

Lee Chapel Multi Academy Trust

(A Company Limited by Guarantee)

Annual Report and Financial Statements
For the year ended 31 August 2025

Lee Chapel Multi Academy Trust

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Lee Chapel Multi Academy Trust

Reference and Administrative Details

Members	C O'Callaghan S Tomlinson M Smith R Pollington
Trustees	D Kavanagh S Robson M Betteridge I Randle J Hann J Bird S Burke-Terson appointed 27/11/24 G Justham appointed 16/7/25
Company Secretary	V Carter
Senior Management Team:	
Head Teacher: Lee Chapel Primary School	S L Jackson
Head of School: Northlands Primary School	B Figg
Head of School: Ryedene Primary School	A Toomer
Head of School: Greensted Primary School	S Chetty
Head of School: Phoenix Primary School	M Kirkham
Head Teacher: Chapel Hill Primary School	S L Jackson
Chief Financial Officer	A Burrows
Principal and Registered Office	The Knares Basildon Essex SS16 5RU
Company Registration Number	07673871 (England and Wales)
Independent Auditor	Moore Kingston Smith LLP 9 Appold Street London EC2A 2AP
Bankers	Lloyds Bank 14-20 Town Square Basildon Essex SS14 1DU

Lee Chapel Multi Academy Trust

Governance Report

For the year ended 31 August 2025

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

The academy trust operates six primary schools for pupils aged 2 – 11 serving a catchment area in Basildon, Essex. Its 6 academies have a combined pupil capacity of 3325 (includes nursery pupils full and part time) and had a roll of 3745 in the school census in October 2024. In addition to the above Chapel Hill nursery takes from the age of 0 – 2.

	Capacity includes Nursery	Roll
Lee Chapel Primary School	992	1073
Greensted Primary School	504	503
Northlands Primary School	720	728
Ryedene Primary School	470	446
The Phoenix Primary School	780	693
Chapel Hill Primary School	420	217
Total	3,745	3660

Chapel Hill Primary School & Nursery opened to pupils on 2nd September 2024. The initial proposal was for 1 reception class and to increase annually. However, due to the local demand in the area the school has opened with 3 classes: A Reception Class, a Mixed Years 1 & 2 and a Mixed Years 3 & 4 Class.

Structure, Governance and Management

Constitution

The academy trust is a company limited by guarantee and an exempt charity. The charitable company's Memorandum and Articles of Association are the primary governing documents of the academy trust.

The trustees of Lee Chapel Multi Academy Trust are also the directors of the charitable company for the purposes of company law. The charitable company operates as Lee Chapel Multi Academy Trust.

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.

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.

Directors'/Trustees' Indemnities

The Charitable Company has Trustee liability insurance through Zurich Insurance which all the academies subscribe to.

Method of Recruitment and Appointment or Election of Trustees

The Members of the Academy Trust shall comprise:

- a. the members of the company on the date of the adoption of the articles (01 August 2011); and
- b. any person appointed under Article ("The Members may agree by passing a special resolution to appoint such additional Members as they think fit") - provided that at any time the minimum number of Members shall not be less than three. An employee of the Academy Trust cannot be a Member of the Academy Trust.

The Trustees of the Multi Academy Trust comprises the following from Lee Chapel Governing Body: the Headteacher, Chair, Vice Chair, Governor and a Parent; Greensted Governing Body the Chair and a Parent, Northlands, Ryedene and Phoenix each schools Chair of Governors and independently 2 community governors.

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The Trust advertises local governing body and trust vacancies through Essex County Council. New trustees or members are voted onto the board at their meetings.

Lee Chapel Academy's Governing Body comprises the Head Teacher, two Staff Governors (who are employees of Multi Academy Trust), two parent Governors and five Community Governors. The Articles of Association require that there be a minimum of three Governors. The term is normally four years although the Governors can resign at any time during this period.

Greensted Primary School Academy's Governing Body comprises of the head teacher, two staff governors (who are employees of the Multi Academy Trust) three parent governors and four community governors. The term is normally 4 years although governors can resign at any time during this period.

The Phoenix Primary School & Nursery Governing Body comprises of the Head of School, one staff governor (who is an employee of the Multi Academy Trust) two parent governors and five co-opted governors. The term is normally 4 years although governors can resign at any time during this period.

Ryedene Primary & Nursery School Governing Body comprises of the head teacher, two staff governors (who are employees of the Multi Academy Trust) one parent governor and four co-opted governors. The term is normally 4 years although governors can resign at any time during this period.

Northlands Primary School & Nursery Academy's Governing Body comprises of the Head of School, two staff governors (who are employees of the Multi Academy Trust), two parent governors and 4 co-opted governors.

Chapel Hill Primary School and Nursery does not have a local governing body as this is run by the Trust.

Parent Governors for all schools are elected by the parents of current pupils.

Staff Governors for all schools are elected by the staff currently employed by the school.

With regards to the appointment of Community Governors, the Governing body will ensure that consideration is given to the skills mix of the Governors so that they can contribute fully ensure the Academy's development.

Policies and Procedures Adopted for the Induction and Training of Trustees & Governors

The Trust subscribes to the National Governance Association who run online Governor training including Induction courses for new Governors. The Trust also subscribes to The Key and Governor hub where there are various resources and alternative training for governors.

The Trust runs training evenings concentrating on specific subjects. All the governors are invited to attend the training sessions, which are held at the schools.

Organisational Structure

The Directors are responsible for setting general Trust policy, approving budgets, monitoring the Academies, budget monitoring and making major decisions about the direction of the Academy Trust, capital expenditure and senior staff appointments.

The Chief Executive is the Accounting Officer and is responsible to the Board of Directors for the overall performance of the Trust and its constituent schools. Local Governing Bodies are responsible for the strategic direction and financial oversight of their schools and holding their Headteacher / Heads of school to account for the performance of the school.

Head teachers / Heads of school are responsible for the overall performance of their schools and meeting the objectives set for them by their Local Governing Body and the CEO.

In line with the Trust's scheme of delegation the academy trust board meets once a term. The Finance & Audit committee meets at least termly.

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For the year ended 31 August 2025

All local Governing Bodies meet at least once a term and a number have established committees which meet regularly.

Each committee has Terms of Reference, which delegate some decisions to each committee from the board of trustees. The local governing body meeting receives reports from the committees.

At the first local governing body meeting in the autumn term, the governors elect the chair & vice chair of the local governing body and any committees.

The local Governing Body approves the draft plans and budgets presented by the head teacher / head of school. The Trust's Finance & Audit committee reviews the budgets presented and recommend after rigorous questioning to the Board for approval in the summer term. The local governing bodies monitor the budget and ensure that any decisions made are within the powers delegated to them. Any financial agreements in excess of the committee's limits are presented to the Trusts Finance & Audit committee and ultimately the board of trustees for approval.

