Insurance contributions (NICs) grant

This represents additional funding received from the DfE to support the Academy Trust with its additional costs arising from the increase in national insurance contribution rates.

Other DfE grants

This is funding received from the DfE for specific purposes.

Local authority grants

This is funding received from the local authority for specific purposes, for example Special Educational Needs funding.

Other educational activities

This includes all other educational income/expenditure.

Pension reserve

This represents the negative reserve in respect of the liability on the LGPS pension scheme which was transferred to the Academy Trust on conversion. As at 31 August 2025 the Academy Trust's share of the net assets in the scheme is now in surplus, but, as no pension asset has been recognised, the balance on the reserve is £nil.

Fixed asset fund

The fund includes the value of the tangible fixed assets of the academy on conversion, and amounts transferred from GAG or other restricted funds specifically for expenditure on tangible fixed assets, and the annual charges for depreciation of these assets.

DfE capital grants

This is funding received from the DfE specifically for expenditure on capital improvements.

Transfers between funds

Transfers to the restricted fixed asset fund represent the cost of fixed asset additions which have been funded from restricted or unrestricted general funds.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

15 Funds (continued)

Comparative information in respect of the preceding period is as follows:

	Balance at 1 September 2023 £	Income £	Expenditure £	Transfers £	Gains and losses £	Balance at 31 August 2024 £
Restricted general funds						
General Annual Grant (GAG)	161,781	4,486,275	(4,737,077)	89,021	-	-
16-19 core education funding	-	1,729,681	(1,729,681)	-	-	-
Pupil premium	-	68,940	(68,940)	-	-	-
Rates reclaim	-	28,672	(28,672)	-	-	-
MSAG	-	148,465	(148,465)	-	-	-
Teachers' pay grant	-	76,137	(76,137)	-	-	-
Teachers' pension grant	-	127,670	(127,670)	-	-	-
Other DfE grants	10,000	156,962	(166,962)	-	-	-
Local authority grants	-	48,448	(48,448)	-	-	-
Track maintenance fund	34,000	10,644	(3,250)	-	-	41,394
Other educational activities	-	495,183	(495,183)	-	-	-
	205,781	7,377,077	(7,630,485)	89,021	-	41,394
Pension reserve	-	-	64,000	-	(64,000)	-
	205,781	7,377,077	(7,566,485)	89,021	(64,000)	41,394
Restricted fixed asset funds						
Fixed asset fund	8,905,108	-	(263,600)	265,534	-	8,907,042
DfE capital grants (DFC)	14,193	25,265	-	(39,458)	-	-
	8,919,301	25,265	(263,600)	226,076	-	8,907,042
Total restricted funds	9,125,082	7,402,342	(7,830,085)	315,097	(64,000)	8,948,436
Total unrestricted funds	2,067,769	127,735	-	(315,097)	-	1,880,407
Total funds	11,192,851	7,530,077	(7,830,085)	-	(64,000)	10,828,843

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

16 Analysis of net assets between funds

	Un-restricted funds	Restricted general funds	Restricted pension funds	Restricted fixed asset funds	Total funds
	£	£	£	£	£
Tangible fixed assets	-	-	-	9,177,222	9,177,222
Current assets	1,360,225	1,013,994	-	-	2,374,219
Current liabilities	-	(973,526)	-	-	(973,526)
Total net assets	1,360,225	40,468	-	9,177,222	10,577,915

Comparative information in respect of the preceding period is as follows:

	Un-restricted funds	Restricted general funds	Restricted pension funds	Restricted fixed asset funds	Total funds
	£	£	£	£	£
Tangible fixed assets	-	-	-	8,907,042	8,907,042
Current assets	1,880,407	737,288	-	-	2,617,695
Current liabilities	-	(695,894)	-	-	(695,894)
Total net assets	1,880,407	41,394	-	8,907,042	10,828,843

17 Long-term commitments, including operating leases

Operating leases

At 31 August 2025 the total of the Academy Trust's future minimum lease payments under non-cancellable operating leases was:

	2024/25	2023/24
	£	£
Amounts due within one year	5,304	11,075
Amounts due between one and five years	-	5,304
	<u>5,304</u>	<u>16,379</u>

