



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 06/04/21 (Period start date) To 05/04/2022 (Period end date)

Charity name: The Helen Bailey Trust

Charity registration number: 1176443

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The advancement of education by supporting and encouraging creative writing by children in schools and other education establishments, in particular, but not exclusively, in the North East of England.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>The Trustees focus on providing grants to schools and other education establishments or charitable organisations that support the objects of the charity working in the areas mentioned above.</p> <p>The Trustees have determined that the priorities for funding will be charitable projects supporting:</p> <ul style="list-style-type: none">• Encouraging children of School Years 5 and above at school in the North East of England, to see themselves as writers by discovering and exploring creative writing; and• Disseminating good practice in the teaching of creative writing in schools and other education establishments.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees consider that in funding any charitable project they have complied with, and taken due regard of, the Charity Commission's public benefit guidance when exercising any powers or duties to which that guidance is relevant.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<p>The Trustees have developed, agreed and implemented a policy on grant making.</p> <p>Such grants are provided at the complete discretion of the Trustees who will judge applications on the following criteria:</p> <ul style="list-style-type: none">• Complying with the status of the objects of the Charity;• Taking a fresh and imaginative approach;• Being realistic and practicable;• Going beyond the limits of the everyday curriculum;• Encouraging young persons to see themselves as creative writers; and• Including routes to share good practice with a wide audience.
Policy on social investment including program related investment	Para 1.38	-
Contribution made by volunteers	Para 1.38	-
Other		-

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>In recognising the importance of 'on the ground' expertise when working in this field, The Helen Bailey Trust continues to work in partnership with Seven Stories (The National Centre for Children's Books) a registered charity whose mission is to collect, champion and celebrate children's literature.</p> <p>The principles and primary objectives of this ongoing and successful partnership are to deliver innovative learning programmes that inspire and enable young people and their teachers in the North East of England to take diverse approaches to creative writing by sparking empathy with the creative process, develop increased confidence, imagination and stamina in creative writing and to enable them to begin to see themselves as writers.</p> <p>Following discussions between Seven Stories and the Trustees of The Helen Bailey Trust, it was agreed to support Welbeck Academy (located in Walker in the East End of Newcastle upon Tyne) with programmes which were then developed and delivered by Seven Stories.</p> <p>The objectives and activities undertaken during the autumn and spring terms of the 2020/21 academic year were outlined in the Trustees annual report for that period, however as the summer term of that programme falls within the current reporting period we outline the activities undertaken in it below.</p> <p>This term focused on the topic of poetry with the pupils making their own 'pop-up' poetry notebooks (as inspired by the British Library's programme 'Discovering Children's Books') which they filled with their own poems and read aloud in different voices, tones, pace and pitch. They also used the technique of personification to write animal poems which they engaged with enthusiastically.</p> <p>...cont/</p>

Pupils studied a poetry note written by author James Berry which was held in the Seven Stories Collection and they discussed the crossings out and changes that had been made and how authors often change their ideas when writing. Pupils were encouraged to think of a location or landmark important to them and to use it to inspire them to create a poem shaped from it.

Dialect poetry was explored through the work of Caribbean poet Valerie Bloom which helped them understand that oral dialect is sometimes easier to understand than in its written form and they applied this to elements of the Geordie dialect and Arabic language in their poetry.

Pupils engaged with author M.G. Leonard and asked her questions about her new book, *Twitch*.

In the final poetry themed sessions, pupils were asked to choose their favourite poem from their poetry notebooks and to consider how they could improve upon it if they were to write it again. The poems were collected into a poetry anthology for each class to celebrate the creative writing they had completed during the term.

Pupils then considered 'where stories come from' and studied seven basic plot types, matching book titles to corresponding plot types including multiple plot types, creating their own eighth type and thinking about books that would be a good fit with it.

Due to Covid-19 restrictions, the end of programme celebration event had to be organised with this in mind and consisted of three smaller events (rather than one large one), highlighting and showcasing the best elements of the programme. The events included a 'virtual' tour of the Seven Stories Collection, a live creative workshop with author Christopher Edge and a final virtual celebratory event sharing their poems, discussing their favourite sessions during the programme, favourite author events and taking part in games and fun writing activities.

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Teachers reported that around 54 pupils (across three classes) attended the Seven Stories sessions each week. They also observed that the pupils enjoyed the sessions, responding well to them and as a result were more eager to read and write and be creative.

The restrictions imposed by the pandemic were a challenge to all but the teachers and pupils of Welbeck Academy showed great resilience and were genuinely happy to be taking part in the sessions and demonstrated great engagement and effort to undertake tasks that were unfamiliar to them.

As a result of this positive outcome, The Helen Bailey Trust committed to fund a further Reader in Residence programme from 2021 through to 2022, again supporting Welbeck Academy.

Priority approaches for this latest programme included:

- Delivering an innovative learning programme that inspired young people in the North East of England and their teachers with a diverse approach to creative writing;
- Sparking young people's empathy with the creative process and enable them to see themselves as writers; and
- Using the unique Seven Stories collection, expert practitioners and contacts within the creative professions to give young people and their teachers a deeper understanding of the thoughts and ideas that shape an author's storytelling and encouraging their free thinking by inviting them to explore personal, social, civic and environmental questions of relevance to them.

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In the autumn term a creative associate held 'in school' workshops to explore with pupils the artwork of Tony Ross with pupils selecting their favourites from *Horrid Henry* and *Horrid Henry Tricks the Tooth Fairy* for display in the gallery at the Seven Stories visitor centre. Pupils were able to handle the original artwork during a 'white glove' experience and look more closely and in depth at each piece, writing accompanying labels to share their reasons for selecting particular illustrations and designing interactive elements for inclusion within the display, a selection of which were implemented by the exhibition staff.