The day to day running of the Academies is delegated to the Head teacher or head of school. The Multi Academy Trust Accounting Officer as required by the Funding Agreement with the Department of Education is Lee Chapel Primary School's head teacher.

Arrangements for setting pay and remuneration of key management personnel

The trustees have delegated the responsibility of remuneration for key management personnel to the CEO / head teacher of Lee Chapel, chair of the board and the individual chair of governors from the local governing body. All Head teachers' pay awards must be awarded and paid within the range for the size of the school (determined by the pupil numbers) as agreed by the Board of Directors. Decisions regarding performance related pay are made at the head teachers performance review and recommendations are forwarded to the local governing body and the board of directors are informed. The local Governing Body Chair or Vice Chair conduct the review for the Headteacher of Lee Chapel Primary School and Nursery as the salary is exclusively funded by the school (the head teacher is not paid for the CEO role and does not receive any remuneration from the Trust).

The CFO performance and pay review is conducted by the CEO and the chair of the Board of Directors.

Directors/Trustees receive no pay or remuneration for acting as Directors/Trustees.

Trade union facility time

The trust had no employees who were relevant union officials during the year.

Related Parties and other Connected Charities and Organisations

Lee Chapel Primary School Academy became Lee Chapel Multi Academy Trust and the sponsor of Greensted Junior School on 1st September 2012. On 1st September 2016, the following schools were sponsored: The Phoenix Primary School & Nursery, Northlands Primary School & Nursery and Ryedene Primary & Nursery School. Lee Chapel Nursery joined the trust on 1st September 2016. On 1st September 2018, Greensted Infant School joined the trust. From 1st September 2023 Greensted Junior and Greensted Infant are now known as Greensted Primary School. Chapel Hill Primary School and Nursery was built in 2024 and joined on 30th August 2024.

Engagement with employees (including disabled persons)

The welfare of our staff is fundamental to our business and to ensuring the provision of an 'Outstanding' education for our pupils. The Health and safety of all employees is important to us and we encourage and empower them to take ownership and to report and raise any issues they encounter in this respect.

The Trust Board agree common policies and practices and these are applied across all schools. The head teachers / heads of school have regular meetings with the CEO and these are communicated to the staff in the schools' weekly staff meeting and the minutes are circulated to all employees following these meetings. Risk Assessments are regularly carried out covering all aspects of the school's premises, staff and pupils to ensure a safe working environment.

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The staff are represented at the local governing body meetings and they may raise any issues brought to their attention by other staff and provide feedback. The financial position of the school is discussed and staff are regularly made aware of their individual responsibility in ensuring the stability of the finances at the school and ultimately the Trust.

The Trust policy is to treat disabled people on the same basis as all staff in relation to employment, career development and training. Staff involvement in meeting the company's aims is encouraged at all levels.

The Trust is committed to a policy of equal opportunities for all staff.

Engagement with suppliers, customers and others in a business relationship with the academy trust

The Trust has continued to use its existing suppliers and continues to operate on Best for Value deals and this has been used to extend fixed contracts for up to 5 years. The trust has negotiated new centralised contract for HR & Payroll to ensure it receives best value for money and all current contracts within the schools have been centralised where possible to ensure that all future reviews are completed at the same time.

Objectives and Activities

The Multi Academy Trust's object is to advance for the public benefit education in the United Kingdom, in particular but without prejudice to the generality of the foregoing by establishing, maintaining, carrying on, managing and developing schools ("the Academies") offering a broad and balanced curriculum.

The principal aim of the Multi Academy Trust is to provide high quality provision and outcomes and thus improves the life chances of all the pupils across the Trust. All pupils, regardless of their starting points, are expected to make outstanding progress and this is achieved through exceptional academic and extra-curricular opportunities and robust tracking and interventions.

Further aims are:

- To provide a stunning and inspirational learning environment that enables children to learn and teachers to teach effectively
- To identify those children requiring additional support to accelerate their progress and raise their attainment
- To identify high achieving children and effectively support them to achieve their potential
- To provide equal opportunities for all to achieve

The Multi Academy Trust focused on the following objectives:

Lee Chapel Primary School

Curriculum and Learning

- Continue to deliver an exceptional, inclusive curriculum that meets the needs of all learners, including those with SEND.
- Provide a curriculum of depth and richness that inspires learners and enables them to acquire, build, and apply knowledge and skills across subjects.
- Implement ambitious, well-structured "Keep-up" and "Catch-up" programmes to close gaps in knowledge, raise attainment, and accelerate progress.

Leadership and Staff Development

- Strengthen leadership at every level, ensuring all staff are accountable for provision and progress within their areas of responsibility and across their phase and Year Group.
- Empower leaders and governors to focus on improving provision and outcomes for disadvantaged pupils so their life chances equal those of their peers.

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- Extend ITT provision annually to increase the number of trainee teachers working across the school.
- Support staff well-being to sustain a positive, high-performing culture.

Teaching and Achievement

- Ensure teaching across all year groups is consistently at least “Good” and aspires to be “Outstanding.”
- Maintain high academic performance that compares favourably with local and national data and shows continued improvement.
- Embed reading-progression matrices to accelerate pupils’ reading development and vocabulary acquisition.

Pupil Support and Enrichment

- Increase pastoral support for vulnerable families through trained counsellors and therapists.
- Improve overall attendance, with a particular focus on disadvantaged pupils and those in the lowest 20%.
- Enhance provision and outcomes for Nursery pupils.
- Provide a wide range of extra-curricular activities to help every pupil achieve their potential and prepare successfully for secondary education.
- Promote the well-being of all pupils.

Continuous Improvement

Implement the school’s development plan to secure ongoing improvements in all aspects of school life.

- Maintain the school’s “Outstanding” Ofsted judgement (November 2023) through continuous self-review, action and the relentless pursuit of outstanding provision and high standards.

Greensted Primary School

- Celebrate Personal Development at Greensted –launching a learning Quest for children to achieve during their Primary years starting in September 2024
- Invest in new hardware for the school (iPad/tablets, Interactive whiteboards) 16 per year
- Embed technology into the curriculum using AR to enhance learning in the class room
- Embed the new phonics scheme (Essential Letters and Sounds) through continued training of staff and reviewing lessons
- Teachers and staff to identify the lowest 20% and target those children to ‘keep up not catch up’
- Provide additional booster sessions in Year 6 to raise the attainment in Year 6 in preparation for Year 7
- Attendance: continue to drive up attendance – embed the celebration of attendance during weekly assemblies, embed the 100% party every half-term and continue to proactively contact parents when they fall below 95%
- Develop the SEN provision planning specific sessions to target key learning goals as detailed in their EHCPs

The Phoenix Primary School & Nursery

- To continue to strengthen leadership at all levels across the school, ensuring that all are accountable and responsible for the standards and achievement in their subjects. Supporting new leaders in leading their subjects.
- Leaders and governors focus on consistently improving outcomes for disadvantaged pupils and the lowest 20%.
- Ensure that teaching over time in all Year Groups is outstanding and never less than consistently good.

