

Company Registration Number: 07825848 (England & Wales)

**Conisbrough Ivanhoe Primary Academy**  
**(A company limited by guarantee)**

**ANNUAL REPORT AND FINANCIAL STATEMENTS**

**FOR THE YEAR ENDED 31 AUGUST 2022**

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**CONISBROUGH IVANHOE PRIMARY ACADEMY****(A company limited by guarantee)**

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**REFERENCE AND ADMINISTRATIVE DETAILS**

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| <b>Members</b>                         | Mr B M Garforth (appointed 1 March 2022)<br>Mrs C Lee<br>Mrs P A Lloyd-Rees (appointed 3 February 2022)<br>Mr M Taylor<br>Mrs J Toller  |
| <b>Trustees</b>                        | Mr J P Brian, Accounting Officer / Headteacher<br>Mrs S Broadhead (appointed 13 July 2022)<br>Ms L V Fletcher (resigned 8 March 2022)<br>Mrs K Hutton (appointed 9 November 2022)<br>Dr M Lawson (appointed 6 March 2022)<br>Mrs C Lee, Chair<br>Ms R Lockwood<br>Mrs R Matthews, Staff Trustee (resigned 21 October 2022)<br>Miss C Moxon (appointed 9 November 2022)<br>Mr A Nixon, Vice Chair<br>Ms A Parveen (appointed 8 March 2022)<br>Mr C Price (appointed 6 March 2022)<br>Mr L Richards (appointed 6 March 2022)<br>Mrs V Sedgwick, Staff Trustee (resigned 31 August 2022)<br>Miss R Simpson (appointed 1 February 2022)<br>Mrs R Stocks (resigned 5 March 2022)<br>Mr M Taylor<br>Mrs J Toller, Vice Chair<br>Ms R Wesley (resigned 5 March 2022)<br>Ms K Winnell (appointed 10 May 2022) |
| <b>Company registered number</b>       | 07825848  |
| <b>Company name</b>                    | Conisbrough Ivanhoe Primary Academy   |
| <b>Principal and registered office</b> | Old Road<br>Conisbrough<br>Doncaster<br>South Yorkshire<br>DN12 3LR   |
| <b>Senior management team</b>          | Mr J P Brian, Headteacher<br>Miss F Denigan<br>Miss J Marriot<br>Mrs L Mills<br>Mrs J Noble<br>Mrs V Sedgwick<br>Mrs L Slater   |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
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REFERENCE AND ADMINISTRATIVE DETAILS (CONTINUED)  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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| <b>Independent auditors</b> | BHP LLP<br>2 Rutland Park<br>Sheffield<br>S10 2PD  |
| <b>Bankers</b>              | Lloyds Bank plc<br>55 High Street<br>Doncaster<br>South Yorkshire<br>DN1 1BH                 |
| <b>Solicitors</b>           | Paul Crowley & Co<br>Frank Crowley House<br>232 Breck Road<br>Anfield<br>Liverpool<br>L5 6SN |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**TRUSTEES' REPORT**  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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The Trustees present their annual report together with the financial statements and auditor's report of the charitable company for the period to 31 August 2022. The annual report serves the purposes of both a Trustees' report, and a Directors' report under company law.

The Trust operates an Academy for pupils aged 3 to 11 serving a catchment area in Conisbrough, Doncaster. The school had a roll of 344 (plus 39 nursery children) in the school census on 6 October 2022.

***Structure, governance and management***

***a. 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 Conisbrough Ivanhoe Primary Academy are also the Directors of the charitable company for the purposes of company law.

The charitable company is known as Conisbrough Ivanhoe Primary Academy.

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.

***b. 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.

***c. Trustees' indemnities***

The Academy Trust maintains Governors' and officers' liability insurance which gives appropriate cover for any legal action brought against its Governors. The Academy Trust has also granted indemnities to each of its Governors and other officers to the extent permitted by law. Qualifying third party indemnity provisions (as defined by section 234 of the Companies Act 2006) were in force during the period and remain in force, in relation to certain losses and liabilities which the Governors or other officers may incur to third parties in the course of acting as Governors or officers of the Academy Trust.

Details of the insurance cover are provided in note 12 to the financial statements.

**Structure, governance and management (continued)**

***d. Method of recruitment and appointment or election of Trustees***

The management of the Academy is the responsibility of the Trustees who are elected and co-opted under the terms of the Trust Deed.

The Academy recruits, appoints and elects Governors in compliance with the School Governance (Constitution) (England) Regulations 2007 in conjunction with Governance Support at Doncaster MBC.

***e. Policies adopted for the induction and training of Trustees***

The training and induction provided to new Governors depends on their existing experience and includes both educational and financial training. All Governors are encouraged to visit the Academy during the school day, meet staff and pupils and become familiar with the building, although this was not encouraged during the Covid-19 pandemic. Governors are either given hard copies of, or sign-posted to, all policies and procedures, minutes, financial statements, budgets and other documents needed in order to undertake their duties. Termly, Governors are made aware of and invited to, the Governors' Forum meetings/workshops provided by the Local Authority (Doncaster MBC).

***f. Organisational structure***

The Academy's unified management structure consists of two levels: the Governors and the Senior Leadership Team ("SLT").

The Governors are responsible for setting general policy, adopting an annual plan and budget setting. The Governors monitor the Academy by use of budgets and making appropriate decisions about the direction of the Academy, capital expenditure and staff appointments.

Membership of the SLT who served during the year are included in the Reference and Administrative Details on page 1. The SLT controls the Academy at an executive level, implementing the policies laid down by the Governors and reporting back to them. The Headteacher is responsible for the authorisation of spending within agreed budgets and the appointment of temporary staff. Budgetary control is devolved to the School Business Manager.

***g. Arrangements for setting pay and remuneration of key management personnel***

During the year, pay for key management personnel was set in line with the Trust's pay policy in conjunction with the School Teachers Pay & Conditions and the Green Book for non-teaching staff.

***h. Related parties and other connected charities and organisations***

The Academy links with many organisations to provide:

- Developing children, a love of life and a sense of responsibility for themselves and for their community;
- Schools Direct in conjunction with Sheffield Hallam University and Learners First;
- Student placements via various colleges and universities

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
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TRUSTEES' REPORT (CONTINUED)  
FOR THE YEAR ENDED 31 AUGUST 2022

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***Objectives and activities***

The principal objective and activity of the charitable company is the operation of Conisbrough Ivanhoe Primary Academy to provide education for pupils of different abilities between the ages of 3 and 11.

The main objectives of the Academy are:

- To raise achievement and aspirations for all through improved infrastructure, staffing and technology
- To help children take joy from everything they learn and to have care for their own health and well-being, to feel responsibility for the well-being of other people and to respect and love the world in which we all live
- To deliver a personalized curriculum which broadens children's experience whilst inspiring academy excellence
- To ensure that professional development of staff enables innovation and excellence within the learning infrastructure

***a. Objectives, strategies and activities***

The Academy is non-selective and offers all pupils a broad curriculum. The pupils who attend live mainly in Conisbrough, though some travel from further afield. The Academy runs a breakfast club, a tea club, a Wednesday afternoon club and offers 1:1 tuition to identified pupils. In addition, the Academy offers wrap around childcare to help keep children safe and provide a useful facility for parents. The Academy also offers activities and experiences beyond the academic, together with coaching in sports and a wide range of after-school clubs. The school enriches the lives of its pupils through frequent, heavily subsidised visits and other off-site and on-site activities throughout the year to broaden and deepen pupils' life experiences and to stimulate their imagination and learning.

***b. Public benefit***

In setting objectives and planning our activities, the Governors have given careful consideration to the Charity Commission's general guidelines on public benefit. We acknowledge, as Governors, that the Trust has complied with the Charity Commission's public benefit requirements during the period.

Stakeholders of the Academy regularly work together to raise funds for community inspired causes. Recipients include charities such as Children in Need, Red Nose Day, Macmillan Cancer Support, and World Mental Health Day.

**Fundraising**

Conisbrough Ivanhoe Primary Academy undertakes regular fundraising involving internal stakeholders only by inviting non-obligatory participation in functions such as pupil discos, non school uniform days, sponsored events and parent coffee mornings. However, again due to COVID-19, events inviting parents/carers into school, have been stopped.

Ivanhoe Academy does not engage with any professional fundraisers and conforms to recognized standards. Donations are direct to the Academy or via an online fundraising platform that the Academy oversees.

**Complaints**

Procedures are in place for senior management to investigate complaints and escalate to Governors, if necessary. Appeal procedures are also in place.

### ***Achievements and performance***

Ofsted rating: Good

Pupils do very well in the national assessments at the end of Key Stage 2, particularly in writing and mathematics. This helps to prepare them well for secondary school and beyond.

Teachers develop pupils' knowledge and skills well across a broad range of subjects. In mathematics, pupils revisit what they have learned often. For example, this means they can quickly recall number facts when needed.

Leaders prioritise the teaching of reading. Members of staff have a good understanding of how to teach early reading skills. Pupils get off to a good start in reading. Pupils read books that are closely matched to the sounds they have learned. As pupils move through the school, they learn to read fluently.

Leaders have adapted the curriculum so that pupils read high-quality literature more regularly. Pupils study a wide range of texts, from the tales of Beatrix Potter to the works of Shakespeare.

Pupils enjoy participating in a rich range of experiences. These include trips to the theatre, a stately home and an art museum.

Pupils are attentive and well behaved in lessons. They work hard and co-operate well with their peers. Children make a positive start to their education. They settle in quickly when they first start in school in the early years. Leaders and staff make sure that children learn and develop well in the Nursery and Reception classes. Children are happy and well cared for.

#### ***a. Key academic results of Conisbrough Ivanhoe Primary Academy***

Conisbrough Ivanhoe Primary Academy is continuing to thrive despite the issues of the past few years that all schools have faced. In terms of pupil numbers, we are continuing to grow with pupils on waiting lists for admission as well as other parents using the appeals process to find a place at this school. This is because we are a very popular and successful school – one that puts children first and puts excellent communications with parents at the heart of our mission.

All schools in the country are finding themselves squeezed in terms of budgets by the unfunded pay rises to staff as well as increases in energy costs. We have been fortunate in replacing heating, windows, roof and lighting at this school in the past few years and so we run efficiently, but we face a year where we will have probably to restructure to ensure that budgets are balanced as we go forward.

The school is subject to an Ntl due to two late financial submissions during Covid when we changed School Business Managers unexpectedly. The Ntl also highlighted shortcomings in some processes of governance when we had not kept up with all the changes in governance in the ten years since we became an academy. Currently, we work closely with Venn MAT to improve and re-organise the finances and have changed governance issues as requested. We anticipate that we will be looking increasingly to work with Venn MAT and there is the possibility that we might join the MAT if the relationship were to be successful.

Conisbrough Ivanhoe Primary Academy is a stand-alone academy and has been since January 2012. We were one of the first primary academies in Doncaster. Since 2006, we have more than doubled in size from 168 pupils (F2-Y6) to 344 pupils. In 2006, 14 pupils entered F2; in 2022, 56 pupils entered F2. In 2006, Ivanhoe was the smallest school in Conisbrough and now it is comfortably the largest (except for the secondary school.) We had a double classroom built in 2020 to accommodate F2 in order to free up space in the main body of the school - such is the demand for places.

### **Achievements and performance (continued)**

Ivanhoe out-performs all the other local schools academically. In 2017 and 2018, we were the best performing school in Doncaster and in the top 100 nationally in 2018.

In 2022, the school's results were as follows:

EYFSP - GLD: 53%, all ELGs: 67%, met literacy 57%, met maths 69%

Phonics - Year 1: 74% Y2:

#### Key Stage 1

Reading: PKS 10 (21%), WTS 9 (19%), EXS 24 (51%) GDS 4 (9%)

Writing: PKS 5 (11%), WTS 24 (51%), EXS 18 (38%) GDS 0

Maths: PKS 4 (9%), WTS 27 (57%), EXS 11 (23%) GDS 5 (11%)

Science: Has not met standard: 5 (11%) Has met standard: 42 (89%)

#### Key Stage 2 – Reading, writing TA and mathematics – attainment

Reading, writing TA and mathematics: percentage of pupils achieving the expected standard: 46%

Reading, writing TA and mathematics: percentage of pupils achieving a high score: 5%

Reading: percentage of pupils achieving expected standard: 53%

Reading: percentage of pupils achieving expected standard: 17%

Writing TA: percentage of pupils achieving expected standard: 54% (PKS 19%, WTS 27%)

Writing TA: percentage of pupils working at greater depth within expected standard: 12%

Mathematics: percentage of pupils achieving expected standard: 69%

Mathematics: percentage of pupils achieving a higher standard: 19%

Grammar, punctuation and spelling: percentage of pupils achieving expected standard: 63%

Grammar, punctuation and spelling: percentage of pupils achieving a higher standard: 24%

In terms of deprivation, Ivanhoe has fewer children in the bottom 10% in Indices of Multiple Deprivation than locally or nationally, but many more in the bottom 40% than locally or nationally. Indeed, 95% of Ivanhoe children are in the bottom 40%. There is exactly the same pattern in IDACI. A major difference lies in Education and Skills where 47% of Ivanhoe children are in the bottom 10% which is much higher than local or national figures. This mismatch is Ivanhoe's battleground in that Ivanhoe is a community where financial deprivation is less of an issue than educational deprivation which means that our task is always to promote the value of education above financial security... so, for example, our community can afford to take nice holidays and they like to do so in term time as that makes them more reasonably priced whereas we have to continuously press the argument that a child's education has more value than a foreign holiday.

The school has a good reputation for working closely with parents: every week, the homework front-page acts as a newsletter and we also use Class Dojo to communicate with parents as well on a day-to-day basis. Parents know that they can speak to members of staff or to the HT without an appointment – indeed, through Class Dojo, parents know they have access to the HT at any time, which often provides advice and reassurance that parents find very valuable. Prior to Coronavirus restrictions, parents were invited in to assemblies every week (Learner of the Week) and to a variety of workshops in KS1 and F1 and F2 for parents. In general, this relationship with parents is a great boost to the school (the good reputation of the school spread by parents is one of the reasons we have so many people applying to join the school at all key stages). During Lockdown, our parents were overwhelmingly supportive of the school - and the school, in return, had the highest percentage of attenders in Doncaster. Our attendance is always above the local and national average and a lot of this is down to the excellent relationship we have with parents and the school community.