When the installation of the exhibition had been completed, pupils visited to see everything they had co-curated and displayed and staff found it particularly memorable to see the faces of pupils recognising the fruits of their own work.

In the spring term pupils visited and explored parts of the Seven Stories collection to inspire them to 'think of themselves as writers' and to develop confidence in creative writing. The concept of 'nothing starts finished' by exploring the imperfect process of scribbling, doodling and note crossing outs from authors and illustrators who used a multitude of different materials to 'make their marks' from the Seven Stories archive including the production of storyboards.

Pupils then created their own storyboards as part of the creative process of producing their own miniature books which also included writing, illustrating and designing front and back covers by reference to published books and understanding what the ISBN numbers meant on the back covers.

A sharing event was organised for the end of term to share with the wider school community the delightful stories from the miniature books that they had created alongside explanatory labels. This was held in an exhibition in the school hall with some pupils reading their stories aloud and approximately 60 grandparents, parents and siblings attending.

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		<p>The Trustees have been delighted with the positive achievements these ongoing programmes have achieved and look forward to a continued and valued partnership between Seven Stories and The Helen Bailey Trust.</p> <p>Conclusions drawn from the 2021/22 programme (including activities undertaken in the final summer term) will be included in the Annual Report for the 2022/23 period.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	-
Performance of fundraising activities against objectives set	Para 1.41	-
Investment performance against objectives	Para 1.41	-
Other		-

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The charity retained sufficient funds to meet all current and anticipated future expenditure on an ongoing basis.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The charity does not have a policy on reserves (see below).
Amount of reserves held	Para 1.22	None.
Reasons for holding zero reserves	Para 1.22	The charity is run on a purely voluntary basis, it does not therefore have a policy on reserves as the Trustees retain sufficient cash funds on deposit to cover the minimal running costs and its grant making activities.
Details of fund materially in deficit	Para 1.24	-
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	-

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	-
Investment policy and objectives including any social investment policy adopted	Para 1.46	-
A description of the principal risks facing the charity	Para 1.46	-
Other		-

Structure, Governance and Management

Description of charity's trusts:

Type of governing document (trust deed, royal charter)	Para 1.25	Constitution.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation (CIO).
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	New Trustees are selected by the existing Trustees.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	-
The charity's organisational structure and any wider network with which the charity works	Para 1.51	-
Relationship with any related parties	Para 1.51	-
Other		-

Reference and Administrative details

Charity name	The Helen Bailey Trust
Other name the charity uses	-
Registered charity number	1176443
Charity's principal address	PO Box 73650 London SW8 9EN

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	John Charles Bailey	-	-	-
2	Rev. Fraser Colin Dyer	-	-	-
3	Geoffrey John Court	-	-	-
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18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		
-		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
-	-	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None.
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	-
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	-

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
-	-	-

Name of chief executive or names of senior staff members (Optional information)

-

Exemptions from disclosure

Reason for non-disclosure of key personnel details

-


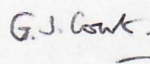
Other optional information

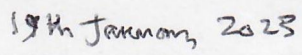
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Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	John Charles Bailey	Geoffrey John Court
Position (eg Secretary, Chair, etc)	Trustee	Trustee

Date 



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
The Helen Bailey Trust

No (if any)
1176443

Receipts and payments accounts

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For the period from	Period start date 06/04/2021	To	Period end date 05/04/2022
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Section A Receipts and payments


	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations, legacies and grants	9,226	-	-	9,226	-
Dividends from investments - managed investment portfolio	6,327	-	-	6,327	4,534
Accrued interest - managed investment portfolio	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	15,553	-	-	15,553	4,534
A2 Asset and investment sales, (see table).					
Receipts from sale of investments - managed investment portfolio	105,278	-	-	105,278	94,916
	-	-	-	-	-
Sub total	105,278	-	-	105,278	94,916
Total receipts	120,831	-	-	120,831	99,450
A3 Payments					
Internet and postal service charges	432	-	-	432	424
Travel to and from meetings	-	-	-	-	-
Grants and donations paid	13,400	-	-	13,400	5,200
Bank charges	96	-	-	96	69
Investment management costs	2,035	-	-	2,035	1,850
Other miscellaneous expenditure	-	-	-	-	-
Professional fees	-	-	-	-	-
	-	-	-	-	-
Sub total	15,963	-	-	15,963	7,543
A4 Asset and investment purchases, (see table)					
Purchase of investments - managed investment portfolio	104,128	-	-	104,128	83,345
	-	-	-	-	-
Sub total	104,128	-	-	104,128	83,345
Total payments	120,091	-	-	120,091	90,888
Net of receipts/(payments)	740	-	-	740	8,562
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	32,536	-	-	32,536	23,974
Cash funds this year end	33,276	-	-	33,276	32,536

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Held in bank current account	2,953	-	-
	Held in managed investment portfolio	30,324	-	-
		-	-	-
	Total cash funds	33,276	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	None	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Equities and Fixed Income Bonds - managed investment portfolio	Unrestricted	195,112	196,156
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	None		-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	None		-	
			-	
			-	
			-	
			-	

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
None		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
None		-	
		-	
		-	
		-	
		-	

Signature	Print Name	Date of approval
	John Charles Bailey	17/1/23
Geoffrey John Court	Geoffrey John Court	19/1/23