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- To improve the attendance overall by all groups, especially the disadvantaged, the lowest 20% and those from white British backgrounds.
- To deliver an ambitious curriculum for all learners, including those with SEND.
- To implement a curriculum that has depth and richness which engages learners and enables them to acquire skills and knowledge that they are able to systematically build on and apply across other subjects.
- To continue to promote the well-being of staff and pupils.
- Review staffing structure and deployment of teaching and non-teaching staff in the light of budgetary pressures.
- To improve the personal development, offer across the school
- To refine the structure of teachers to ensure each 4th set is teacher led

Ryedene Primary & Nursery School

- To continue to develop oracy and language development across the school
- To improve the outcomes for writing in all year groups, especially for boys and disadvantaged pupils
- To ensure phonics is effectively taught and children achieving the expected standard in screening checks increases.
- To ensure the curriculum is planned to consist of sequences of learning that meet the needs of the most able in all subjects of the curriculum.
- To 'narrow the gap' between PPG and non-PPG children in terms of their end of year / key stage outcomes.
- To ensure any changes to the curriculum are implemented and embedded effectively across the school.
- To introduce and embed new spelling scheme
- To consistently adhere to the school's behaviour for learning policy.
- To ensure the school's values are recognised and referred to by staff and learners
- To continue to refer to and promote the 'Ryedene 30' personal development 'passport'
- To prepare pupils for the future in terms of academia, wellbeing and confidence.
- To ensure inclusive classrooms are created across the school.
- To maintain the very highest pupil performance standards across the school, with pupils continuing to achieve at or above the national standards.
- To maintain a professional dialogue with parents and carers to continue the positive working partnership which has been fostered.
- To be judged as 'exceptional' in the EYFS.
- For the school to be judged 'exceptional' in all areas

Northlands Primary School & Nursery

- To increase the number of children achieving the greater depth level in reading writing and maths.
- For teachers and subject leaders to have greater clarity over the key knowledge and skills children need.
- For subject Leaders to have greater awareness of how the early years curriculum sequences into their subjects.
- To improve attendance rates for pupil groups.
- To share the school's personal development opportunities with the school's community
- To enable the school's ELT to have greater opportunities to lead strategic improvements.
- To further develop ways to close the language barrier between children in early years.

Chapel Hill Primary School & Nursery

- The Trustees remain committed to embedding the *Chapel Hill Standards* as the foundation for excellence across our newly established school and nursery. These standards continue to guide our approach to teaching, learning, leadership, and community engagement. Over the past year, significant progress has been

Lee Chapel Multi Academy Trust Governance Report For the year ended 31 August 2025

made in aligning practice and culture with these expectations, ensuring that every pupil benefits from consistently high-quality provision.

- As the school and nursery grow, our focus remains firmly on raising standards of attainment and accelerating progress for all learners. Trustees are actively monitoring the implementation of improvement strategies, supporting staff professional development, and ensuring that robust systems for assessment and evaluation are in place. Through these efforts, we aim to secure sustained excellence and deliver the Chapel Hill vision of an inclusive, aspirational, and high-achieving educational environment.

Public benefit

The Multi Academy Trust receives the majority of its income from the Department for Education to provide educational services to children and to ensure that they have a broad & balanced curriculum. The Trustees are satisfied that they meet the public benefit criteria.

The trustees confirm that they have complied with the duty of the Charities Act 2011 to have regard to the Charity Commission's general guidance on public benefit, 'Charities and Public Benefit'.

Strategic Report

Achievements and Performance

Lee Chapel Primary School & Nursery

Analysis & Main objectives

Lee Chapel Primary School is an oversubscribed primary school, which has an Outstanding Ofsted rating. The school received 396 applications for the September 2024 Reception intake for 120 places of which 176 were 1st choice. The school has eight open mornings with a total of 16 sessions, which it holds in the autumn term for prospective new parents.



Lee Chapel Primary School Pupil Outcomes 2025



Early Years Foundation Stage	% achieving GLD	% achieving EXP+EXC Reading	% achieving EXP+EXC Writing	% achieving EXP+EXC Number	% achieving EXP+EXC Num Pat	% achieving EXP+EXC Self reg	% achieving EXP+EXC Man Self	% achieving EXP+EXC Rel
All Pupils (119)	80%	82%	82%	82%	83%	86%	87%	90%
Pupil Premium (22)	73%	64%	64%	64%	68%	68%	82%	82%
Non-Pupil Premium (98)	81%	86%	86%	87%	87%	87%	89%	92%
Boys (65)	79%	82%	82%	82%	82%	83%	83%	86%
Girls (54)	82%	83%	81%	83%	85%	89%	93%	94%

Year 1 Phonics	% achieving national expectations	Yr 2 Phonics re-sits	% achieving National expectations
All Pupils (103/119)	87%	Year 2 (15)	47% (7 children)
Pupil Premium (11/15)	73%	Pupil Premium (5)	20% (1 child)
Non-Pupil Premium (92/104)	89%	Non-Pupil Premium (10)	60% (6 children)

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End of Key Stage 1

	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (123)	93	76%	43	35%
Pupil Premium (18)	10	55%	1	6%
Non-Pupil Premium (105)	83	79%	42	40%
Writing				
All pupils (123)	92	75%	30	24%
Pupil Premium (18)	9	50%	0	0%
Non-Pupil Premium (105)	83	79%	30	29%
Mathematics				
All pupils (123)	94	76%	48	39%
Pupil Premium (18)	9	50%	0	0%
Non-Pupil Premium (105)	85	81%	48	46%
Combined Results (Reading, Writing and Maths)				
All pupils (123)	83	67%	29	24%
Pupil Premium (18)	5	28%	0	0%
Non-Pupil Premium (105)	78	74%	29	28%

End of Key Stage 2

	No. of pupils meeting age related expectations	Lee Chapel % of pupils meeting age related expectations	No. of pupils exceeding age related expectations (Test Scaled Score ≥ 110)	% of pupils exceeding age related expectations (Test Scaled Score ≥ 110)
Reading				
All pupils (132)	118	89%	82	62%
Pupil Premium (31)	24	77%	14	45%
Non-Pupil Premium (101)	94	93%	68	67%
Writing (Teacher Assessment)				
All pupils (132)	121	92%	94	72%
Pupil Premium (31)	29	94%	15	48%
Non-Pupil Premium (101)	95	95%	79	79%
Grammar, Punctuation and Spelling				
All pupils (132)	118	83%	62	51%
Pupil Premium (31)	20	65%	5	16%
Non-Pupil Premium (101)	89	88%	62	61%
Mathematics				