Conisbrough is a troubled town in many ways and alcohol misuse, drug misuse, domestic violence and criminal gang

**TRUSTEES' REPORT (CONTINUED)**  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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**Achievements and performance (continued)**

membership are all issues that we have to deal with regularly - and of course, children are the collateral damage in these cases. At the same time, aspirational parents send their children to this school so there are often such huge differences within a class that we all have to be aware of. As part of our response to this, we have a full-time parent-liaison officer who has responsibility for safeguarding, and a member of staff (non-classroom based) who delivers very specific interventions. We also buy in Speech and Language services, Learning Support Services and extra Educational Psychology services so that we have a team whose focus is the most-needy children in the school (as well as SEN leader and another one in training.) Our response to meeting the needs of all children shows our commitment to all - a philosophy which runs through the whole school - other local schools tend to permanently exclude pupils, two of whom (both Y6) have then been 'allocated' to Ivanhoe where we have worked with them to give them the best opportunities to succeed and transition to secondary school. At the same time as recognising that there are children here with quite profound issues (physical, SEN as well as behavioural/emotional) I must stress that there is a wonderful atmosphere in this school where children are polite, hard-working, fun to be around, kind to each other, sensible and caring: that atmosphere is palpable and something that is always remarked upon by visitors to this school. We had a wonderful response from the parent of a child who had moved to Conisbrough from the Ukraine recently, before moving to a different part of Doncaster – she thanked us for the 'warm acceptance and friendly welcoming' and reported that her son had said, 'Ivanhoe was the best school ever! Let all schools be like this.' This is not unusual for the many children who join our school from other schools: we truly are a welcoming, friendly school.

At Ivanhoe, there is a strong sense of teamwork and staff are motivated by love of the school and their profession. The majority of teachers completed their ITT at this school, which helps to inculcate the sense of passion for the school and for the community. Our team of support staff is very committed and very skilled.

Ofsted reported in 2016 that "the support that pupils receive from teaching assistants is exceptional" which sums up our own view - they are a key ingredient in an extremely strong staff. There is a sense in this school that every member of staff has a voice that is heard and considered, it is as much a top down as a bottom up school where we all have responsibility for what happens and we are all accountable.

We are a very successful school - and a major factor in that success is that we constantly question ourselves and push the boundaries of what we can offer, always looking for ways that change can lead to improvement: a good example of that would be that when Ofsted visited in 2016, our SEN and Safeguarding was paper based, we relied on Doncaster for speech and language support and Educational Psychology support and any support in school was delivered by LSAs. Since then, we have moved to CPOMS, trained a new SEN (and are training another) moved Safeguarding to a full-time post and bought-in Speech and Language, Learning Support Services and Educational Psychology services (with a corresponding number of EHCPs granted) as well as having a member of staff solely dedicated towards support for the most needy children. This reinvention (in an area NOT highlighted by Ofsted) has transformed the way we meet the needs of our children. Our 2019 Ofsted visit arrived a bit early for us as we were still in the early stages of our new curriculum but we were still found to be Good - whatever that means. In 2022/23, we will be looking at using IT to move more of our hard copy online, which will be a focus for our SIP. This coincides with a new website, which we hope will be more user friendly, both for the school staff and the school community. This will also contribute towards the school being more sustainable – as well as keeping costs down.

We markedly changed our curriculum in response to Ofsted changes in 2019, completely rewriting it in 2018/19. We changed our day around to reflect the importance of the wider curriculum so that maths and English did not take priority in the school day. We introduced the concept of having 21 trips set in stone so that every child who has been through the school will have had 21 'essential' school trips (the list being developed by staff, students and parents) and we changed the school week around so that not only did children have slightly more school based learning, but by going home early on a Wednesday, all staff could have PPA time together and uninterrupted. In 2020, we revisited the curriculum to prepare for a post-Covid world: we focused even more on health and well-being, on inculcating a sense of responsibility to the world and for the world, and determined to encourage awe and wonder in all aspects of the curriculum.

**TRUSTEES' REPORT (CONTINUED)**  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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**Achievements and performance (continued)**

We also offer wraparound care from 7.30 - 5.30 every day for those parents who need it.

This is a school that is seen as very successful, but it is one where there are many varied demands on us all - we work very hard indeed, but we do so out of love for the place and the profession, and of course, the children. We aim to make it a fun, happy, safe school where children get a great education.

***b. Quality of Education***

The introduction to the school on our website includes this: 'We have always been a school where behaviour is excellent and where children flourish both socially and academically, but the experience of Covid-19 has helped us to focus even more on the responsibility we have to bring joy into the lives of our children and to help them to understand how to take their place in the world, fully and actively enjoying and contributing to the best of their ability.' This is how we introduce our curriculum on the website:

At Ivanhoe, we recognise that children deserve a curriculum that has breadth, depth and balance and that is an exciting curriculum, personalised for our children; so that when children leave our school they will have had a great start, with opportunities and experiences that will be embedded for life.

Since Coronavirus came into our lives in 2020, we have had a radical rethink about our 'offer' and have agreed that we need to put a new focus on mental and physical health and well-being as well as a more profound understanding of our place in the world and the need to actively love what we do: our curriculum is not just about the quality of education, but the quality of life.

Ask any teacher at school, from the oldest to the youngest, and they can describe vividly their memories from their own primary school days. The primary school influences a child for life and our ambition is that Ivanhoe offers an experience that will do this by setting them on the right path from the minute they enter our doors. We want our children to be shaped by their primary school experience so that it is still with them into adulthood - still helping them engage with the world and still guiding them; the experiences still alive in them.

We are not afraid to say that our ambition is for children to love what they are learning - we want to inspire children and to see beauty all around them; thus they will value the world around them and engage richly and meaningfully in all they do.

In Conisbrough, we have a rich heritage that we use to support our curriculum. Our History teaching is blessed by the fact that we have the oldest church in South Yorkshire (St Peter's) and the wonderful Conisbrough Castle that inspired Sir Walter Scott to write 'Ivanhoe'; we focus on these by visits and using other visits to contrast our castle with another castle, and our church with a Cathedral, thus we can personalise using our locality, but also expand by taking the children further afield to contrast their experiences. We have tried to approach our whole curriculum in the same manner, for example, by seeing how we can apply 'next steps' to what we teach - using local pathways in our music teaching so that those who enjoy our brass music lessons can access the brass opportunities in the wider community, and those who wish to do so in sport can access the pathways to local sports beyond the school - and this is an area rich in brass music tradition as well as sport. Obviously, we have been constrained by Coronavirus, but these are certainly our intentions, all other things being equal.

Our focus on cultural capital marries with our desire to give our children experience of the best that has been thought and said. With that in mind, our children will read classic English texts, which otherwise they would probably not access - and they will see that you can enjoy Robert Louis Stevenson as much as you can David Walliams.

TRUSTEES' REPORT (CONTINUED)  
FOR THE YEAR ENDED 31 AUGUST 2022

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**Achievements and performance (continued)**

At Ivanhoe, we understand that our children will have far better life chances if they are highly literate and numerate, but we are determined not to pursue those aims if it leads to a curriculum that is narrowed and starved of opportunities to develop the whole child. By understanding our children and by recognising how we can help them to be fully rounded citizens we can redress any social disadvantage that may have chained our community in the past. Our children are the future and our curriculum will give them the very best chances in life and the very best chances to appreciate and enjoy their lives and the opportunities that come their way.

In 2022/23, we will be looking at Reading as part of our SIP. In terms of KS2 SATs, we have always been more successful in maths than reading. We put a lot of resources into reading throughout the school but we considered that we needed to revisit our approach on both reading as part of the curriculum and promoting reading for pleasure.

And this is how we introduce the notion of cultural capital:

*"Beauty is truth, truth beauty; that is all you know on earth, and all you need to know."* (Keats)

This school is committed to ensuring that children are given every opportunity to taste the best cultural experiences that we can offer in the hope that by gaining access to the best, children will understand that the most beautiful experiences are accessible and that they are their birth right. We see this as just as important as their understanding of British Values. We are delighted that in the new Ofsted Framework, Cultural Capital heads the Curriculum Content section with the quotation:

*"It is the essential knowledge that pupils need to be educated citizens introducing them to the best that has been thought and said and helping to engender an appreciation of human creativity and achievement."*

With this in mind, we have decided to support our new curriculum with a series of school trips that will be set in stone so that by the time a child goes from Reception through to the end of Y6, they will have had the opportunity to have twenty-one experiences that, added, together, should show them some of what the world has to offer. The list was compiled by children, parents and staff - and these will not be the only school trips, but they will be the ones that are guaranteed to every child.

We were constrained by distance from school and to some extent by expense, but we believe we have a very good selection.

Reception, Y1 and Y2.

A stately home, the Railway Museum, Conisbrough Castle and one other castle, a zoo, a theatre (for a play, music or dance) Eureka Museum, Yorkshire Sculpture Park, The Deep (and the Humber Bridge) and a windmill and wind turbine.

Y3, Y4, Y5 and Y6.

National Space Centre, a coal pit, a visit to the Peak District (Iron Age forts) a lighthouse and Flamborough Head, a cathedral, Castle Museum (York), Whitby, Beamish, the Derbyshire Caves, the theatre to see a Shakespeare play, a residential, and art museum (possibly the Lowry or Hockney museum).

Schools can endeavour to use the curriculum to introduce children to the best that has been thought and said, and a glance at our English curriculum will demonstrate that clearly with our commitment to sharing classic children's literature and the best of poetry - but the curriculum needs to be supported by an exciting range of school visits in order to give a more complete range of experiences, which is our aim.

We take very seriously our task of providing an exceptional education - it is what we are here for! As a staff, we spent 2018/19 rewriting our curriculum to meet the stated aims of the New Ofsted Framework and were delighted to do that as

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 AUGUST 2022

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**Achievements and performance (continued)**

it gave voice to what has always underlain our philosophy. In 2020, we tried to refashion it to respond to what we saw as a greater need for health and well-being, citizenship and awe and wonder in a post-Covid world. Our mission statement of some years, which is proudly expressed through large pieces of signage to welcome visitors to the school, is stated this:

We will make our school a place where children are happy and where they have fun. Ivanhoe will be a safe, secure school where great teaching inspires children to reach their potential and achieve their ambitions. In this place, imagination will be as important as knowledge; children will enjoy a creative, enriching curriculum with school trips they will never forget. No child can learn and attain academic excellence unless they love their school; we will do all that is possible to help each of our children to believe, to achieve and to succeed.

So, this is a school that is delighted to see that Ofsted has caught up with what we have been aiming towards for years. Our intent is clear and absolutely matches what Ofsted considers best practice as can be seen from reading the curriculum area on the website. Each Subject Leader has taken responsibility for redesigning their curriculum and writing a statement of intent they have taken on board the need to personalise it for this school and to emphasise both the inward and outward intent inward to the child, outward to how the child can use the curriculum to engage with the world (not just theoretically, but emphasising next steps, taking advantage of local offers.) As a staff, we have spent a considerable amount of time ensuring that we are all fully engaged in that process - and by the nature of this staff, that means that we are all on board: Subject Leaders speak with a powerful voice in this school and we share responsibility for all outcomes. Because of this, we are secure in the knowledge that neither SEND nor disadvantage prevents our children from excellent outcomes.

A glance at the English curriculum will show that we have four separate policies for reading: Reading Policy, Reading for Pleasure Policy, Set Reading Texts Policy, Progression of skills in Reading - this will show our commitment to the pleasure principle as well as to our desire to introduce children to the best quality writing in the English language. Referring back to the Education and Skills deprivation element of our deprivation report, about 48% of our children come from families in the bottom 10% in terms of educational background so we understand the battle to allow our children their entitlement in terms of reading and writing (and speaking and listening.) We work extremely hard on phonics - which is a whole school effort - and we complement that with high quality reading texts and with a focus on the enjoyment of reading...and of course, we reward children for their reading at home so that they get a sticker for every time they read at home and then they can spend their stickers on a whole variety of goodies through the course of the year, culminating in a free sweatshirt for those who read every day across a year (76 children in 2018/19). In 2022, we purchased a book-vending machine that can be used by children who have read five times or more in a week (each child who does that is put into a weekly class draw) this has proved a very popular reward for those children who read more frequently.

The impact of our curriculum is clear - our children achieve highly: *"Pupils leave the school attaining standards in reading, writing and mathematics that are consistently above that expected for their age and above other pupils of the same age nationally."* (Ofsted 2016) in 2019, Ofsted wrote, *"leaders and governors have improved the quality of education since the previous inspection. Pupils do very well in the national assessments..."* We believe that we send our children to secondary school completely prepared for the next stage of their education and as lifelong learners: our children will leave us knowing how to play a musical instrument and having seen Shakespeare on stage, which is something they are very unlikely to do at secondary school. We know that many of our children do very well at secondary school, accessing university education at the end of Y13 and we like to think that we helped them on their way by providing a great first step. In 2022, we heard that one of our ex-Y6 pupils had been given a place at Cambridge to study Law, and two children a year below him (ex-Ivanhoe students) are applying for Oxford for Law and Medicine this year.

**c. Behaviour and Attitudes**

Ofsted has always found the behaviour of children at this school to be outstanding - and visitors to the school are always

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

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**TRUSTEES' REPORT (CONTINUED)**  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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**Achievements and performance (continued)**

impressed by what they see, and this includes the many parents who look around the school seeking to have their children admitted into the various year groups (we have further grown from 331 to 344 children between 2020 and 2022) and will continue to grow in the years ahead. Children are sunny, happy, polite, friendly, and also respectful - this is what is taken as the norm at Ivanhoe. This is something that we work hard at but it is also part of the school tradition - so it is not a particular task to instil: all adults are treated with equal respect and children are respectful of each other.