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

18 Reconciliation of net income/(expenditure) to net cash flow from operating activities

	2024/25	2023/24
	£	£
Net expenditure for the reporting period	(165,928)	(300,008)
Adjusted for:		
Depreciation	211,565	220,272
(Gain)/loss on disposal of fixed assets	-	43,328
Capital grants from DfE and other capital income	(24,959)	(25,265)
Interest receivable	(51,105)	(37,924)
Defined benefit pension scheme cost less contributions payable	(60,000)	(47,000)
Defined benefit pension scheme finance cost	(25,000)	(17,000)
Increase in debtors	(91,990)	(122,176)
Increase in creditors	343,640	158,216
Net cash provided by / (used in) Operating Activities	<u>136,223</u>	<u>(127,557)</u>

19 Cash flows from investing activities

	2024/25	2023/24
	£	£
Dividends, interest and rents from investments	51,105	37,924
Increase in current asset investments	(17,220)	(504,567)
Purchase of tangible fixed assets	(547,753)	(199,526)
Capital grants from DfE Group	24,959	25,265
Net cash used in investing activities	<u>(488,909)</u>	<u>(640,904)</u>

20 Analysis of cash and cash equivalents

	2024/25	2023/24
	£	£
Cash at bank and in hand	<u>1,462,726</u>	<u>1,815,412</u>

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

21 Analysis of changes in net debt

	At 1 September 2024 £	Cash flows £	Acquisition/ disposal of subsidiaries £	New finance leases £	Other non-cash changes £	At 31 August 2025 £
Cash	1,815,412	(352,686)	-	-	-	1,462,726
Total	1,815,412	(352,686)	-	-	-	1,462,726

22 Member liability

Each member of the charitable company undertakes to contribute to the assets of the company in the event of it being wound up while he/she is a member, or within one year after he/she ceases to be a member, such amount as may be required, not exceeding £10 for the debts and liabilities contracted before he/she ceases to be a member.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

23 Pension and similar obligations

The Academy Trust's employees belong to two principal pension schemes: the Teachers' Pension Scheme England and Wales (TPS) for academic and related staff; and the Local Government Pension Scheme (LGPS) for non-teaching staff, which is managed by Wiltshire Council. Both are multi-employer defined benefit schemes.

The latest actuarial valuation of the TPS related to the period ended 31 March 2020 and of the LGPS 31 March 2022.

Contributions amounting to £139,882 were payable to the schemes at 31 August 2025 (2024: £128,379) and are included within creditors.

Teachers' Pension Scheme

The Teachers' Pension Scheme (TPS) is a statutory, contributory, defined benefit scheme, governed by the Teachers' Pension Scheme Regulations 2014. Membership is automatic for teachers in academies. All teachers have the option to opt-out of the TPS following enrolment.

The TPS is an unfunded scheme to which both the member and employer makes contributions, as a percentage of salary - these contributions are credited to the Exchequer. Retirement and other pension benefits are paid by public funds provided by Parliament.

Valuation of the Teachers' Pension Scheme

The Government Actuary, using normal actuarial principles, conducts a formal actuarial review of the TPS in accordance with the Public Service Pensions (Valuations and Employer Cost Cap) Directions 2014 published by HM Treasury every four years. The aim of the review is to ensure scheme costs are recognised and managed appropriately and the review specifies the level of future contributions.

Actuarial scheme valuations are dependent on assumptions about the value of future costs, design of benefits and many other factors. The latest actuarial valuation of the TPS was carried out as at 31 March 2020. The valuation report was published by the Department for Education on 27 October 2023, with the SCAPE rate, set by HMT, applying a notional investment return based on 1.7% above the rate of CPI. The key elements of the valuation outcome are:

- Employer contribution rates set at 28.68% of pensionable pay (including a 0.08% administration levy). This is an increase of 5% in employer contributions and the cost control result is such that no change in member benefits is needed.
- Total scheme liabilities (pensions currently in payment and the estimated cost of future benefits) for service to the effective date of £262,000 million and notional assets (estimated future contributions together with the notional investments held at the valuation date) of £222,200 million, giving a notional past service deficit of £39,800 million.

The result of this valuation has been implemented from 1 April 2024. The next valuation result is due to be implemented from 1 April 2027.

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

23 Pension and similar obligations (continued)

The employer's pension costs paid to TPS in the period amounted to £992,127 (2024: £852,066).

A copy of the valuation report and supporting documentation is on the Teachers' Pensions website.

Under the definitions set out in FRS 102, the TPS is an unfunded multi-employer pension scheme. The Academy Trust is unable to identify its share of the underlying assets and liabilities of the plan. Accordingly, the Academy Trust has taken advantage of the exemption in FRS 102 and has accounted for its contributions to the scheme as if it were a defined contribution scheme. The Academy Trust has set out above the information available on the scheme.