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All pupils (132)	120	91%	74	56%
Pupil Premium (31)	24	77%	9	29%
Non-Pupil Premium (101)	96	95%	62	64%
Combined Results (Reading, Writing and Maths)				
All pupils (132)	112	85%	61	46%
Pupil Premium (31)	21	68%	7	23%
Non-Pupil Premium (101)	91	90%	54	53%

Attendance

Whole School Attendance 2024/25 was 96.2%.
 FSM/Pupil Premium Attendance 2024/25 was 91.04



Greensted Primary School & Nursery
 Excellence for All

Analysis & Main objectives

Greensted Primary School and Nursery recently amalgamated in September 2022, joining the Infant school and Junior school. We are a 2-form entry school with 503 children on roll in our primary school and a further additional 72 children on roll in our newly built 2-form nursery. The school had 181 applications for 60 Reception places for a September 2024 start. In October 2024 the school had its first OFSTED inspection since its amalgamation. The school received a positive report noting that Greensted is a “happy and friendly school”. The school was judged as Outstanding in Behaviour and Attitudes, Personal Development, Early Years Provision and Good in Quality of Education and Leadership and Management.

Greensted End of Year Data 2024/2025

Early Years Foundation Stage	% achieving GLD	% achieving EXP Word Reading	% achieving EXP Writing	% achieving EXP Number	% achieving EXP Numerical Patterns	% achieving EXP Self-Regulation	% achieving EXP Managing Self	% achieving EXP Building Relationships
All Pupils (60)	75%	75%	75%	85%	82%	87%	97%	90%
Pupil Premium (20)	60%	60%	60%	75%	70%	75%	95%	80%
Non-Pupil Premium (40)	83%	83%	83%	90%	88%	93%	98%	95%
Boys (27)	67%	67%	67%	81%	78%	85%	96%	89%
Girls (33)	82%	82%	82%	88%	85%	88%	97%	91%

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Year 1 Phonics	% achieving national expectations	Yr 2 Phonics re-sits	Year 2 % achieving National expectations
All Pupils (52/61)	85%	Year 2 (6/10)	60%
Pupil Premium (13/20)	65%	Pupil Premium (4/5)	80%
Non-Pupil Premium (39/41)	95%	Non-Pupil Premium (2/5)	40%

End of Key Stage 1

	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (60)	45	75%	17	28%
Pupil Premium (19)	12	63%	5	26%
Non-Pupil Premium (41)	33	80%	12	29%
Writing				
All pupils (60)	37%	62%	12	20%
Pupil Premium (19)	9	48%	2	11%
Non-Pupil Premium (41)	28	68%	11	24%
Maths				
All pupils (60)	42	70%	12	20%
Pupil Premium (19)	10	52%	1	5%
Non-Pupil Premium (41)	32	78%	11	27%
Combined Results (Reading, Writing and Maths)				
All pupils (60)	40	67%	6	10%
Pupil Premium (19)	9	47%	1	5%
Non-Pupil Premium (41)	31	75%	5	12%

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End of Key Stage 2

	No. of pupils meeting age-related expectations	% of pupils meeting age-related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (60)	48	80%	21	35%
Pupil Premium (28)	20	71%	6	21%
Non-Pupil Premium (32)	28	87%	15	47%
Writing				
All pupils (60)	55	92%	17	28%
Pupil Premium (28)	24	86%	4	14%
Non-Pupil Premium (32)	31	97%	13	41%
Maths				
All pupils (60)	49	82%	11	18%
Pupil Premium (28)	20	71%	2	7%
Non-Pupil Premium (32)	29	97%	13	41%
Combined Results (Reading, Writing and Maths)				
All pupils (60)	43	72%	7	12%
Pupil Premium (28)	15	54%	0	0%
Non-Pupil Premium (32)	28	88%	7	22%

Attendance

Whole School Attendance 2024/ 2025: 94.71%

Whole School Attendance: FSM / Pupil Premium Attendance 2024/2025: 92%

Phoenix Primary School & Nursery

The Phoenix Primary School & Nursery is a popular, three-form entry primary school with a 75-place nursery. We currently 709 children on role (629 in the primary and 80 within nursery). 29% of the children on role are in receipt of PPG and for 16% of children English is not considered to be their first language and 43% are from minority ethnic backgrounds. The school is noted to have a high number of children with EHCPs.

The Head of School was new to post in April 2024. The school had a Section 8 OFSTED inspection in April 2024 and a full inspection in June 2025. This positive report recognised the strong direction and understanding leaders had, the strength of early reading, positive changes made to improve personal development, our support of SEND pupils and positive behaviour across the school. Leaders and Governors are united in their understanding of what

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the school needs to do to improve further. The school was graded as outstanding for Leadership and Management and Behaviour and Attitude, with the grading being good in all other areas.

The school recently underwent extension works that included a new ICT suite (to develop curriculum offer) and a staff room (to support staff well-being. Play equipment installation is currently underway and this is the first phase of ongoing improvements needed for the outdoor environment.



Phoenix Primary School & Nursery Data -

July 2025

Early Years Foundation Stage

EYFS (90)	69% GLD
Pupil Premium (17)	47% GLD
Non-Pupil Premium (73)	73% GLD

Key Stage 1

Year 1 Phonics	% achieving national expectations	Yr 2 Phonics re-sits	% achieving National expectations
All Pupils (90)	78%	Year 2 (27)	81% (22/27 children)
Pupil Premium (26)	62%	Pupil Premium (13)	77% (10/13 children)
Non-Pupil Premium (64)	84%	Non-Pupil Premium (14)	86% (12/14 children)

	No. of pupils meeting age related expectations	% of pupils meet age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (88)	57	65%	7	7%
Pupil Premium (21)	10	48%	2	10%
Non-Pupil Premium (67)	47	70%	5	7%
Writing				
All pupils (88)	62	71%	6	7%
Pupil Premium (21)	11	52%	2	10%
Non-Pupil Premium (67)	51	76%	4	6%
Maths				
All pupils (88)	63	72%	9	10%
Pupil Premium (21)	14	67%	2	10%
Non-Pupil Premium (67)	49	73%	7	10%
Combined Results (Reading, Writing and Maths)				
All pupils (88)	56	63%	7	7%
Pupil Premium (21)	9	43%	2	10%
Non-Pupil Premium (67)	47	70%	5	7%