There are children at Ivanhoe who come from very troubled backgrounds and those children may struggle to demonstrate appropriate learning behaviour in class - but on a weekly basis, we celebrate learning behaviours with parents through Learner of the Week (Respect, Resilience, Independence, Pride, Curiosity and Determination) as well as daily Learner of the Day postcards, so there is a great deal of focus on behaviour(s). At the same time, we have a whole-school graduated behaviour system as well as graduated responses to poor behaviour. We are a Thrive school and have staff who are able to work with children to prevent poor behaviours by anticipating them – and responding.

Our overarching SEN approach is to put a large amount of resources into meeting the needs of children as early as possible and thus making learning easier and more fulfilling which reduces the number of behavioural issues that arise in class. Behaviour in school is also helped by our excellent relationships with parents: we are very much supported by parents, some of whom clearly struggle with their own children - but we rarely get into dispute with parents and so children understand that school and home work closely together.

We have a zero tolerance towards aggression, discrimination and bullying. We deal with children who struggle with social skills through use of nurture groups and/or supervised play as well as the therapies that we run in school. Children know that if there are issues on the playground, they will be dealt with appropriately. The more difficult issues around aggression, discrimination and bullying are most likely to occur outside school and through social media. We spend a lot of time offering advice to parents and children about the ill effects of social media, but undoubtedly, social media is a cause for conflict amongst children and grown-ups in Conisbrough - we do spend a considerable amount of time in school trying to unpick issues that have occurred on social media. Safeguarding will be a priority area in our SIP in 2022/23, not because of concerns about safeguarding, but in order to attempt to make something that is very good, even better. Health and Safety will also be part of the SIP to go hand in hand with Safeguarding so that we can be assured that we are as complete as we can be.

We work very hard to meet the needs of children - we recognise that in society there are increasing numbers of children with emotional and behavioural issues that need addressing. Our response to this has been the increase in spending on Educational Psychology services and Learning Support Services as well as employing dedicated staff who work with children whom we recognise as vulnerable: this is an ambition to meet the needs of children rather than managing the behaviours that result from their needs. We are convinced that this is the right approach. Ivanhoe staff want to help children - which can be exemplified in the way in which we catered for the two permanently excluded children whom the LA shifted onto us in the past few years: we took their education seriously even if their previous schools had not. We do temporarily exclude children when lines are crossed, but our aim is always to help children to help themselves and thus manage at school and we have not ever permanently excluded anyone.

One of the visible ways in which children are motivated towards having a positive attitude is the school's use of coloured sweatshirts. If you are a 99%+ attender, you get a red sweatshirt from the school with '100% attendance' embroidered upon it. If you are a Reading Champion you get a purple sweatshirt, if you are a School Counsellor it is a green sweatshirt - and the Y6 choose their own colour top (blue in 2021/22). Children wear their achievements with pride, which helps with that sense of community. We have a community of children who love school and who do their utmost to contribute fully to the life of the school - taking on extra work and being proud of their achievements.

In terms of attendance, we better the local and national average in both overall attendance and in persistent absence. We have many ways of motivating children to be in school. Good attendance is a constant message in our newsletters

**Achievements and performance (continued)**

(homework front page) to parents. We have manipulated the school year to create a two-week summer half term holiday in order to give parents the opportunity to have cheaper holiday choices (the difference between the first and second week in terms of holiday prices is enormous). We certificate children for attendance of 99%+ on a termly basis and we have the sweatshirts awarded for a full year of excellent attendance. We monitor attendance very closely and set up meetings with parents whose children fall behind. In addition, we are always prepared to pick up children when parents are struggling to get them in. Every member of the school community understands our view on attendance. Unfortunately, as I explained in the 'school context', this is a community whose wealth is more obviously expressed in terms of finance rather than in education and it is a constant battle to persuade parents that a holiday is less valuable to their children than time in school. We always pursue parents who have taken holidays in term time as well as those parents who try to trick the system by claiming that their children are poorly (when they are on holiday).

Staff and students have a very positive relationship: staff love to work at this school, and their love for the task and their pride in their work, and their joy in the children are all obvious - especially to the children.

***d. Personal Development***

At Ivanhoe, we recognise that pupils' broader development is essential if we are to produce citizens of the 21st Century who can go forward confidently and take the world in their stride. This is a deprived community, but the deprivation is greater in educational terms than it is in cash terms (see school's context). In general, it is the range of experience that our children have in their home environment that we have to develop in the school environment if we are to succeed in our desire to see them well rounded. As a school (pre-covid) we created a list of 21 'essential' trips that every child would experience from Reception to Y6 (in addition to class trips that might also be organised) so that every child will have seen the best of human endeavour whether it's a castle, a lighthouse, Shakespeare at the theatre, a cathedral, a country house and so on: we want them to know what the world has to offer. In 2022/23, we have also decided to take each year group from Y3-Y6 on residentials – from a local activity centre, to the coast, to a distant activity centre and to London. At the same time, every child at the school will have a live experience with a published author in this academic year in order to stimulate writing and reading, but also to understand that writers are also people (and were children once!) and that writing is a profession that all our children can aspire to. Each year group will engage with a different author – it is not going to be a key stage in the hall for an hour, but a meaningful engagement.

Our curriculum is designed to help children to be literate and numerate whilst at the same time exposing them to a broad curriculum that shows them the world whilst at the same time allows them to take steps to take part beyond school in valuable activities locally. We have put a further emphasis on health and well-being post-Covid as well as helping our children to be responsible members of the world and people who see awe and wonder in everything. At the same time - we want to give them the very best, which is why all children have the opportunity in Year 4 to play a musical instrument, and those who want to continue this beyond year 4 have that that facilitated by the school. Not only do we put on ambitious plays/musicals, but we have taken it a step further by partnering with Doncaster's Cast Theatre to include one performance at a theatre to make the experience more valuable and more complete. At the same time, this school promotes learning behaviours as we believe that if we can help to inculcate an appreciation of the best approach to learning, we will have developed a skill for life that can be utilised for whatever new academic experiences are face by our pupils. We make pupils proud of their great learning attributes in the hope that those attributes will always be part of their make-up. Obviously, some of this has taken a knock in the past few years, but we will adhere to the principles going forward.

The school puts considerable extra resources into pastoral support. We understand that it is parents as well as children who require support and our approach is thus about teamwork with the family. Increasingly, we are moving towards meeting needs as early as possible utilising the extra Learning Support Service, Speech and Language and Educational Psychology support we buy in as well as having members of staff working exclusively with those particular children

### **Achievements and performance (continued)**

identified as vulnerable for one reason or another. We understand that we are vital in promoting healthy lifestyles as well as healthy attitudes and that is our work on a daily basis across the curriculum as well as through PHSE, PE etc.

We work tirelessly to ensure that our children can take a full part in the society in which they live - our aim is to equip our children to go into the world so that they have choices about their lifestyles and the way in which they live: they can only do this if they understand the world and how to take a part in the world. An important part of moving freely in the world is having a real sense of the values of society - and so British Values (in the widest sense) is a thread that is woven into the whole fabric of the education we offer. Our website is clear about our aims. The Y6 wrote letters to the Education Secretary and the Shadow Education Secretary last year and invited them both to meet with them – we had an acceptance from Bridget Phillipson and a date arranged, but this was lost due to the rail strike, but it would have been wonderful to have spoken with such a successful politician who came from a school like ours: we shall be following the same process again this year.

Conisbrough society is recognised by staff here as quite closed and inward looking in many respects. Many parents and grandparents of our children have been fastened to this area - often for economic reasons, but also being tied to tradition. We want our children to have a university education and to have the freedom to take their place in the world - this begins with education, but we also understand that we need to make the world accessible, with all its amazing difference and thus we need to teach children to acclimatise themselves to difference and accommodate all that is beyond what they have considered 'usual'. Our children are by nature accepting of others - we have a great many children who join mid-year and no problems with integration, and our children are accepting of children who attend school with any special needs and of any ethnicity; however, this is an inward-looking part of the world and we have to develop children's understanding of diversity so that it is well-established by the time they leave us: this is what we do across our curriculum as well as through PHSE and other opportunities.

Our children are encouraged to think about their positive role in society. Ours is a very caring school where the many charities we support are well funded by the incredible generosity of children and parents.

### ***e. Leadership and Management***

In many senses, this is a school where we are all 'leaders'. As in all schools, there is a hierarchy of leadership, but we are as much a bottom-up as a top-down institution - we listen to each other and share ideas and we judge decisions in a collegiate fashion and on their merit. Obviously, those in senior leadership positions shape the direction of the school but we are all leaders in that everything is shared and fashioned as a staff team. We all have strong, shared values - and a good example of this is the fact that all the curriculum policies are written by curriculum leaders who have responsibility for ensuring that staff understand and follow policy; this means that we are able to deliver an excellent education.

Teachers are encouraged to develop their understanding at all times, expanding their knowledge and working towards future ambitions. The school embraces a 'grow your own' culture, so most teachers on the staff were trained here, which maintains a committed and valued staff cohort. The NQTs in the school each have a mentor and share weekly meetings and observations in order to fast-track development. All teachers have planning time together, which means that communication, and the sharing of best practice is facilitated to the highest extent.

We all aim to help children complete their programmes of study. As a school, we have devoted considerable additional resources to help those children most vulnerable in terms of falling behind. Our SENCO works assiduously to meet the needs of pupils with particular needs - harnessing additional speech and language, learning support services and educational psychology services to meet our needs, in addition, we have employed a member of staff to be designated additional support (not classroom based) so that we can meet the needs of all.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

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**TRUSTEES' REPORT (CONTINUED)**

*FOR THE YEAR ENDED 31 AUGUST 2022*

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**Achievements and performance (continued)**

We work extremely effectively with our school community. Parents and carers know that they have access to the HT, the PLO (Parent Liaison Officer) and the SENCO at all times (parents and teachers also have excellent working relationships). There is a newsletter every week (the homework front page) with a comments box on it, which is read by the class teacher and passed on if necessary. We hold parent consultation meetings during the day and the evening so that it is open to all, and we increased the time allocated (from ten to twenty minutes) to make the consultation more detailed and focused. Parents come into school to learn how best to help their children through workshops - and for celebrations when children's work is showcased as well as weekly during Learner of the Week assemblies.

This school is run with the view that staff work best when they feel valued. We keep administrative tasks to the minimum and seek to work efficiently at all times. Every member of staff knows that every voice is heard. We particularly value family commitments, and staff know that we support them to attend family celebrations as well as family crises - we all support each other in this - which makes for a very strong and loyal team. Staff do work very hard at this school - but this is out of mutual respect for other staff and love of what we do; but no one feels that they are pressured to do so.

There is no harassment or bullying at this school - probably due to what is written in the paragraphs above: we take shared responsibility for decisions, we look after each other in times of celebration or crisis and we like each other very much - and we love the school and our school community. The only people who have chosen to leave this school within the past years are those who have been promoted to other establishments.

Governance at Conisbrough Ivanhoe Primary Academy has undergone improvements and changes since the pandemic and issuance of the Ntl. The board has grown and attracted parent governors and independent governors with strong skillsets. The board has adopted hybrid working to make meetings easier and the chair of governors and head keep in regular contact. Our finance link governor has been heavily involved in the Ntl process, working closely with the School Business Manager on finance related items. The board will continue to make improvements to governance in 2022 - 2023.

The school has a very strong culture of Safeguarding, with a full time, dedicated Safeguarding Officer: we all use CPOMS, which is the best way of keeping a record and sharing information. Our safeguarding training is up to date.

***f. Overall Judgement***

We believe that the quality of education is outstanding.

The other areas are judged outstanding.

Safeguarding is effective.

Early Years:

**Intent**

At Ivanhoe, Foundation Stage leaders construct an ambitious Early Years curriculum, which is designed to give all children the knowledge, skills, self-belief and cultural capital they need to succeed. We believe that building upon children's experiences is as important as building upon their knowledge and skills, and thus trips, experience days and bringing people into school are woven into the curriculum. For example, a trip to the theatre, the wildlife park and a stately home, as well as African drummers and dancers, the space dome and workers from the 'helping' professions coming into school.

The curriculum is reviewed and re-designed each year to reflect the changing needs of its children. Leaders consider carefully the needs of the children in context, and plan and sequence the curriculum to build on what children know and can do, towards the desired knowledge and skills for their future learning. Our ambitions for each and every one of our children are limitless, and so our curriculum provides no limits or barriers to children's achievements, regardless of their backgrounds, circumstances or needs. We ensure that where necessary, the curriculum and its approach to delivery, is

### **Achievements and performance (continued)**

personalised to ensure that success is inevitable, not just possible!

A large number of children enter our Foundation Stage with speech and language skills that are below or well below those typically expected (59% below ARE in Listening, Attention and Understanding at 2021 On Entry baseline screening, reduced to 44% by the end of the year, and 54% below ARE in Speaking at 2021 On Entry baseline, reduced to 41% by the end of the year) and so we have a sharp focus from day 1 on developing children's ability to communicate effectively and in acquiring a rich vocabulary. We invest in private Speech and Language Therapy services to help us successfully assess and build strategies and programmes to realise our aim, which is for EVERY child to leave the Foundation Stage with the communication and language skills – including a wide vocabulary – necessary to best ensure successful future learning and life skills.

Our phonics teaching begins early in F1, and focuses upon children developing the underpinning skills needed for successful systematic teaching of phonics later on. We use the Read Write Inc (RWInc) programme as the school's approach to teaching early reading and synthetic phonics to ensure all children are able to meet the ELG's in reading and writing, and be ready for Year 1 where they will continue to build on the skills necessary to become capable, confident readers.

### Implementation

At Ivanhoe, we plan learning across the curriculum that is meaningful and useful – always asking ourselves 'why' and 'what for?' to ensure that learning meets the needs of our specific children.

We believe that for children to learn and develop to the best of their ability, they need the adults in place who understand best how young children learn and develop, and possess the necessary skills to support them. This is why, in our Foundation Stage, the majority of teachers and support staff are EY 'specialists'. They use their expertise to ensure that the pedagogy throughout the Foundation Stage matches the needs of pupils, and evolves sensitively as it responds to the changing needs of the children as they progress.