Local Government Pension Scheme

The LGPS is a funded defined benefit pension scheme, with the assets held in separate trustee-administered funds. The total contribution made for the year ended 31 August 2025 was £303,000 (2024: £302,000), of which employer's contributions totalled £244,000 (2024: £243,000) and employees' contributions totalled £59,000 (2024: £59,000). The agreed contribution rates for future years are 25.3% for employers and 5.5% to 12.5% for employees.

Parliament has agreed, at the request of the Secretary of State for Education, to a guarantee that, in the event of an academy trust closure, outstanding Local Government Pension Scheme liabilities would be met by the Department for Education. The guarantee came into force on 18 July 2013 and on 21 July 2022, the Department for Education reaffirmed its commitment to the guarantee, with a parliamentary minute published on GOV.UK.

Principal actuarial assumptions

	2025	2024
Rate of increase in salaries	3.1%	3.2%
Rate of increase for pensions in payment/inflation	2.6%	2.7%
Discount rate for scheme liabilities	6.1%	5.0%
Inflation assumption (CPI)	2.6%	2.7%
Commutation of pensions to lump sums	0.0%	50.0%

The current mortality assumptions include sufficient allowance for future improvements in mortality rates. The assumed life expectations on retirement age 65 are:

	2025	2024
Retiring today		
Males	21.6	21.8
Females	24.2	24.4
Retiring in 20 years		
Males	22.2	21.2
Females	25.4	25.7

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

23 Pension and similar obligations (continued)

Sensitivity analysis

	Increase/(reduction) in defined benefit obligation	
	2025	2024
	£	£
Discount rate +0.1%	(60,000)	(90,000)
Discount rate -0.1%	61,000	90,000
Mortality assumption – 1 year increase	84,000	159,000
Mortality assumption – 1 year decrease	(82,000)	(159,000)
CPI rate +0.1%	62,000	89,000
CPI rate -0.1%	(61,000)	(89,000)

The Academy Trust's share of the assets in the scheme were:

	2025	2024
	£	£
Equities	1,427,000	1,670,000
Gilts	1,121,000	1,154,000
Property	714,000	955,000
Cash and other liquid assets	136,000	199,000
Total market value of assets	3,398,000	3,978,000

The actual return on scheme assets was a gain of £264,000 (2024: £32,000).

Amount recognised in the Statement of Financial Activities

	2024/25	2023/24
	£	£
Current service cost	184,000	196,000
Interest income	(222,000)	(208,000)
Interest cost	197,000	191,000
Total amount recognised in the SOFA	159,000	179,000

South Wilts Grammar School

Notes to the Financial Statements for the Year Ended 31 August 2025

23 Pension and similar obligations (continued)

Changes in the present value of defined benefit obligations were as follows:

	2024/25	2023/24
	£	£
At 1 September	3,978,000	3,829,000
Current service cost	184,000	196,000
Interest cost	197,000	191,000
Employee contributions	59,000	59,000
Actuarial gain	(875,000)	(324,000)
Benefits paid	(145,000)	27,000
At 31 August	<u>3,398,000</u>	<u>3,978,000</u>

Changes in the fair value of Academy Trust's share of scheme assets:

	2024/25	2023/24
	£	£
At 1 September	3,978,000	3,829,000
Interest income	222,000	208,000
Actuarial loss	(960,000)	(388,000)
Employer contributions	244,000	243,000
Employee contributions	59,000	59,000
Benefits paid	(145,000)	27,000
At 31 August	<u>3,398,000</u>	<u>3,978,000</u>

A defined benefit plan asset of £1,514,000 (2024: £512,000) has not been recognised as the Academy Trust does not expect to be able to recover the surplus either through reduced contributions in the future or through refunds from the plan.

24 Related party transactions

No related party transactions took place in the period of account, other than certain Trustees' remuneration and expenses already disclosed in note 9.

25 Agency arrangements

The Academy Trust distributes 16-19 bursary funds to students as an agent for DfE. In the accounting period ending 31 August 2025 the Academy Trust received £25,917 and disbursed £38,773 from the fund. As at 31 August 2025, the cumulative unspent 16-19 bursary fund is £973, of which £nil relates to undistributed funding that is repayable to DfE. Comparatives for the accounting period ending 31 August 2024 are £28,409 received, £14,580 disbursed, total cumulative unspent fund of £13,829 of which £nil was repayable to DfE.