Key Stage 2

	No. of pupils meeting age-related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (89)	61	69%	30	34%
Pupil Premium (30)	17	57%	3	10%
Non-Pupil Premium (59)	44	74%	25	42%
Writing				
All pupils (89)	61	69%	28	31%
Pupil Premium (30)	16	53%	3	10%
Non-Pupil Premium (59)	45	76%	25	42%

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Maths				
All pupils (89)	56	63%	17	19%
Pupil Premium (30)	13	43%	3	10%
Non-Pupil Premium (59)	43	73%	14	24%
Combined Results (Reading, Writing and Maths)				
All pupils (89)	56	53%	17	11%
Pupil Premium (30)	9	27%	1	3
Non -Pupil Premium (59)	47	64%	9	15%
Spelling, Punctuation and Grammar				
All pupils (89)	60	67%	31	35%
Pupil Premium (30)	14	47%	5	17%
Non-Pupil Premium (59)	46	78%	26	44%

Attendance

Whole School Attendance 2024/ 2025: 95.8%

Whole School Attendance: FSM / Pupil Premium Attendance 2024/2025: 93.3%

Analysis and Main Aims

Deployment of staffing to accelerate progress of learners in key year groups

- Tuition in place from Autumn Term for Key Pupils – targeting PPG
- Key “sticky” knowledge and vocabulary to be mapped and tracked for all subjects
- CPD that focuses on evidence-based teaching strategies
- Further attendance support to focus on “hard to reach” persistent absentees
- Further development of the personal development offers to include: STEM and further PPG opportunities

Ryedene Primary & Nursery School

Ryedene Primary and Nursery School was graded as ‘Good’ by Ofsted in June 2019 in all Ofsted categories. This was continued during an ungraded inspection in March 2025 when ‘good’ was maintained but with a view to being outstanding in the next graded inspection.

Continued improvements in the quality of teaching have been supported by the Head and the school’s Senior Leadership Team. School leaders continue to scrutinise and act upon outcomes for disadvantaged pupils. Robust and timely interventions are planned for in the school timetable for those children who need support. Other teaching tools are used such as ‘split starts’ and ‘pre teaching’ to help children keep up with their peers across the curriculum. High expectations are demonstrated for all children so they are fully prepared for life after primary school. The school is growing and we have many ambitions for the future: to be rated ‘outstanding’, to improve the school environment and to recruit and retain high quality teaching and support staff.

Analysis & Main objectives

Governors continue to regularly monitor the work of the school, as outlined in the School Improvement Plan. During 2024/25 governor monitoring has focussed on ensuring a broad and balanced curriculum as well as ensuring high expectations for all pupils regardless of their level of need. Governors have also focused on ensuring our SEND offer is suitable for the needs of our children.

Pupil Outcomes 2025 Early Years Foundation Stage	% achieving GLD	% achieving EXP Reading	% achieving EXP Writing	% achieving EXP Number	% achieving EXP Comm & Lang	% achieving EXP Phys Dev	% achieving EXP PSED
All Pupils (45)	82%	82%	82%	82%	82%	82%	82%
Pupil Premium (15)	67%	67%	67%	67%	67%	67%	67%

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Non-Pupil Premium (30)	90%	90%	90%	90%	90%	90%	90%
Boys (22)	73%	73%	73%	73%	73%	73%	73%
Girls (23)	91%	91%	91%	91%	91%	91%	91%

Year 1 Phonics	% achieving national expectations	Year 2 Phonics following resits	% achieving national expectations
All Pupils (57)	74%	All Pupils (60)	78%
Pupil Premium (20)	45%	Pupil Premium (28)	68%
Non-Pupil Premium (37)	89%	Non-Pupil Premium (32)	88%

End of Key Stage 1

	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (60)	39	65%	13	22%
Pupil Premium (28)	15	54%	2	7%
Non-Pupil Premium (32)	24	75%	11	34%
Writing				
All pupils (60)	39	65%	9	15%
Pupil Premium (28)	15	54%	1	4%
Non-Pupil Premium (32)	24	75%	8	25%
Maths				
All pupils (60)	40	67%	10	17%
Pupil Premium (28)	12	43%	4	14%
Non-Pupil Premium (32)	28	88%	6	19%
Combined Results (Reading, Writing and Maths)				
All pupils (60)	36	60%	7	12%
Pupil Premium (28)	12	43%	1	4%
Non-Pupil Premium (32)	24	75%	6	19%

End of Key Stage 2

	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	% pupils achieving 'at least expected' Essex	% pupils achieving 'at least expected' England	No. of pupils exceeding age related expectations (Test Scaled Score ≥ 110)	% of pupils exceeding age related expectations (Test Scaled Score ≥ 110)
Reading						
All pupils (34)	26	76%		75%	13	38%
Pupil Premium (16)	9	56%			2	13%
Non-Pupil Premium (18)	17	94%			11	61%
Writing (Teacher Assessment)						
All pupils (34)	28	82%		72%	7	21%
Pupil Premium (16)	11	69%			3	19%
Non-Pupil Premium (18)	17	94%			4	22%
Maths						

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All pupils (34)	28	82%		74%	10	29%
Pupil Premium (16)	11	69%			3	19%
Non-Pupil Premium (18)	17	94%			7	39%
Combined Results (Reading, Writing and Maths)						
All pupils (34)	26	76%		62%	6	18%
Pupil Premium (16)	9	56%			2	13%
Non-Pupil Premium (18)	17	94%			4	22%
Grammar, Punctuation & Spelling						
All pupils (34)	27	79%		73%	8	24%
Pupil Premium (16)	10	63%			2	13%
Non-Pupil Premium (18)	17	94%			6	33%

Attendance

Attendance 2024/25 = 93.6%

FSM/Pupil Premium Attendance = 91.2%

Northlands Primary School and Nursery

Analysis & Main objectives

Northlands Primary School & Nursery is a 3-form entry school located in Pitsea Basildon. There are 728 children on roll including nursery with 44% of the children meeting the PPG criteria. Following the School's very positive Ofsted report and pupil outcomes in July 2024, this academic year has been an opportunity to consolidate the rapid school improvement measures that were put in place. The school's continued improvements have seen further developments across the curriculum. There remains a strong focus on developing pupils' personal development due to the high levels of deprivation that is seen within the school community.