Staff in the Foundation Stage are skilled and experienced in teaching synthetic phonics through the RWInc programme, for which the school buys into an annual support package, providing developmental support throughout the year ensuring practice is highly effective. Whilst we believe in the principles of the RWInc programme, and its impact is evident in our school, staff use their pedagogical knowledge to adapt the programme and their approach to it, to suit the needs of different children.

From the very first day in F1, children's love for reading is nurtured. Children in F1 are sent home with carefully chosen story books to share with their parents, alongside themed story baskets designed to enliven and enrich the reading experience. We have a reading reward challenge so that children are encouraged and rewarded for reading at home. For F2 children, alongside storybooks to share, phonics reading books are aligned precisely with the RWInc programme, and are chosen for children according to their developing phonic knowledge alongside their reading confidence and ability. We want to develop capable, confident readers, and so we spend a lot of time ensuring that parents understand our aims, how they can help, and ensuring that the books children take home match this. In addition, we invest in providing all children with a set of RWInc sound cards to use for practise at home to support rapid recognition of GPC and early word blending.

Teaching throughout the Foundation Stage is found by leaders to be highly effective. Staff present information clearly to children, in a way that engages them and allows them to be actively involved in learning discussions. Staff use questioning well to clarify and extend children's understanding, addressing misconceptions before moving on. Staff respond and adapt their teaching where and when necessary to ensure all learning opportunities are maximised.

TRUSTEES' REPORT (CONTINUED)  
FOR THE YEAR ENDED 31 AUGUST 2022

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**Achievements and performance (continued)**

In the Early Years, we use stories as part of our everyday teaching: to introduce new mathematical concepts, PSHE teaching, supporting topic themes and prompting lines of enquiry. We also have a minimum of 15 minutes dedicated story time every day. Staff tell stories with enthusiasm and expression, in a way that engages and excites children. In F1 stories are often accompanied by props to aid engagement, a strategy which is reduced as children progress through the foundation stage, to enable children to develop skills in listening to stories without the need for visual stimulation. At Ivanhoe, we have a sharp focus on the need to develop children's vocabulary. Stories is one way in which we work upon building vocabulary with our youngest children - that and through the RWInc programme.

Mathematics is taught throughout the Foundation Stage using the White Rose Maths materials as a starting point. Our maths curriculum is designed to ensure that children spend sufficient time exploring, using, and understanding numbers, so that they have a strong basis for more complex learning later on.

Children are assessed throughout the Foundation Stage using both short incidental and longer planned observations. Longer observations are used to focus on the Characteristics of Effective learning and help staff develop a clear understanding of how the children in their care learn, and how they can best support them in developing the Characteristics further. We use the knowledge gained through adult-led activities and quality interactions during co-play to deepen our understanding of children's attainment and next steps, and use these to inform future planning. Leaders understand the limitations of assessment and therefore work to develop systems that avoid unnecessary burdens for staff and children. Staff organise targeted interventions for children who need it in a timely manner, enlisting the support of 'specialists' where necessary. At Ivanhoe, we try and involve all stakeholders in children's assessment, and work to engage parents in the process through our home/school books and by sharing achievements and experiences through Class Dojo.

Staff in the Foundation Stage work tirelessly to create an environment that supports the school's intent of an ambitious curriculum. Resources are carefully chosen to promote learning in the prime areas and in developing the Characteristics of Effective Learning. Open-ended provision encourages our children to explore, co-operate, think creatively and problem solve.

Behaviour in the Early Years is excellent. Children are supported well to develop high levels of self-control, co-operation and respect for themselves and others. The curriculum is designed to afford children a wide range of experiences that promote understanding of people, families, communities, religions and traditions beyond their own. Through experience days, children learn about religious festivals such as Diwali and Eid, alongside Easter and Christmas, and are encouraged to explore similarities and differences between them.

Through PSED teaching and circle time activities, children in the Early Years are tasked to consider the importance of keeping ourselves healthy – physically, emotionally and spiritually. Outdoor equipment – both static and open-ended - has been carefully selected to enable children to develop the necessary skills to create and manage their own risks (within reason) under the supportive and watchful eye (and if necessary, intervention) of an adult. Equipment that also helps develop the vestibular system, supports physical development in both gross and fine motor ways.

Engaging parents in children's learning and development is something that we are passionate about at Ivanhoe. In the Foundation Stage, we hold parent workshops in both F1 and F2. F1 workshops focus on the importance of play in developing early mathematical and literacy concepts, as well as developing those physical skills needed for successful learning later on. Workshops in F2 focus more carefully on how parents can support children's learning in reading, phonics and maths, including observing teaching sessions, watching video clips of teachers modelling reading with children, and receiving resource packs to take home. Reports are issued to parents three times per year about how well children are progressing, and parents are invited to attend face-to-face discussions at these times. Parents have online access to children's observation and assessment information and can view this at any time. Homework is sent out in F2 with detailed information about what children have been learning that week.

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**TRUSTEES' REPORT (CONTINUED)**

*FOR THE YEAR ENDED 31 AUGUST 2022*

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**Achievements and performance (continued)**

Impact

Children make good progress through the Foundation Stage, considering low starting points on entry to F1 (and F2 for those joining our Reception Class that did not attend our Nursery).

Attainment on entry is found to be below the level expected in most areas, with attainment in the Prime Areas of Self-regulation, Managing Self, Building Relationships, and Fine Motor Skills, all with 2% or fewer of pupils working at the expected level. A significant proportion of children come to us with poor levels of development in speaking and understanding (41% and 46%), which impact upon all other areas of development.

The percentage of pupils working at the expected levels in Reading, Writing and Maths are similarly low to those in the Prime Areas (0% reading, 2% writing, with prior attainment in Maths slightly better at around 5%).

Children at Ivanhoe also enter with attainment levels below that expected in The Natural World, and People, Cultures and Communities (between 5-15% at the expected level).

By the end of the Foundation Stage, children have historically attained in line with national expectations at GLD (last held in 2019). Whilst the DfE no longer publishes school level results, end of Foundation Stage Profiles are still completed for each child to aid transition to Year 1. 53% of pupils achieved GLD in 2022, and 67% met the ELGs in all Prime Areas.

As a result of high quality teaching and experiences, children have developed the skills and attitudes needed to begin Year 1, and for those children who did not meet ELG's, Year 1 teachers are well prepared as to how best support them to achieve them quickly in the Autumn term.

***g. Going concern***

After making appropriate enquiries, the Board of Trustees has a reasonable expectation that the Academy has adequate resources to continue in operational existence for the foreseeable future. For this reason they continue 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 accounting policies.

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## CONISBROUGH IVANHOE PRIMARY ACADEMY

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### TRUSTEES' REPORT (CONTINUED) FOR THE YEAR ENDED 31 AUGUST 2022

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#### **Financial review**

The Academy received a Notice to Improve (Nti) on 11 March 2022.  
(<https://www.gov.uk/government/publications/notice-to-improve-conisbrough-ivanhoe-primary-academy>).

The Academy have worked closely with the ESFA and Regional Schools Commissioner to address the findings and have held monthly meetings until 21st October 2022 when the ESFA and RSC indicated that they were pleased with the progress being made and removed the need to have face to face meeting. The Academy continues to provide monthly updates against the action plan alongside sight of monthly management accounts.

The Academy has made good progress since receiving the Nti. The governing body has been strengthened with new members, including two independent governors. It has strengthened its members with the introduction of two new ones, both independent from the school. Internal improvements have been rolled out and a robust review of Multi Academy Trusts was carried out, which has led to the Academy forming a relationship with a Trust and entering into an SLA for their Chief Financial Officer to take charge of the finances. Meetings have been increased and a clear separation of duty has been rolled out with the finance link governor taking the lead on the finance committee alongside a parent governor leading on Audit and Risk.

The Academy continues to work on the remaining conditions from the NTI, the largest being an external review of governance which is being commended at the end of 2022/start of 2023 and to continue discussions with a Multi Academy Trust to review options for joining in the future.

The ESFA and RSC commissioned a second visit from a School Resource Management Advisor (SRMA) in October and early feedback is that they can see the improvements being made and a clear understanding of further steps required. The ESFA has indicated that unless the SRMA identifies anything of major concern the Nti should be lifted in 2023. The governing body continues to make improvements, follow the action plan and keep the ESFA informed of progress. On completion of the external review of governance, any actions will be added to the overall action plan and form part of the focus in 2023.

The main source of the Academy's income is obtained from the Education & Skills Funding Agency (ESFA) in the form of recurrent grants, which are restricted for particular purposes. The grants received from the ESFA during the year ended 31 August 2022 and the associated expenditure are shown as restricted funds in the Statement of Financial Activities.

The Academy also receives other grants from the ESFA and from other government bodies. In accordance with SORP 2019 such grants are shown in the Statement of Financial Activities as restricted income.

During late spring, the Key Stage 2 toilets were extended and renewed to include a disabled toilet. Doncaster MBC funded the majority of the works with the Academy expected to make a 10% contribution. During summer, the main school building had new lighting, ceilings, new switchgear, distribution boards, emergency lighting and external lighting installed. A new fire detection system and fire panels was also installed across the school. These works were the result of a successful CIF bid. Again, a 10% contribution is expected from the school. This expenditure is shown in the Statement of Financial Activities.

During the year ended 31 August 2022, the Trust had a net deficit on unrestricted and restricted funds (excluding pension) of £53,853 (surplus £60,570: 2021).

The actuarial gain of £923,000 (£110,000: 2021) arose on the Academy's share of the Local Government Pension Scheme (LGPS) at 1 September 2022 and its total share of the LGPS deficit (included in restricted funds) decreased to £472,000 from £1,264,000.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

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**TRUSTEES' REPORT (CONTINUED)**

*FOR THE YEAR ENDED 31 AUGUST 2022*

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The Academy's bank balance at 31 August 2022 was £140,936 (£174,552: 2021).

School meals were reinstated from September 2021 following suspension due to Covid-19. The breakfast club, tea club and after school clubs continue to be popular. Off-site visits also increased throughout the year and external providers continued to deliver experiences within school. There were no clubs run during the summer holidays as the site was in the control of the building contractors undertaking the electrical works.

***a. Key financial performance indicators***

The Governors consider the company financial statements and internal budget reports to be the key performance indicators as to the Academy's level of solvency.

The school has considerable reserves and numbers of children attending the school continue to rise which has a concomitant positive effect on the school budget.

***b. Financial and risk management objectives and policies***

The process of financial and risk management objectives and identification involves Governors and the SLT. Consideration is given to the following factors: the vision, beliefs, values and strategic goals; the current and planned nature and scale of the Academy's activities; external factors that may affect the Academy such as legislation and regulation, and the Academy's reputation with its key stakeholders and the operating structure.

***c. Principal risks and uncertainties***

The Governors review its key risks together with the operating, financial and compliance controls, which have been implemented to mitigate risks. There are formal ongoing processes to identify, evaluate and manage the Academy's significant risks.

As the Academy is funded directly by the ESFA, funding streams are considered reasonably safe and secure. The main financial risk arises from possible changes in Government policy and funding levels. The principal operational risk is the possible departure, or long term sickness absence of key members of staff. Succession planning and training takes place. Procedures are in place for senior management to investigate complaints and escalate to Governors, if necessary.

***d. Reserves policy***

During the year 2022/23, the Governors will review the income reserve levels of the Academy in accordance with the Reserves and Investment policies. This review will encompass the nature of income and expenditure streams, the need to match income with commitments and the nature of reserves. As a result of this review, the Governors will set a target level.

The Academy's free reserves are its funds after excluding restricted funds. Free reserves are therefore the resources the Academy has or can make available to spend for any or all of the Academy's purposes once it has met its commitments and covered other planned expenditure. More specifically free reserves represent income to the Academy which is to be spent at the Academy's discretion in furtherance of any of the Academy's objects but which is not yet spent, committed or designated. The Academy's current level of free reserves is £91,499 (£164,608: 2021) which are included within bank balances of £140,936 and (£174,552: 2021) which are considered to be adequate to cover any immediate call on reserves.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**TRUSTEES' REPORT (CONTINUED)**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

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***e. Investment policy***

As a Single Academy Trust (SAT), the Trustees consider it important to have funds available for unforeseen events. The Governors acknowledge the need to have a Reserves and Investment Policy.

***f. Plans for future periods***

The Trust is currently undertaking a robust review of a number of Multi Academy Trusts (MAT), which is a condition of the NTI and considering joining a MAT. Conisbrough Ivanhoe has been working closely with Venn Academy MAT on finance, health, and safety, which is engendering an excellent working relationship. The school will continue to work closely with Venn into the future.

Conisbrough Ivanhoe Primary Academy continues to be a successful and popular school with pupil numbers increasing.

***Funds held as custodian on behalf of others***


The Academy does not hold any funds on behalf of any other parties as at 31 August 2022.

***Disclosure of information to auditors***

Insofar as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware, and
- that 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 auditors are aware of that information.

The Trustees' report was approved by order of the Board of Trustees, as the company directors, on  
Dec 16, 2022 and signed on its behalf by:

  
Caroline Lee (Dec 16, 2022 15:17 GMT)

.....  
**Mrs C Lee**  
(Chair of Trustees)

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**CONISBROUGH IVANHOE PRIMARY ACADEMY****(A company limited by guarantee)**

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**GOVERNANCE STATEMENT**

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**Scope of responsibility**

As Trustees, we acknowledge we have overall responsibility for ensuring that Conisbrough Ivanhoe Primary Academy 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 Handbook and competency framework for governance.

The Board of Trustees has delegated the day-to-day responsibility to the Headteacher Mr J P Brian, 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 Conisbrough Ivanhoe Primary Academy 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. Early in the year, meetings were held virtually, but as the year progressed, meetings were held hybrid.

Attendance during the year at meetings of the Board of Trustees was as follows:

| Trustee   | Meetings attended | Out of a possible |
|---|-------------------|-------------------|
| Mr J P Brian, Accounting Officer / Headteacher                      | 10                | 10                |
| Mrs S Broadhead   | 2                 | 2                 |
| Ms L V Fletcher (resigned)  | 2                 | 4                 |
| Mrs K Hutton  | 0                 | 0                 |
| Dr M Lawson   | 4                 | 6                 |
| Mrs C Lee, Chair  | 10                | 10                |
| Ms R Lockwood   | 8                 | 10                |
| Mrs R Matthews, Staff Trustee (end of term)                         | 5                 | 10                |
| Miss C Moxon  | 0                 | 0                 |
| Mr A Nixon, Vice Chair  | 9                 | 10                |
| Ms A Parveen  | 4                 | 6                 |
| Mr C Price  | 6                 | 6                 |
| Mr L Richards   | 4                 | 6                 |
| Mrs V Sedgwick, Staff Trustee (resigned)                            | 0                 | 10                |
| Miss R Simpson (Staff Support)                                      | 2                 | 7                 |
| Mrs R Stocks (end of term)  | 3                 | 4                 |
| Mr M Taylor (not required to attend meetings)                       | 0                 | 0                 |
| Mrs J Toller, Vice Chair  | 6                 | 10                |
| Ms R Wesley (end of term)   | 2                 | 4                 |
| Ms K Winnell  | 1                 | 3                 |
| Miss F Denigan (Observer, Parent Liason Officer - no voting rights) | 3                 | 10                |
| Miss J Marriott (Principal Finance Officer)                         | 8                 | 10                |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

**(A company limited by guarantee)**

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**GOVERNANCE STATEMENT (CONTINUED)**

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**Governance (continued)**

All Trustees are invited to attend all of the meetings and the Audit, Finance & Staffing Committee. The purpose of the Audit, Finance & Staffing Committee is:

- To assist the decision making of the Governing Body, by enabling more detailed consideration to be given to the best means of fulfilling the Governing Body's responsibility to ensure sound management of the Academy's finances and resources, including proper planning, monitoring, probity, procurement and use of best practice
- To make appropriate comments and recommendations on such matters to the Governing Body for ratification basis
- Major issues will be referred to the full Governing Body for ratification

Particular issues dealt with during the period were as follows:

- Additional cleaning staff to ensure to improve health and safety and hygiene in school
- Additional mid-day supervisor staff to provide greater cover

The Governing Body continues to review governance and the effectiveness of the governance procedures to ensure these are in line with best practice. The Governing Body has been enhanced with the appointment of four new Parent Governors and two External Governors. These six new Governors bring excellent new skills to the Governing Body. The committee structure, terms of reference and their composition have been reviewed. The Academy continue to work with the ESFA on the governance structure, effectiveness and progress with the conditions of the Ntl. The effectiveness of the governance structure will be kept under review during 2020/21. Support in relation to finances has been provided by Delta Academies, SAAF and more recently and ongoing Venn Academy.

**Review of value for money**

As Accounting Officer, J P Brian 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 achieved in return for the taxpayer resources received.

The Accounting Officer considers how the Academy'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 has delivered improved value for money during the year in the following ways:

- The School Business Manager takes care to ensure all purchases and contracts are apt and fit for purpose and challenges any item which does not deliver a clear benefit
- When appropriate, tendering and obtaining at least three quotes, with the Finance Committee being involved in the procurement process for large expenditures
- Energy is purchased in conjunction with the Local Authority in order to take advantage of its corporate purchasing powers
- The use of Procurement Frameworks provide greater value for money

**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. Therefore, it can 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 policies, aims and objectives, to evaluate the likelihood of those risks being realised and

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

**(A company limited by guarantee)**

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**GOVERNANCE STATEMENT (CONTINUED)**

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**The purpose of the system of internal control (continued)**

the impact should they be realised, and to manage them efficiently, effectively and economically. The system of internal control has been in place in Conisbrough Ivanhoe Primary Academy for the period 1 September 2021 to 31 August 2022 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 charitable company 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's significant risks that has been in place for the period 1 September 2021 to 31 August 2022 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's system of internal financial 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 monthly management reports which are reviewed and agreed by the Board of Trustees and shared with the ESFA
- regular reviews by the Finance 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
- delegation of authority and segregation of duties
- identification and management of risks

The Board of Trustees has decided to employ Hart Shaw as internal auditor/scrutineer.

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

- ESFA Notice to Improve progression (including review of updated procurement procedures)
- Review of External auditors' recommendations and progression

On a semi-annual basis, the internal auditor reports to the Board of Trustees on the operation of the systems of control and on the discharge of the Board of Trustees' financial responsibilities.

The Academy confirms that this function was delivered in line with the ESFA's requirements and no material control issues arose during the period.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**GOVERNANCE STATEMENT (CONTINUED)**

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**Review of effectiveness**

As accounting officer, Mr J P Brian 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 financial management and governance self-assessment process;
- support from school finance specialists;
- the work of the executive managers within the Academy who have responsibility for the development and maintenance of the internal control framework.
- the work of the external auditors;

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

Approved by order of the members of the Board of Trustees and signed on their behalf by:

  
Caroline Lee (Dec 16, 2022 15:17 GMT)  
.....  
**C Lee**  
Chair of Trustees  
Date: Dec 16, 2022

  
Joe Brian (Dec 16, 2022 17:54 GMT)  
.....  
**J P Brian**  
Accounting Officer

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

**(A company limited by guarantee)**

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**STATEMENT ON REGULARITY, PROPRIETY AND COMPLIANCE**

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As accounting officer of Conisbrough Ivanhoe Primary Academy, I have considered my responsibility to notify the Academy Board of Trustees and the Education and Skills Funding Agency (ESFA) of material irregularity, impropriety and non-compliance with terms and conditions of all funding received by the Academy, under the funding agreement in place between the Academy and the Secretary of State for Education. As part of my consideration I have had due regard to the requirements of the Academies Financial Handbook 2021.

I confirm that I and the Academy Board of Trustees are able to identify any material irregular or improper use of all funds by the Academy, or material non-compliance with the terms and conditions of funding under the Academy's funding agreement and the Academies Financial Handbook 2021.

I confirm that no instances of material irregularity, impropriety or funding 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 ESFA.

*Joe Brian*

joe Brian (Dec 16, 2022 17:54 GMT)

.....  
**J P Brian**

Accounting Officer

Date: Dec 16, 2022

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**STATEMENT OF TRUSTEES' RESPONSIBILITIES**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

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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 Education and Skills Funding Agency, 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 . 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 of the Charities SORP 2019 and the Academies Accounts Direction 2021 to 2022;
- 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 ESFA/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 and signed on its behalf by:

  
Caroline Lee (Dec 16, 2022 15:17 GMT)  
.....  
**C Lee**  
Chair  
Date: Dec 16, 2022

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

(A company limited by guarantee)

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**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS TO THE MEMBERS OF CONISBROUGH IVANHOE PRIMARY ACADEMY**

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**Opinion**

We have audited the financial statements of Conisbrough Ivanhoe Primary Academy (the 'academy') for the year ended 31 August 2022 which comprise the statement of financial activities, the balance sheet, the statement of cash flows and the related notes, 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 2021 to 2022 issued by the Education and Skills Funding Agency.

In our opinion the financial statements:

- give a true and fair view of the state of the Academy's affairs as at 31 August 2022 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; and
- have been prepared in accordance with the requirements of the Companies Act 2006, the Charities SORP 2019 and the Academies Accounts Direction 2021 to 2022 issued by the Education and Skills Funding Agency.

**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 Auditors' responsibilities for the audit of the financial statements section of our report. We are independent of the Academy in accordance with the ethical requirements that are relevant to our audit of the financial statements in the United Kingdom, including the Financial Reporting Council'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 Academy'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.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

(A company limited by guarantee)

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**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS TO THE MEMBERS OF CONISBROUGH IVANHOE PRIMARY ACADEMY (CONTINUED)**

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**Other information**

The other information comprises the information included in the annual report other than the financial statements and our auditors' report thereon. The Trustees are responsible for the other information contained within the annual report. 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.
- 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 our knowledge and understanding of the Academy 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; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of Trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

**Responsibilities of trustees**

As explained more fully in the Statement of trustees' responsibilities, the Trustees (who are also the directors of the Academy 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 Academy'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 Academy or to cease operations, or have no realistic alternative but to do so.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

**(A company limited by guarantee)**

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**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS TO THE MEMBERS OF CONISBROUGH IVANHOE PRIMARY ACADEMY (CONTINUED)**

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**Auditors' 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 an auditors' report 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:

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 gained an understanding of the legal and regulatory framework applicable to the trust and the sector in which it operates, and considered the risk of such regulations, including fraud. We designed audit procedures to respond to the risk, recognising that the risk of not detecting a material misstatement due to fraud is higher than the risk of not detecting one resulting from error.

We focussed on laws and regulations relevant to the trust which could give rise to a material misstatement in the financial statements. These laws and regulations include, but are not limited to, those issued by or relating to Ofsted, ESFA, GDPR, Safeguarding and Health and Safety. Our testing included discussions with management and directors with direct responsibility for the compliance of laws and regulations, agreeing financial statement disclosures to underlying supporting documentation, reviewing legal expenses and reviewing Ofsted reports. We also reviewed the trusts' website to ensure the required disclosures had been made in line with the Academies Trust Handbook. There are inherent limitations in the audit procedures described and, the further removed non-compliance with laws and regulations is from the events and transactions reflected in the financial statements, the less likely we would become aware of it.

As part of our audit, we addressed the risk of management override of internal controls, including testing of journals and review of the nominal ledger. We evaluated whether there was evidence of bias by the directors that represented a risk of material misstatement due to fraud.

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](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditors' report.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS TO THE MEMBERS OF CONISBROUGH  
IVANHOE PRIMARY ACADEMY (CONTINUED)**

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**Use of our report**

This report is made solely to the Academy'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 Academy's members those matters we are required to state to them in an auditors' 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 Academy and its members, as a body, for our audit work, for this report, or for the opinions we have formed.

*Philip Allsop*  
Philip Allsop (Dec 16, 2022 17:55 GMT)

**Philip Allsop (senior statutory auditor)**

for and on behalf of

**BHP LLP**

2 Rutland Park

Sheffield

S10 2PD

Date: Dec 16, 2022

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

**(A company limited by guarantee)**

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**INDEPENDENT REPORTING ACCOUNTANT'S ASSURANCE REPORT ON REGULARITY TO CONISBROUGH IVANHOE PRIMARY ACADEMY AND THE EDUCATION AND SKILLS FUNDING AGENCY**

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In accordance with the terms of our engagement letter dated 21 June 2021 and further to the requirements of the Education and Skills Funding Agency (ESFA) as included in the Academies Accounts Direction 2021 to 2022, we have carried out an engagement to obtain limited assurance about whether the expenditure disbursed and income received by Conisbrough Ivanhoe Primary Academy during the year 1 September 2021 to 31 August 2022 have been applied to the purposes identified by Parliament and the financial transactions conform to the authorities which govern them.

This report is made solely to Conisbrough Ivanhoe Primary Academy and ESFA in accordance with the terms of our engagement letter. Our work has been undertaken so that we might state to Conisbrough Ivanhoe Primary Academy and ESFA 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 Conisbrough Ivanhoe Primary Academy and ESFA, for our work, for this report, or for the conclusion we have formed.

**Respective responsibilities of Conisbrough Ivanhoe Primary Academy's accounting officer and the reporting accountant**

The accounting officer is responsible, under the requirements of Conisbrough Ivanhoe Primary Academy's funding agreement with the Secretary of State for Education dated 21 December 2011 and the Academy Trust Handbook, extant from 1 September 2021, 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 Academies Accounts Direction 2021 to 2022. 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 year 1 September 2021 to 31 August 2022 have not been applied to purposes intended by Parliament or that the financial transactions do not conform to the authorities which govern them.

**Approach**

We conducted our engagement in accordance with the Framework and Guide for External Auditors and Reporting Accountant of Academy Trusts issued by ESFA. We performed a limited assurance engagement as defined 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's income and expenditure.

The work undertaken to draw our conclusions includes:

- Detailed testing on a sample basis to assess the nature of expenditure and whether funds have been used appropriately;
- Review of the academy trust's internal financial procedures to ensure that controls are in place to prevent or identify regularity issues;

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
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**INDEPENDENT REPORTING ACCOUNTANT'S ASSURANCE REPORT ON REGULARITY TO CONISBROUGH IVANHOE  
PRIMARY ACADEMY AND THE EDUCATION & SKILLS FUNDING AGENCY (CONTINUED)**

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- Ensure that ESFA approval has been obtained for relevant transactions;
- Discussions with Trustees, Senior Leadership Team and the Accounting Officer throughout the audit process to ensure that all regularity threats have been addressed.

**Conclusion**

In the course of our work, nothing has come to our attention which suggest in all material respects the expenditure disbursed and income received during the year 1 September 2021 to 31 August 2022 has not been applied to purposes intended by Parliament and the financial transactions do not conform to the authorities which govern them.