2024-2025 Pupil Outcomes

Early Years Foundation Stage	% achieving GLD	% achieving EXP Reading	% achieving EXP Writing	% achieving EXP Number	% achieving EXP Num Pat	% achieving EXP Self reg	% achieving EXP Man Self	% achieving EXP Rel
All Pupils (90)	71%	74%	72%	73%	73%	76%	76%	78%
Pupil Premium (27)	49%	56%	52%	48%	48%	56%	56%	63%
Non-Pupil Premium (63)	81%	83%	81%	81%	81%	84%	84%	84%
Boys (46)	63%	70%	65%	64%	64%	67%	67%	72%
Girls (44)	80%	80%	80%	81%	81%	84%	84%	84%

Year 1 Phonics	% achieving national expectations	Year 2 Phonics Resits	% achieving national expectations
All Pupils (89)	75%	All Pupils (10/20)	50% (89% overall)
Pupil Premium (29)	59%	Pupil Premium (14)	50%
Non-Pupil Premium (60)	81%	Non-Pupil Premium (6)	33%

End of Key Stage 1

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	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
Pupils (90)	59	65%	12	13%
Pupil Premium (29)	15	51%	3	10%
Non-Pupil Premium (61)	44	72%	9	14%
Writing				
All pupils (90)	63	70%	14	16%
Pupil Premium (29)	17	59%	4	14%
Non-Pupil Premium (61)	46	75%	10	16%
Maths				
All pupils (90)	61	68%	14	15%
Pupil Premium (29)	15	51%	4	14%
Non-Pupil Premium (61)	46	75%	10	16%
Combined Results (Reading, Writing and Maths)				
All Pupils (90)	55	61%	10	11%
Pupil Premium (29)	14	48%	3	10%
Non-Pupil Premium (61)	41	67%	7	12%

End of Key Stage 2

	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (90)	66	73%	20	22%
Pupil Premium (47)	33	70%	10	21%
Non-Pupil Premium (43)	33	77%	10	23%
Writing (Teacher Assessment)				
All pupils (90)	72	80%	12	13%
Pupil Premium (47)	37	79%	5	11%
Non-Pupil Premium (43)	35	81%	7	16%
Maths				
All pupils (90)	67	74%	16	17%
Pupil Premium (47)	32	68%	6	13%
Non-Pupil Premium (43)	35	81%	10	23%
Combined Results (Reading, Writing and Maths)				
All Pupils (90)	58	64%	4	4%
Pupil Premium (47)	25	53%	1	2%
Non-Pupil Premium (43)	33	77%	3	7%

Analysis & Main objectives

The following measures have been put in place in order to help us achieve further school improvements next year:

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- A whole phase focus on multiplication learning in preparation for the MTC in year 4
- In English and Maths sets will be linear (1,2,3,4) rather than parallel. Teachers will plan for their individual sets allowing for a closer match between challenge and pupil ability.
- Updated and enhanced English and Maths interventions across the school.
- Across the curriculum the key knowledge that children need to progress will be further formalised and recorded.
- Earlier identification and support for pupils whose attendance drops.
- Identify and integrate opportunities for pupils to develop their oracy
- Establish clear responsibilities and roles for the school's phase leads tailored professional development to be given to meet these responsibilities.
- Conduct an audit of current continuous provision activities to identify strengths and areas for development – create a resource bank of CP activities alongside staff training.

Attendance

Attendance 2024/2025 = 95.5%

FSM/Pupil Premium Attendance 2024/2025 = 92.6%

Chapel Hill Primary School and Nursery

Analysis & Main objectives

Chapel Hill Primary school received 179 applications for the September 2024 Reception intake for 30 places of which 64 were 1st choice. The school will be holding open mornings in the autumn term for prospective new parents.



**Chapel Hill Primary School and Nursery
Pupil Outcomes 2025**



Early Years Foundation Stage	% achieving GLD	% achieving EXP+EXC Reading	% achieving EXP+EXC Writing	% achieving EXP+EXC Number	% achieving EXP+EXC Num Pat	% achieving EXP+EXC Self reg	% achieving EXP+EXC Man Self	% achieving EXP+EXC Rel
All Pupils (31)	77%	87%	77%	81%	94%	90%	94%	94%
Pupil Premium (5)	20%	60%	20%	20%	60%	60%	80%	80%
Non-Pupil Premium (26)	88%	92%	88%	92%	100%	96%	96%	96%
Boys (15)	73%	80%	73%	80%	93%	80%	87%	87%
Girls (16)	81%	94%	81%	81%	94%	100%	100%	100%

Year 1 Phonics	% achieving national expectations	Yr 2 Phonics re-sits	% achieving National expectations
All Pupils (11/17)	65%	Year 2 (9)	33 (3 children)
Pupil Premium (0/2)	0%	Pupil Premium (3)	0% (0 children)
Non-Pupil Premium (11/15)	73%	Non-Pupil Premium (6)	43% (children)

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End of Key Stage 1				
	No. of pupils meeting age related expectations	% of pupils meeting age related expectations	No. of pupils exceeding age related expectations	% of pupils exceeding age related expectations
Reading				
All pupils (16)	9	56%	43	35%
Pupil Premium (3)	1	33%	0	0%
Non-Pupil Premium (13)	8	62%	4	31%
Writing				
All pupils (16)	7	44%	30	24%
Pupil Premium (3)	0	0%	0	0%
Non-Pupil Premium (13)	7	54%	1	8%
Mathematics				
All pupils (16)	8	50%	48	39%
Pupil Premium (3)	1	33%	0	0%
Non-Pupil Premium (13)	7	54%	2	23%
Combined Results (Reading, Writing and Maths)				
All pupils (16)	6	38%	1	6%
Pupil Premium (3)	0	0%	0	0%
Non-Pupil Premium (13)	6	46%	1	8%

Going Concern

After making appropriate enquiries, the board of trustees considers these effects to be manageable and therefore has a reasonable expectation that the academy trust has adequate resources to continue in operational existence for the foreseeable future. For this reason, it continues to adopt the going concern basis in preparing the financial statements. Further details regarding the adoption of the going concern basis can be found in the Statement of Accounting Policies.

Promoting the success of the company

The trust as a charity maintains its status within the community by promoting its academies and its achievements i.e., OFSTED ratings to ensure that the high standards in achievements are maintained. The pupils are rewarded when outstanding achievements are made. The Trust builds on its relationships with other Businesses including local ones and has tried to centralise contracts where possible to ensure it has some continuity for all its academies, which will continue.

Financial Review

The Trust has made it a priority to ensure high standards are maintained in the children's attainments and the environment they are taught in but at the same time as ensuring this is within the budget and any proposals for additional expenditure is rigorously evaluated especially in view of the current climate of uncertainty about future funding.

During this period most of the Trust's income is from the Department of Education (DFE) in the form of various grants. Some additional grants (Early Years, SEN and growth funding for schools expanding) have been received from the Local Authority. The grants and the associated expenditure are shown as restricted funds in the Statement of Financial Activities (SOFA). The Trust received School Condition Allocation (SCA) which was targeted towards Phoenix Primary School for the creation of a staff room and computing suite, Ryedene Primary School playground levelling due to health and safety issues and Northlands Primary School electrical wiring works and installation of single panel alarm system.