*Philip Allsop*

Philip Allsop (Dec 16, 2022 17:55 GMT)

Philip Allsop  
**BHP LLP**  
Chartered Accountants  
Statutory Auditor  
2 Rutland Park  
Sheffield  
S10 2PD

Date: Dec 16, 2022

CONISBROUGH IVANHOE PRIMARY ACADEMY

(A company limited by guarantee)

STATEMENT OF FINANCIAL ACTIVITIES (INCORPORATING INCOME AND EXPENDITURE ACCOUNT)  
FOR THE YEAR ENDED 31 AUGUST 2022

|   | Note | Unrestricted<br>funds<br>2022<br>£ | Restricted<br>funds<br>2022<br>£ | Restricted fixed<br>asset funds<br>2022<br>£ | Total<br>funds<br>2022<br>£ | Total<br>funds<br>2021<br>£ |
|---|------|------------------------------------|----------------------------------|--|-----------------------------|-----------------------------|
| <b>Income from:</b>   |      |                                    |                                  |  |                             |                             |
| Donations and capital grants  | 3    | 12,330                             | -                                | 485,838                                      | 498,168                     | 13,305                      |
| Other trading activities  | 5    | 20,168                             | -                                | -  | 20,168                      | 30,073                      |
| Investments   | 6    | 22                                 | -                                | -  | 22                          | 21                          |
| Charitable activities   | 4    | 43,777                             | 1,902,380                        | -  | 1,946,157                   | 1,821,891                   |
| <b>Total income</b>   |      | <b>76,297</b>                      | <b>1,902,380</b>                 | <b>485,838</b>                               | <b>2,464,515</b>            | <b>1,865,290</b>            |
| <b>Expenditure on:</b>  |      |                                    |                                  |  |                             |                             |
| Charitable activities   | 7    | 77,827                             | 2,085,703                        | 57,912                                       | 2,221,442                   | 1,930,580                   |
| <b>Total expenditure</b>  |      | <b>77,827</b>                      | <b>2,085,703</b>                 | <b>57,912</b>                                | <b>2,221,442</b>            | <b>1,930,580</b>            |
| <b>Net (expenditure)/income</b>                                     |      | <b>(1,530)</b>                     | <b>(183,323)</b>                 | <b>427,926</b>                               | <b>243,073</b>              | <b>(65,290)</b>             |
| Transfers between funds   | 16   | (19,256)                           | -                                | 19,256                                       | -                           | -                           |
| <b>Net movement in funds before other recognised gains/(losses)</b> |      | <b>(20,786)</b>                    | <b>(183,323)</b>                 | <b>447,182</b>                               | <b>243,073</b>              | <b>(65,290)</b>             |
| <b>Other recognised gains/(losses):</b>                             |      |                                    |                                  |  |                             |                             |
| Actuarial gains/(losses) on defined benefit pension schemes         | 22   | -                                  | 923,000                          | -  | 923,000                     | (110,000)                   |
| <b>Net movement in funds</b>  |      | <b>(20,786)</b>                    | <b>739,677</b>                   | <b>447,182</b>                               | <b>1,166,073</b>            | <b>(175,290)</b>            |
| <b>Reconciliation of funds:</b>                                     |      |                                    |                                  |  |                             |                             |
| Total funds brought forward   |      | 112,285                            | (1,211,677)                      | 1,833,090                                    | 733,698                     | 908,988                     |
| Net movement in funds   |      | (20,786)                           | 739,677                          | 447,182                                      | 1,166,073                   | (175,290)                   |
| <b>Total funds carried forward</b>                                  |      | <b>91,499</b>                      | <b>(472,000)</b>                 | <b>2,280,272</b>                             | <b>1,899,771</b>            | <b>733,698</b>              |

The Statement of financial activities includes all gains and losses recognised in the year.

**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**  
**REGISTERED NUMBER: 07825848**

**BALANCE SHEET**  
**AS AT 31 AUGUST 2022**

|  | Note | 2022<br>£        | 2021<br>£   |
|--|------|------------------|-------------|
| <b>Fixed assets</b>                            |      |                  |             |
| Tangible assets                                | 13   | <b>2,280,272</b> | 1,811,822   |
|  |      | <b>2,280,272</b> | 1,811,822   |
| <b>Current assets</b>                          |      |                  |             |
| Debtors  | 14   | <b>383,319</b>   | 67,914      |
| Cash at bank and in hand                       |      | <b>70,480</b>    | 174,552     |
|  |      | <b>453,799</b>   | 242,466     |
| Creditors: amounts falling due within one year | 15   | <b>(362,300)</b> | (56,590)    |
| <b>Net current assets</b>                      |      | <b>91,499</b>    | 185,876     |
| <b>Net assets excluding pension liability</b>  |      | <b>2,371,771</b> | 1,997,698   |
| Defined benefit pension scheme liability       | 22   | <b>(472,000)</b> | (1,264,000) |
| <b>Total net assets</b>                        |      | <b>1,899,771</b> | 733,698     |
| <b>Funds of the Academy</b>                    |      |                  |             |
| <b>Restricted funds:</b>                       |      |                  |             |
| Fixed asset funds                              | 16   | <b>2,280,272</b> | 1,833,090   |
| Restricted income funds                        | 16   | -                | 52,323      |
| Restricted funds excluding pension asset       | 16   | <b>2,280,272</b> | 1,885,413   |
| Pension reserve                                | 16   | <b>(472,000)</b> | (1,264,000) |
| <b>Total restricted funds</b>                  | 16   | <b>1,808,272</b> | 621,413     |
| <b>Unrestricted income funds</b>               | 16   | <b>91,499</b>    | 112,285     |
| <b>Total funds</b>                             |      | <b>1,899,771</b> | 733,698     |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**  
**REGISTERED NUMBER: 07825848**


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**BALANCE SHEET (CONTINUED)**  
*AS AT 31 AUGUST 2022*

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The financial statements have been prepared in accordance with the provisions applicable to entities subject to the small companies regime.

The financial statements on pages 34 to 62 were approved and authorised for issue by the Trustees and are signed on their behalf, by:

  
Caroline Lee (Dec 16, 2022 15:17 GMT)

**Mrs C Lee**  
(Chair of Trustees)  
Date: Dec 16, 2022

The notes on pages 38 to 62 form part of these financial statements.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**STATEMENT OF CASH FLOWS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

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|   | Note   | 2022<br>£        | 2021<br>£ |
|---|--------|------------------|-----------|
| <b>Cash flows from operating activities</b>             |        |                  |           |
| Net cash provided by operating activities               | 18     | <b>86,215</b>    | 17,805    |
| <b>Cash flows from investing activities</b>             | 19     | <b>(190,287)</b> | (8,225)   |
| <b>Change in cash and cash equivalents in the year</b>  |        | <b>(104,072)</b> | 9,580     |
| Cash and cash equivalents at the beginning of the year  |        | <b>174,552</b>   | 164,972   |
| <b>Cash and cash equivalents at the end of the year</b> | 20, 21 | <b>70,480</b>    | 174,552   |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

(A company limited by guarantee)

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**NOTES TO THE FINANCIAL STATEMENTS**

FOR THE YEAR ENDED 31 AUGUST 2022

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**1. Accounting policies**

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

**1.1 Basis of preparation of financial statements**

The financial statements of the Academy, which is a public benefit entity under FRS 102, have been prepared under the historic 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 2021 to 2022 issued by ESFA, the Charities Act 2011 and the Companies Act 2006.

**1.2 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 Academy 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 has adequate resources to continue in operational existence for the foreseeable future and there are no material uncertainties about the Academy's ability to continue as a going concern, thus they continue to adopt the going concern basis of accounting in preparing the financial statements.

**1.3 Income**

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

- **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 year 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.

- **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.

1. Accounting policies (continued)

1.4 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's educational operations, including support costs and costs relating to the governance of the Academy apportioned to charitable activities.

All resources expended are inclusive of irrecoverable VAT.

1.5 Tangible fixed assets

Assets costing £1,000 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. Where tangible fixed assets have been acquired with unrestricted funds, depreciation on such assets is charged to the unrestricted fund.

Depreciation is provided on all tangible fixed assets other than freehold 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:

Depreciation is provided on the following bases:

|                         |                               |
|-------------------------|-------------------------------|
| Freehold property       | - Straight line over 50 years |
| Furniture and equipment | - Straight line over 4 years  |
| Computer equipment      | - Straight line over 3 years  |

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.

NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 AUGUST 2022

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**1. Accounting policies (continued)**

**1.6 Debtors**

Trade and other debtors are recognised at the settlement amount after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

**1.7 Cash at bank and in hand**

Cash at bank and in hand includes cash and short-term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

**1.8 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 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.

**1.9 Pensions**

Retirement benefits to employees of the Academy 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 so as to spread the cost of pensions over employees' working lives with the Academy 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 on the basis of 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 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 operating surplus 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.

**1. Accounting policies (continued)**

**1.10 Fund accounting**

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

Restricted fixed asset funds are resources which are to be applied to specific capital purposes imposed by the 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.

Investment income, gains and losses are allocated to the appropriate fund.

**2. Critical accounting estimates and areas of judgment**

Estimates and judgments 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 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 or income for pensions include the discount rate. Any changes in these assumptions, which are disclosed in note 22, 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 2019 has been used by the actuary in valuing the pensions liability at 31 August 2022. 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.

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CONISBROUGH IVANHOE PRIMARY ACADEMY  
(A company limited by guarantee)

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NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 AUGUST 2022

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3. Income from donations and capital grants

|                              | Unrestricted<br>funds<br>2022<br>£ | Restricted<br>fixed asset<br>funds<br>2022<br>£ | Total<br>funds<br>2022<br>£ | Total<br>funds<br>2021<br>£ |
|------------------------------|------------------------------------|---|-----------------------------|-----------------------------|
| Donated assets               | -                                  | 149,785   | <b>149,785</b>              | -                           |
| Capital grants               | -                                  | 336,053   | <b>336,053</b>              | 8,203                       |
| Educational visits and trips | 12,330                             | -   | <b>12,330</b>               | 5,102                       |
|                              | <u>12,330</u>                      | <u>485,838</u>                                  | <u><b>498,168</b></u>       | <u>13,305</u>               |
| Total 2021                   | <u>5,102</u>                       | <u>8,203</u>                                    | <u>13,305</u>               |                             |

CONISBROUGH IVANHOE PRIMARY ACADEMY  
(A company limited by guarantee)

NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 AUGUST 2022

4. Funding for the Academy's charitable activities

|   | Unrestricted<br>funds<br>2022<br>£ | Restricted<br>funds<br>2022<br>£ | Total<br>funds<br>2022<br>£ | Total<br>funds<br>2021<br>£ |
|---|------------------------------------|----------------------------------|-----------------------------|-----------------------------|
| <b><i>DfE/ESFA grants</i></b>   |                                    |                                  |                             |                             |
| General Annual Grant (GAG)  | -                                  | 1,402,152                        | <b>1,402,152</b>            | 1,317,199                   |
| Other DfE/ESFA grants   |                                    |                                  |                             |                             |
| UIFSM   | -                                  | 33,987                           | <b>33,987</b>               | 37,904                      |
| Pupil Premium   | -                                  | 125,631                          | <b>125,631</b>              | 113,343                     |
| Teachers Pay and Pension grants   | -                                  | 9,670                            | <b>9,670</b>                | 68,654                      |
| Other   | -                                  | 45,584                           | <b>45,584</b>               | 28,825                      |
|   | -                                  | 1,617,024                        | <b>1,617,024</b>            | 1,565,925                   |
| <b><i>Other Government grants</i></b>   |                                    |                                  |                             |                             |
| Nursery   | -                                  | 196,585                          | <b>196,585</b>              | 170,803                     |
| SEN funding   | -                                  | 49,751                           | <b>49,751</b>               | 42,499                      |
| Other local authority funding   | -                                  | 14,204                           | <b>14,204</b>               | 13,530                      |
|   | -                                  | 260,540                          | <b>260,540</b>              | 226,832                     |
| <b><i>Other income from the Academy's Education activities - Catering</i></b> | <b>43,777</b>                      | -                                | <b>43,777</b>               | -                           |
| <b><i>COVID-19 additional funding (DfE/ESFA)</i></b>                          |                                    |                                  |                             |                             |
| Catch-up Premium  | -                                  | 12,868                           | <b>12,868</b>               | 29,134                      |
| School led tutoring   | -                                  | 11,948                           | <b>11,948</b>               | -                           |
|   | -                                  | 24,816                           | <b>24,816</b>               | 29,134                      |
|   | <b>43,777</b>                      | <b>1,902,380</b>                 | <b>1,946,157</b>            | <b>1,821,891</b>            |
| Total 2021  | -                                  | 1,821,891                        | 1,821,891                   |                             |

The academy received £24,816 of funding for Covid-19 catch-up and school led tutoring which was all spent during the year leaving nil balance repayable to the ESFA.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

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**5. Income from other trading activities**

|                       | <b>Unrestricted<br/>funds<br/>2022<br/>£</b> | <b>Total<br/>funds<br/>2022<br/>£</b> | <b>Total<br/>funds<br/>2021<br/>£</b> |
|-----------------------|--|---------------------------------------|---------------------------------------|
| Fundraising events    | -  | -                                     | 9,148                                 |
| Other income          | 3,125  | <b>3,125</b>                          | 1,135                                 |
| Breakfast club income | 17,043                                       | <b>17,043</b>                         | 19,790                                |
|                       | <u>20,168</u>                                | <u><b>20,168</b></u>                  | <u>30,073</u>                         |
| Total 2021            | <u>30,073</u>                                | <u>30,073</u>                         |                                       |

**6. Investment income**

|                          | <b>Unrestricted<br/>funds<br/>2022<br/>£</b> | <b>Total<br/>funds<br/>2022<br/>£</b> | <b>Total<br/>funds<br/>2021<br/>£</b> |
|--------------------------|--|---------------------------------------|---------------------------------------|
| Deposit account interest | 22   | <b>22</b>                             | 21                                    |
|                          | <u>22</u>                                    | <u><b>22</b></u>                      | <u>21</u>                             |
| Total 2021               | <u>21</u>                                    | <u>21</u>                             |                                       |

**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

**7. Expenditure**

|                                  | <b>Staff Costs<br/>2022<br/>£</b> | <b>Premises<br/>2022<br/>£</b> | <b>Other<br/>2022<br/>£</b> | <b>Total<br/>2022<br/>£</b> | <b>Total<br/>2021<br/>£</b> |
|----------------------------------|-----------------------------------|--------------------------------|-----------------------------|-----------------------------|-----------------------------|
| Academy's educational operations |                                   |                                |                             |                             |                             |
| Direct costs                     | 1,333,912                         | -                              | 143,417                     | <b>1,477,329</b>            | 1,374,633                   |
| Allocated support costs          | 352,727                           | 82,750                         | 308,636                     | <b>744,113</b>              | 555,947                     |
|                                  | <u>1,686,639</u>                  | <u>82,750</u>                  | <u>452,053</u>              | <u><b>2,221,442</b></u>     | <u>1,930,580</u>            |
| Total 2021                       | <u>1,501,709</u>                  | <u>71,601</u>                  | <u>357,270</u>              | <u>1,930,580</u>            |                             |

**8. Analysis of expenditure by activities**

|                                  | <b>Activities<br/>undertaken<br/>directly<br/>2022<br/>£</b> | <b>Support costs<br/>2022<br/>£</b> | <b>Total<br/>funds<br/>2022<br/>£</b> | <b>Total<br/>funds<br/>2021<br/>£</b> |
|----------------------------------|--|-------------------------------------|---------------------------------------|---------------------------------------|
| Academy's educational operations | <u>1,477,329</u>   | <u>744,113</u>                      | <u><b>2,221,442</b></u>               | <u>1,930,580</u>                      |
| Total 2021                       | <u>1,374,633</u>   | <u>555,947</u>                      | <u>1,930,580</u>                      |                                       |

**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

**8. Analysis of expenditure by activities (continued)**

**Analysis of support costs**

|                     | <b>Activities</b> | <b>Total</b>          | <b>Total</b>   |
|---------------------|-------------------|-----------------------|----------------|
|                     | <b>2022</b>       | <b>funds</b>          | <b>funds</b>   |
|                     | <b>£</b>          | <b>2022</b>           | <b>2021</b>    |
|                     |                   | <b>£</b>              | <b>£</b>       |
| Support staff costs | 352,727           | <b>352,727</b>        | 222,456        |
| Depreciation        | 6,885             | <b>6,885</b>          | 5,306          |
| Technology costs    | 33,687            | <b>33,687</b>         | 24,470         |
| Premises costs      | 82,750            | <b>82,750</b>         | 76,787         |
| Other Support costs | 243,721           | <b>243,721</b>        | 169,867        |
| Governance Costs    | 24,343            | <b>24,343</b>         | 14,030         |
| Other staff costs   | -                 | -                     | 43,031         |
|                     | <u>744,113</u>    | <u><b>744,113</b></u> | <u>555,947</u> |
| Total 2021          | <u>555,947</u>    | <u>555,947</u>        |                |

**9. Net (expenditure)/income**

Net (expenditure)/income for the year includes:

|                                       | <b>2022</b>          | <b>2021</b>   |
|---------------------------------------|----------------------|---------------|
|                                       | <b>£</b>             | <b>£</b>      |
| Operating lease rentals               | <b>8,457</b>         | 2,615         |
| Depreciation of tangible fixed assets | <b>57,912</b>        | 50,063        |
| Internal audit services               | <b>3,443</b>         | 2,330         |
| Fees paid to auditors for:            |                      |               |
| - audit                               | <b>11,000</b>        | 9,500         |
| - other services                      | <b>9,900</b>         | 1,500         |
|                                       | <u><b>99,712</b></u> | <u>66,408</u> |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

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**10. Staff**

**a. Staff costs**

Staff costs during the year were as follows:

|                           | <b>2022</b>            | 2021            |
|---------------------------|------------------------|-----------------|
|                           | <b>£</b>               | £               |
| Wages and salaries        | <b>1,212,320</b>       | 1,086,918       |
| Social security costs     | <b>103,455</b>         | 84,812          |
| Pension costs             | <b>368,909</b>         | 278,901         |
|                           | <hr/> <b>1,684,684</b> | <hr/> 1,450,631 |
| Supply teacher costs      | -                      | 8,047           |
| Other agency costs        | <b>1,955</b>           | 40,056          |
| Staff restructuring costs | -                      | 2,975           |
|                           | <hr/> <b>1,686,639</b> | <hr/> 1,501,709 |
|                           | <hr/> <hr/>            | <hr/> <hr/>     |

Staff restructuring costs comprise:

|                    | <b>2022</b> | 2021        |
|--------------------|-------------|-------------|
|                    | <b>£</b>    | £           |
| Severance payments | -           | 2,975       |
|                    | <hr/> -     | <hr/> 2,975 |
|                    | <hr/> <hr/> | <hr/> <hr/> |

**b. Special staff severance payments**

Included in staff restructuring costs are non-statutory/non-contractual severance payments totalling £nil (2021: £1,547).

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**  
**(A company limited by guarantee)**

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**NOTES TO THE FINANCIAL STATEMENTS**  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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**10. Staff (continued)**

**c. Staff numbers**

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

|                     | <b>2022</b>           | 2021           |
|---------------------|-----------------------|----------------|
|                     | <b>No.</b>            | No.            |
| Teachers            | <b>19</b>             | 20             |
| Admin/Support staff | <b>37</b>             | 32             |
| Management          | <b>3</b>              | 3              |
|                     | <hr/> <b>59</b> <hr/> | <hr/> 55 <hr/> |

The average headcount expressed as full-time equivalents was:

|                     | <b>2022</b>           | 2021           |
|---------------------|-----------------------|----------------|
|                     | <b>No.</b>            | No.            |
| Teachers            | <b>17</b>             | 18             |
| Admin/Support staff | <b>18</b>             | 19             |
| Management          | <b>3</b>              | 3              |
|                     | <hr/> <b>38</b> <hr/> | <hr/> 40 <hr/> |

**d. Higher paid staff**

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

|                               | <b>2022</b>          | 2021          |
|-------------------------------|----------------------|---------------|
|                               | <b>No.</b>           | No.           |
| In the band £70,001 - £80,000 | <b>1</b>             | 1             |
|                               | <hr/> <b>1</b> <hr/> | <hr/> 1 <hr/> |

**e. Key management personnel**

The key management personnel of the Academy 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 was £369,039 (2021 - £320,937).

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**CONISBROUGH IVANHOE PRIMARY ACADEMY****(A company limited by guarantee)**

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**NOTES TO THE FINANCIAL STATEMENTS***FOR THE YEAR ENDED 31 AUGUST 2022*

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**11. Trustees' remuneration and expenses**

One or more Trustees has been paid remuneration or has received other benefits from an employment with the Academy. The principal and other staff Trustees only receive remuneration in respect of services they provide undertaking the roles of principal and staff members under their contracts of employment. The value of Trustees' remuneration and other benefits was as follows:

|  |                            | <b>2022</b>           | 2021           |
|--|----------------------------|-----------------------|----------------|
|  |                            | <b>£</b>              | £              |
| Mr J P Brian, Accounting Officer / Headteacher | Remuneration               | <b>70,000 -</b>       | 70,000 -       |
|  |                            | <b>75,000</b>         | 75,000         |
|  | Pension contributions paid | <b>15,000 -</b>       | 15,000 -       |
| Mrs R Matthews, Staff Trustee                  |                            | <b>20,000</b>         | 20,000         |
|  | Remuneration               | <b>35,000 -</b>       | 30,000 -       |
|  |                            | <b>40,000</b>         | 35,000         |
| Mrs V Sedgwick, Staff Trustee                  | Pension contributions paid | <b>5,000 - 10,000</b> | 5,000 - 10,000 |
|  | Remuneration               | <b>20,000 -</b>       | 30,000 -       |
|  |                            | <b>25,000</b>         | 35,000         |
|  | Pension contributions paid | <b>5,000 - 10,000</b> | 5,000 - 10,000 |

During the year ended 31 August 2022, no Trustee expenses have been incurred (2021 - £NIL).

**12. Trustees' and Officers' insurance**

In accordance with normal commercial practice, the Academy has purchased insurance to protect Trustees and officers from claims arising from negligent acts, errors or omissions occurring whilst on academy business. The insurance provides cover up to £10,000,000 on any one claim and the cost for the year ended 31 August 2022 was £6,679 (2021 - £6,291). The cost of this insurance is included in the total insurance cost.

CONISBROUGH IVANHOE PRIMARY ACADEMY  
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NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 AUGUST 2022

13. Tangible fixed assets

|                          | Freehold<br>property<br>£ | Furniture and<br>equipment<br>£ | Computer<br>equipment<br>£ | Total<br>£       |
|--------------------------|---------------------------|---------------------------------|----------------------------|------------------|
| <b>Cost or valuation</b> |                           |                                 |                            |                  |
| At 1 September 2021      | 2,054,694                 | 53,294                          | 137,233                    | 2,245,221        |
| Additions                | 526,362                   | -                               | -                          | 526,362          |
| At 31 August 2022        | <u>2,581,056</u>          | <u>53,294</u>                   | <u>137,233</u>             | <u>2,771,583</u> |
| <b>Depreciation</b>      |                           |                                 |                            |                  |
| At 1 September 2021      | 258,279                   | 53,294                          | 121,826                    | 433,399          |
| Charge for the year      | 47,987                    | -                               | 9,925                      | 57,912           |
| At 31 August 2022        | <u>306,266</u>            | <u>53,294</u>                   | <u>131,751</u>             | <u>491,311</u>   |
| <b>Net book value</b>    |                           |                                 |                            |                  |
| At 31 August 2022        | <u>2,274,790</u>          | <u>-</u>                        | <u>5,482</u>               | <u>2,280,272</u> |
| At 31 August 2021        | <u>1,796,415</u>          | <u>-</u>                        | <u>15,407</u>              | <u>1,811,822</u> |

14. Debtors

|                                | 2022<br>£      | 2021<br>£     |
|--------------------------------|----------------|---------------|
| <b>Due within one year</b>     |                |               |
| Trade debtors                  | 1,610          | 260           |
| Prepayments and accrued income | 374,338        | 54,802        |
| VAT                            | 7,371          | 12,852        |
|                                | <u>383,319</u> | <u>67,914</u> |

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**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

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**15. Creditors: Amounts falling due within one year**

|  | <b>2022</b>                | 2021               |
|--|----------------------------|--------------------|
|  | <b>£</b>                   | £                  |
| Trade creditors                        | <b>1,476</b>               | 8,589              |
| Other taxation and social security     | <b>6,023</b>               | 6,999              |
| Accruals and deferred income           | <b>354,801</b>             | 41,002             |
|  | <hr/> <b>362,300</b> <hr/> | <hr/> 56,590 <hr/> |
|  | <b>2022</b>                | 2021               |
|  | <b>£</b>                   | £                  |
| Deferred income at 1 September 2021    | <b>22,175</b>              | 25,696             |
| Resources deferred during the year     | <b>20,168</b>              | 22,175             |
| Amounts released from previous periods | <b>(22,175)</b>            | (25,696)           |
|  | <hr/> <b>20,168</b> <hr/>  | <hr/> 22,175 <hr/> |

The deferred income relates to universal infant free school meals allocated for the 2022/23 year based on pupil numbers.

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NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 AUGUST 2022

16. Statement of funds

|                                     | Balance at 1<br>September<br>2021<br>£ | Income<br>£      | Expenditure<br>£   | Transfers<br>in/out<br>£ | Gains/<br>(Losses)<br>£ | Balance at 31<br>August 2022<br>£ |
|-------------------------------------|--|------------------|--------------------|--------------------------|-------------------------|-----------------------------------|
| <b>Unrestricted funds</b>           |  |                  |                    |                          |                         |                                   |
| General Funds                       | 112,285                                | 76,297           | (77,827)           | (19,256)                 | -                       | 91,499                            |
| <b>Restricted general funds</b>     |  |                  |                    |                          |                         |                                   |
| General Annual Grant (GAG)          | 51,103                                 | 1,402,152        | (1,453,255)        | -                        | -                       | -                                 |
| Pupil Premium                       | -                                      | 125,631          | (125,631)          | -                        | -                       | -                                 |
| UIFSM                               | -                                      | 33,987           | (33,987)           | -                        | -                       | -                                 |
| Sports Premium                      | -                                      | 18,860           | (18,860)           | -                        | -                       | -                                 |
| Other Grants                        | -                                      | 319,550          | (319,550)          | -                        | -                       | -                                 |
| Non-Government Revenue              | 1,220                                  | 2,200            | (3,420)            | -                        | -                       | -                                 |
| Pension reserve                     | (1,264,000)                            | -                | (131,000)          | -                        | 923,000                 | (472,000)                         |
|                                     | (1,211,677)                            | 1,902,380        | (2,085,703)        | -                        | 923,000                 | (472,000)                         |
| <b>Restricted fixed asset funds</b> |  |                  |                    |                          |                         |                                   |
| Restricted fixed asset funds        | 1,833,090                              | 485,838          | (57,912)           | 19,256                   | -                       | 2,280,272                         |
| <b>Total Restricted funds</b>       | <b>621,413</b>                         | <b>2,388,218</b> | <b>(2,143,615)</b> | <b>19,256</b>            | <b>923,000</b>          | <b>1,808,272</b>                  |
| <b>Total funds</b>                  | <b>733,698</b>                         | <b>2,464,515</b> | <b>(2,221,442)</b> | <b>-</b>                 | <b>923,000</b>          | <b>1,899,771</b>                  |

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**NOTES TO THE FINANCIAL STATEMENTS**

*FOR THE YEAR ENDED 31 AUGUST 2022*

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**16. Statement of funds (continued)**

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

Restricted general funds

General annual grant (GAG) - The Academy's principle funding stream received from the Education & Skills Funding Agency. This must be used to fund the normal running costs of the Academy for the benefit of existing students.

Pupil premium - DfE funding to address the current underlying inequalities between children eligible for free school meals (FSM) and their wealthier peers by ensuring that funding to tackle the disadvantage reaches the pupils who need it most.

UIFSM - The Universal Infant Free School Meals (UIFSM) grant enables schools to provide free school meals to all pupils in reception, year 1 and year 2.

Sports Premium - The ESFA provided Primary Schools with a PE and Sport Premium to improve the quality of the PE and sport activities they offer their pupils.

Other Grants - miscellaneous funding towards specific purposes.

Non-government revenue - miscellaneous non-government revenue towards specific purposes.

Pension reserve - The deficit on the Local Government Pension Scheme has been recognised against restricted funds in order to match it against GAG as recommended by the ESFA Accounts Direction.

Transfers - There is a transfer from unrestricted to fixed asset funds of £19,256 for the amount that was spent on purchasing assets in the year using unrestricted revenue.

Under the funding agreement with the Secretary of State, the Academy was not subject to a limit on the amount of GAG it could carry forward at 31 August 2022.