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The Trust also received grants from the Local Authority for fixed assets (building project at Chapel Hill Primary School). This grant is shown in the Statement of Financial Activities (SOFA) as restricted income in the fixed asset fund. This fund is reduced annually by the depreciation charges over the expected useful life of the assets concerned.

The Trust raises and receives funds from the children to pay for a wide variety of activities and these have been applied against the associated costs and these are shown in the Statement of Financial Activities (SOFA) as unrestricted funds.

The Trust in year surplus was £1,256,000 (2024: £15,647,000 this includes a gain on the defined benefit pensions liability of £Nil (2024: £nil).

The Local Government Pension Scheme, which is provided to support staff, is a restricted fund and the projected deficits are included within the fund, which reduces the reserves shown in the total funds of the Trust.

The Governors have appointed Juniper Educations Services Ltd to complete a programme of internal checks on internal controls and reports have been provided to the chairperson and the head teacher.

Reserves Policy

The Trust aims to carry forward some resources from the (restricted fund) to cover the medium and long-term needs for renewal and replacement of major capital items and unforeseen contingencies. At the year end the trust held general restricted funds of £990,000 (2024: £399,000) and general unrestricted funds of £4,159,000 (2024 £3,283,000).

The unrestricted fund represents funds received for educational activities, breakfast club, tuck, nursery and teatime club and their related expenses, which are not included within the restricted reserves within SORP.

The Local Government Pension Scheme is included within restricted funds however, it should be noted that the academy has to recognise a significant pension fund deficit. This does not impose an immediate liability and if it had surplus funds, then this would still be included within the restricted fund but it would not be an asset which could be realised and subsequently funds expended.

Investment Policy

The trustees of the trust are firmly committed to ensuring that all funds under their control are administered in such a way as to maximise return while minimising risk. Trustees do not consider the investment of surplus funds as a primary activity, but rather a requirement for the effective management of the various funds. Surplus funds are therefore invested in short-term bank deposits where appropriate.

Local Governors' management of cash flow should ensure that there are always sufficient funds in the main bank account to cover operational costs. Banks must be selected from the FSA Approved List included in the Financial Services Compensation Scheme (FSCS).

Local Governors will seek to ensure that any cash not required for operating expenses is placed on deposit at the most favourable rate. If longer-term arrangements were required then alternative investment opportunities would be sought, e.g., Treasury Bonds, long term deposits. However, the providers would be selected from the FCA Approved List included in the Financial Services Compensation Scheme (FSCS).

Financial and Risk Management Objectives and Policies

The main financial risk to the academy trust is the cash flows. The governing bodies monitor cash flow to ensure that the academy has sufficient funds available to meet its debts as they fall due. The Governors have assessed the credit risk but as the academy's main income is from the DFE and Essex County Council they feel that this is not an issue as funds are received when due. The Trust Finance and audit committee receive the individual schools' reports (Cashflow, Trial Balance and Balance sheet) and consolidated reports.

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Principal Risks and Uncertainties

Trustees and Governors have identified the following areas affecting the academy risk and uncertainties at the Academy.

Financial Risk

The academy continues to operate in a period of uncertainty with regard to public funding. The number of pupils in the individual academy drives the funding and the schools proactively organise open events for prospective parents. The school development plans are followed closely to ensure that a continuing maintenance of the sites are maintained and that staffing is sustainable. The trust is proactively reviewing the ongoing staffing structure within the trust to reduce costs in order to eliminate any future deficit forecasts.

Local Government Pension Scheme

The Academy participates in the Local Government Pension Scheme. At 31 August 2025, the deficit on that scheme was £5,727,000. The deficit on the pension scheme was inherited from Essex County Council. From 1st April 2017, the Pension fund increased the monthly contribution rate paid based on employees' monthly salaries to include the pension deficit. The Trust agreed in June 2022 to move to one Local Government Scheme when the payroll moved from 5 PAYE to 1 PAYE payroll.

Failure in Governance/management

Trustees and governors continue to review and ensure that measures are in place to mitigate this risk.

Reputational Risk

The continuing success of the academy trust depends on maintaining high educational standards in order to attract sufficient numbers of outstanding teacher's pupils to the school. Trustees and governors are focused on monitoring and reviewing the achievement and success of the children.

Safeguarding and Child Protection risks

Trustees and governors continue to ensure that high standards are maintained in selecting staff. The schools have a child protection policy and provide training and support in order to protect the vulnerable young children in its care.

Significant changes in staff

Trustees and Governors have in place a succession planning policy to develop existing staff as well as continue to review and monitor arrangements for any new staff which may be required.

"We are an equal opportunity organisation and are committed to a working environment that is free from any form of discrimination on the grounds of colour, race, ethnicity, religion, sex, sexual orientation or disability. We will make reasonable adjustments to meet the needs of staff or pupils who are or become disabled".

Risk Management

The trustees and governors are responsible for the management of risks to which the academy trust is exposed and have completed a review of risks associated with its activities. The key controls used within the trust are:

- Formal Agendas for all meetings
- Terms of Reference for the committees
- Development Plan which identifies key strategic planning objectives and the resources required to achieve them
- Budget planning, monitoring and reviews strategy group
- Financial authorisation and approval levels
- Written policies reviewed regularly
- Clear Safeguarding and vetting procedures as required by law to protect the pupils

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- Continuous review of educational achievements to ensure high standards can be achieved
- Succession Planning
- The individual academy expansion will only be considered if the funding is not lagged

The trustees and governors have reviewed the major risks, focusing on operational, financial, governance, compliance and reputational risk, and are satisfied those steps have been taken to mitigate the risks. The trustees and governors recognise that systems can only provide reasonable assurance that major risks are adequately managed.

The trustees have appointed Juniper Educational Services Ltd to complete a review of the Internal Scrutiny Controls in accordance with the Academies Financial Handbook of all schools and the Trust and provide assurance to the Trustees and Governors on IT Security (Cyber) and GDPR by performing a range of checks on the Academy's IT Systems and GDPR Processes. The reports highlighted some actions and action plans have been put in place.

There is no credit risk as the amounts generally owed to the academy are due from the local authority.

Fundraising

The academy trust does not use any external fundraisers. No complaints were received during the year in relation to fundraising practices.

Streamlined Energy and Carbon Reporting

The trust is a large company, as determined by sections 465 and 466 of the Companies Act 2006 and consumes more than 40,000 KWh of energy (in the UK) in a reporting period accordingly it includes within the trustees' report: its UK energy use and associated greenhouse gas emissions, as a minimum relating to gas, purchased electricity and transport fuel in the period

- its energy use and emissions
- an emissions intensity ratio
- methodologies used in the calculations
- measures taken to improve energy efficiency in the period.