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NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 AUGUST 2022

16. Statement of funds (continued)

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

|                                     | Balance at<br>1 September<br>2020<br>£ | Income<br>£ | Expenditure<br>£ | Transfers<br>in/out<br>£ | Gains/<br>(Losses)<br>£ | Balance at<br>31 August<br>2021<br>£ |
|-------------------------------------|--|-------------|------------------|--------------------------|-------------------------|--------------------------------------|
| <b>Unrestricted funds</b>           |  |             |                  |                          |                         |                                      |
| General Funds                       | 104,038                                | 35,196      | (26,949)         | -                        | -                       | 112,285                              |
| <b>Restricted general funds</b>     |  |             |                  |                          |                         |                                      |
| General Annual Grant (GAG)          | -                                      | 1,395,518   | (1,342,869)      | (1,546)                  | -                       | 51,103                               |
| Pupil Premium                       | -                                      | 113,343     | (111,831)        | (1,512)                  | -                       | -                                    |
| UIFSM                               | -                                      | 37,904      | (38,000)         | 96                       | -                       | -                                    |
| Sports Premium                      | -                                      | 18,850      | (18,850)         | -                        | -                       | -                                    |
| Other Grants                        | -                                      | 253,106     | (256,068)        | 2,962                    | -                       | -                                    |
| Non-Government Revenue              | -                                      | 3,170       | (1,950)          | -                        | -                       | 1,220                                |
| Pension reserve                     | (1,070,000)                            | -           | (84,000)         | -                        | (110,000)               | (1,264,000)                          |
|                                     | (1,070,000)                            | 1,821,891   | (1,853,568)      | -                        | (110,000)               | (1,211,677)                          |
| <b>Restricted fixed asset funds</b> |  |             |                  |                          |                         |                                      |
| Restricted fixed asset funds        | 1,874,950                              | 8,203       | (50,063)         | -                        | -                       | 1,833,090                            |
| <b>Total Restricted funds</b>       | 804,950                                | 1,830,094   | (1,903,631)      | -                        | (110,000)               | 621,413                              |
| <b>Total funds</b>                  | 908,988                                | 1,865,290   | (1,930,580)      | -                        | (110,000)               | 733,698                              |

CONISBROUGH IVANHOE PRIMARY ACADEMY  
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NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 AUGUST 2022

17. Analysis of net assets between funds

Analysis of net assets between funds - current year

|  | Unrestricted<br>funds<br>2022<br>£ | Restricted<br>funds<br>2022<br>£ | Restricted<br>fixed asset<br>funds<br>2022<br>£ | Total<br>funds<br>2022<br>£ |
|--|------------------------------------|----------------------------------|---|-----------------------------|
| Tangible fixed assets                  | -                                  | -                                | 2,280,272                                       | <b>2,280,272</b>            |
| Current assets                         | 91,499                             | 362,300                          | -   | <b>453,799</b>              |
| Creditors due within one year          | -                                  | (362,300)                        | -   | <b>(362,300)</b>            |
| Provisions for liabilities and charges | -                                  | (472,000)                        | -   | <b>(472,000)</b>            |
| <b>Total</b>                           | <b>91,499</b>                      | <b>(472,000)</b>                 | <b>2,280,272</b>                                | <b>1,899,771</b>            |

Analysis of net assets between funds - prior year

|  | Unrestricted<br>funds<br>2021<br>£ | Restricted<br>funds<br>2021<br>£ | Restricted<br>fixed asset<br>funds<br>2021<br>£ | Total<br>funds<br>2021<br>£ |
|--|------------------------------------|----------------------------------|---|-----------------------------|
| Tangible fixed assets                  | -                                  | -                                | 1,811,822                                       | 1,811,822                   |
| Current assets                         | 112,285                            | 108,913                          | 21,268  | 242,466                     |
| Creditors due within one year          | -                                  | (56,590)                         | -   | (56,590)                    |
| Provisions for liabilities and charges | -                                  | (1,264,000)                      | -   | (1,264,000)                 |
| <b>Total</b>                           | <b>112,285</b>                     | <b>(1,211,677)</b>               | <b>1,833,090</b>                                | <b>733,698</b>              |

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**CONISBROUGH IVANHOE PRIMARY ACADEMY****(A company limited by guarantee)**

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**NOTES TO THE FINANCIAL STATEMENTS****FOR THE YEAR ENDED 31 AUGUST 2022**

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

|  | 2022             | 2021     |
|--|------------------|----------|
|  | £                | £        |
| Net income/(expenditure) for the year (as per statement of financial activities) | <b>243,073</b>   | (65,290) |
| <b>Adjustments for:</b>  |                  |          |
| Depreciation   | <b>57,912</b>    | 50,063   |
| Capital grants from DfE and other capital income                                 | <b>(336,053)</b> | (8,203)  |
| Interest receivable  | <b>(22)</b>      | (21)     |
| Defined benefit pension scheme cost less contributions payable                   | <b>109,000</b>   | 63,000   |
| Defined benefit pension scheme finance cost                                      | <b>22,000</b>    | 21,000   |
| Decrease in stocks   | -                | 500      |
| (Increase) in debtors  | <b>(315,405)</b> | (1,596)  |
| Increase/(decrease) in creditors   | <b>305,710</b>   | (41,648) |
| <b>Net cash provided by operating activities</b>                                 | <b>86,215</b>    | 17,805   |

**19. Cash flows from investing activities**

|  | 2022             | 2021     |
|--|------------------|----------|
|  | £                | £        |
| Purchase of tangible fixed assets            | <b>(526,362)</b> | (16,449) |
| Capital grants from DfE Group                | <b>336,053</b>   | 8,203    |
| Interest received                            | <b>22</b>        | 21       |
| <b>Net cash used in investing activities</b> | <b>(190,287)</b> | (8,225)  |

**20. Analysis of cash and cash equivalents**

|  | 2022          | 2021    |
|--|---------------|---------|
|  | £             | £       |
| Cash in hand and at bank               | <b>70,480</b> | 174,552 |
| <b>Total cash and cash equivalents</b> | <b>70,480</b> | 174,552 |

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**NOTES TO THE FINANCIAL STATEMENTS**  
*FOR THE YEAR ENDED 31 AUGUST 2022*

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**21. Analysis of changes in net debt**

|                          | At 1<br>September<br>2021<br>£ | Cash flows<br>£  | At 31 August<br>2022<br>£ |
|--------------------------|--------------------------------|------------------|---------------------------|
| Cash at bank and in hand | 174,552                        | (104,072)        | 70,480                    |
|                          | <u>174,552</u>                 | <u>(104,072)</u> | <u>70,480</u>             |

**22. Pension commitments**

The Academy'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 South Yorkshire Pensions Authority. Both are multi-employer defined benefit schemes.

The latest actuarial valuation of the TPS related to the period ended 31 March 2016 and of the LGPS 31 March 2019.

There were no outstanding or prepaid contributions at either the beginning or the end of the financial year.

**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 full-time 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.

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 AUGUST 2022

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**22. Pension commitments (continued)**

**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 4 years. The aim of the review is to specify 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 2016. The valuation report was published by the Department for Education on 5 March 2019. The key elements of the valuation and subsequent consultation are:

- employer contribution rates set at 23.68% of pensionable pay (including a 0.08% administration levy)
- total scheme liabilities (pensions currently in payment and the estimated cost of future benefits) for service to the effective date of £218,100 million and notional assets (estimated future contributions together with the notional investments held at the valuation date) of £196,100 million, giving a notional past service deficit of £22,000 million
- the SCAPE rate, set by HMT, is used to determine the notional investment return. The current SCAPE rate is 2.4% above the rate of CPI, assumed real rate of return is 2.4% in excess of prices and 2% in excess of earnings. The rate of real earnings growth is assumed to be 2.2%. The assumed nominal rate of return including earnings growth is 4.45%.

The next valuation result is due to be implemented from 1 April 2024.

The employer's pension costs paid to TPS in the year amounted to £167,034 (2021 - £138,096).

A copy of the valuation report and supporting documentation is on the Teachers' Pensions website (<https://www.teacherspensions.co.uk/news/employers/2019/04/teachers-pensions-valuation-report.aspx>).

Under the definitions set out in FRS 102, the TPS is an unfunded multi-employer pension scheme. The Academy has accounted for its contributions to the scheme as if it were a defined contribution scheme. The Academy 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 2022 was £109,000 (2021 - £99,308), of which employer's contributions totalled £92,875 (2021 - £77,805) and employees' contributions totalled £ 16,125 (2021 - £21,503). The agreed contribution rates for future years are 15 per cent for employers and 5.5 to 12.5 per cent for employees.

As described in note the LGPS obligation relates to the employees of the Academy, who were the employees transferred as part of the conversion from the maintained school and new employees who were eligible to, and did, join the Scheme in the year. The obligation in respect of employees who transferred on conversion represents their cumulative service at both the predecessor school and the Academy at the balance sheet date.

Parliament has agreed, at the request of the Secretary of State for Education, to a guarantee that, in the event of academy closure, outstanding Local Government Pension Scheme liabilities would be met by the Department for Education. The guarantee came into force on 18 July 2013.

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**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 AUGUST 2022**

**22. Pension commitments (continued)**

**Principal actuarial assumptions**

|  | <b>2022</b> | 2021 |
|--|-------------|------|
|  | %           | %    |
| Rate of increase in salaries                       | <b>4.20</b> | 4.05 |
| Rate of increase for pensions in payment/inflation | <b>3.20</b> | 2.90 |
| Discount rate for scheme liabilities               | <b>4.25</b> | 1.70 |

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

|                      | <b>2022</b> | 2021  |
|----------------------|-------------|-------|
|                      | Years       | Years |
| Retiring today       |             |       |
| Males                | <b>22.6</b> | 22.5  |
| Females              | <b>25.4</b> | 25.3  |
| Retiring in 20 years |             |       |
| Males                | <b>24.1</b> | 24.0  |
| Females              | <b>27.3</b> | 27.2  |

**Sensitivity analysis**

|  | <b>2022</b> | 2021 |
|--|-------------|------|
|  | £000        | £000 |
| Discount rate +0.1%                    | <b>(32)</b> | (45) |
| Mortality assumption - 1 year increase | <b>56</b>   | 65   |
| CPI rate +0.1%                         | <b>29</b>   | 45   |
| Pay growth +0.1%                       | <b>3</b>    | 5    |

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**22. Pension commitments (continued)****Share of scheme assets**

The Academy's share of the assets in the scheme was:

|                                     | <b>At 31 August<br/>2022</b> | At 31 August<br>2021 |
|-------------------------------------|------------------------------|----------------------|
|                                     | £                            | £                    |
| Equities                            | <b>641,000</b>               | 406,000              |
| Bonds                               | <b>183,000</b>               | 178,000              |
| Property                            | <b>83,000</b>                | 72,000               |
| Cash and other liquid assets        | <b>9,000</b>                 | 8,000                |
| Other                               | -                            | 175,000              |
| <b>Total market value of assets</b> | <b>916,000</b>               | 839,000              |

The actual return on scheme assets was £(16,000) (2021 - £122,000).

The amounts recognised in the Statement of financial activities are as follows:

|   | <b>2022</b>      | 2021      |
|---|------------------|-----------|
|   | £                | £         |
| Current service cost  | <b>(195,000)</b> | (142,000) |
| Interest income   | <b>15,000</b>    | 12,000    |
| Interest cost   | <b>(37,000)</b>  | (31,000)  |
| Administrative expenses   | -                | (2,000)   |
| <b>Total amount recognised in the Statement of financial activities</b> | <b>(217,000)</b> | (163,000) |

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

|                          | <b>2022</b>      | 2021      |
|--------------------------|------------------|-----------|
|                          | £                | £         |
| <b>At 1 September</b>    | <b>2,103,000</b> | 1,705,000 |
| Current service cost     | <b>195,000</b>   | 142,000   |
| Interest cost            | <b>37,000</b>    | 31,000    |
| Employee contributions   | <b>23,000</b>    | 20,000    |
| Actuarial (gains)/losses | <b>(953,000)</b> | 221,000   |
| Benefits paid            | <b>(17,000)</b>  | (16,000)  |
| <b>At 31 August</b>      | <b>1,388,000</b> | 2,103,000 |

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**FOR THE YEAR ENDED 31 AUGUST 2022**

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**22. Pension commitments (continued)**

Changes in the fair value of the Academy's share of scheme assets were as follows:

|                          | <b>2022</b>     | 2021     |
|--------------------------|-----------------|----------|
|                          | £               | £        |
| <b>At 1 September</b>    | <b>839,000</b>  | 635,000  |
| Interest income          | <b>15,000</b>   | 12,000   |
| Actuarial (losses)/gains | <b>(30,000)</b> | 111,000  |
| Employer contributions   | <b>86,000</b>   | 79,000   |
| Employee contributions   | <b>23,000</b>   | 20,000   |
| Benefits paid            | <b>(17,000)</b> | (16,000) |
| Administrative expenses  | -               | (2,000)  |
| <b>At 31 August</b>      | <b>916,000</b>  | 839,000  |

**23. Operating lease commitments**

At 31 August 2022 the Academy had commitments to make future minimum lease payments under non-cancellable operating leases as follows:

|  | <b>2022</b>   | 2021   |
|--|---------------|--------|
|  | £             | £      |
| Not later than 1 year                        | <b>8,456</b>  | 8,456  |
| Later than 1 year and not later than 5 years | <b>21,144</b> | 29,600 |
|  | <b>29,600</b> | 38,056 |

**24. Members' 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.

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**CONISBROUGH IVANHOE PRIMARY ACADEMY**

**(A company limited by guarantee)**

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**NOTES TO THE FINANCIAL STATEMENTS**

*FOR THE YEAR ENDED 31 AUGUST 2022*

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**25. Related party transactions**

Owing to the nature of the Academy and the composition of the Board of Trustees being drawn from local public and private sector organisations, transactions may take place with organisations in which the trustees have an interest. All transactions involving such organisations are conducted in accordance with the requirements of the Academy Trust Handbook, including notifying the ESFA of all transactions made on or after 1 April 2019 and obtaining their approval where required, and with the Academy's financial regulations and normal procurement procedures relating to connected and related party transactions.

Expenditure related party transactions

In the year the Trust did not report any expenditure related party transactions (2021: nil).

Related employments

Joe Brian (Head Teacher) is in a relationship with Lisa Mills (Deputy Head).

Natalie Cain (Learning Support Assistant) is the sister of Lisa Mills.

All the above named employees are paid within the normal pay range and receive no special treatment as a result of their relationship.