UK Greenhouse gas emissions and energy use data for the period	1 st September 2024 to 31 st August 2025	1 st September 2023 to 31 st August 2024
Energy consumption used to calculate emissions (kWh)	2,133,648	1,981,970
Energy consumption break down (kWh) (optional) <ul style="list-style-type: none"> • gas, • electricity, • transport fuel 		
Scope 1 emissions in metric tonnes CO ₂ e Gas consumption Owned transport – mini-buses Total scope 1	386,232	380,970
Scope 2 emissions in metric tonnes CO ₂ e Purchased electricity		
Scope 3 emissions in metric tonnes CO ₂ e Business travel in employee-owned vehicles	0	0

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Total gross emissions in metric tonnes CO2e	38.60	38.10
Intensity ratio Tonnes CO2e per pupil	0.11	0.11
<p>Quantification and Reporting Methodology: -</p> <ul style="list-style-type: none"> We have followed the 2019 HM Government Environmental Reporting Guidelines. We have also used the GHG Reporting Protocol – Corporate Standard and have used the 2025 UK Government’s Conversion Factors for Company Reporting. <p>2024 Additional school added.</p> <p>Intensity measurement - The chosen intensity measurement ratio is total gross emissions in metric tonnes CO2e per pupil, the recommended ratio for the sector.</p> <p>Measures taken to improve energy efficiency – School hours reduced in the evenings to reduce costs and closed during school holidays to staff only maintenance completed.</p>		

Plans for Future Periods

The trust will continue to talent spot and train outstanding teachers to take on key roles across the multi academy trust.

The objectives for the next year of the academy at Lee Chapel Primary School & Nursery are:

- To maintain the school’s November 2023 ‘Outstanding’ OFSTED rating in recognition of the school’s exceptional curricular and extra-curricular provision, standards of pupil outcomes and rates of progress.
- To further improve the school’s provision and outcomes for all pupils and in particular disadvantaged and ‘vulnerable’ pupils
- To further develop the richness and depth of the school’s curriculum and maintain the academic opportunities for all learners to succeed
- To continue to invest in provisions for the SEND pupils through the addition of a purpose build SEND Inclusion hub
- To further improve the library provision for all pupils
- To continue to embed best practice with regards to assessment to learning. (editing, reshaping lessons as a result of assessment, resilience, articulation of targets and learning, Steps to Success, Success Criteria)
- To continue to improve and extend nursery provision and Out of School Hours Learning to meet the needs of our community.
- To ensure that standards across all Classes are consistently high
- To further increase opportunities for the development of reading fluency and vocabulary

The objectives for the next year of the Academy at Greensted Primary School & Nursery are:

- Curriculum – at Greensted our curriculum should bring awe and wonder to our learners. It should be engaging, fun and creative – we will be investing in ways with additional entry and exit points to engage and bring out the very best in the children
- Embed Personal Development at Greensted – using the Quest books – focus on ways to develop the cultural capital for our children and the community
- Continue to Invest in new hardware for the school (iPad/tablets, Interactive whiteboards)

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- Embed technology into the curriculum using AR to enhance learning in the class room – planning for Autumn
- Teaching staff to use AI to reduce workload and further meet the needs of our children
- Teachers and staff to identify the lowest 20% and target those children to ‘keep up not catch up’
- Embed termly pupil progress meetings – exploring data and provisions
- Staff to use data to inform planning to cater for all needs and to plan appropriate interventions
- Develop the SEN provision planning specific afternoons to target key learning goals as detailed in their EHCPs
- Attendance: continue to drive up attendance – embed the celebration of attendance during weekly assemblies, embed the 100% party every half-term and continue to proactively contact parents when they fall below 95% - (adding a party food basket for every class winner)

The objectives for the next year of the Academy at The Phoenix Primary School & Nursery are:

- To ensure all children receive consistently excellent teaching that challenges children of all abilities
- To improve attendance rates for all pupils, in particular those that are disadvantaged.
- To reduce rates of persistent absenteeism for disadvantaged pupils (making school irresistible through exciting curriculum, extra-curricular opportunities and development of play equipment)
- To provide high-quality CPD that impacts positively on teaching and learning - including the strengthening of coaching from our leaders.
- To deliver an exciting curriculum where the core learning, progression and assessment is consistent across all foundation subjects
- To ensure the school’s personal development offer enriches the lives of all pupils, promoting community and enjoyment
- To continue to refine SEND provision for those learners with exceptionally high needs
- To promote well-being of staff, and pupils, ensuring Phoenix is a happy environment to learn and work within
- To develop the computing offer for children through the addition of a computing laboratory.
- Development of EYFS curriculum to ensure children are ready for KS1

The objectives for the next year of the Academy at Northlands Primary School & Nursery are:

- To increase the number of children achieving the greater depth level in reading, writing and maths.
- To increase the number of children achieving full marks and a raise in the schools' average in the year 4 MTC.
- To improve the quality, depth and retention of pupils' knowledge across all subjects.
- To improve attendance rates for all pupil groups.
- To provide pupils with greater opportunities to develop confidence when speaking publicly.
- To upskill and empower the schools’ ELT to distribute leadership demands.
- To formalise and train staff on continuous provision activities to make learning outcomes more deliberate.

The objectives for the next year of the Academy at Ryedene Primary and Nursery School are:

- To design the curriculum to enable teachers to plan well sequenced lessons in all foundation subjects so that pupils make strong progress in these subjects.
- To mentor and coach our middle leaders
- The curriculum equips teachers with the skills and strategies to plan sequences of learning in reading that meet the needs of all pupils, particularly those pupils who find reading difficult.
- The curriculum equips teachers with the skills and strategies to plan sequences of learning that meet the needs of the most able in all subjects of the curriculum and in the early years.
- To improve the outcomes for writing in all year groups, especially for boys and disadvantaged pupils

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- To continue to develop the teaching of Maths
- To ensure that standards across all Classes are consistent
- To continue to develop RSE Education so that all children understand what constitutes healthy relationships and tolerance towards diverse ways of life.
- To continue to implement the school's behaviour policy alongside positive praise and rewards
- To prepare pupils for the future
- To maintain the very highest pupil performance standards across the school, with pupils continuing to achieve at or above the national standards
- To achieve 'outstanding' in EYFS
- To further enhance extra curricula provision so that pupils' experience is as rich and as varied as possible.
- To continue to invest in provision for the SEND and the most able pupils
- The Senior Leadership Team will continue focusing on ensuring every child is provided with a safe, nurturing environment alongside an aspirational ethos of challenge and high expectations for all.
- We have worked extremely hard to 'market' the school in order to increase the number of pupils on roll. This work will continue to ensure we fill our reception places year-on-year
- The staff here are passionate, driven people and we want to continue to harness this energy and enthusiasm to drive up the standards for all children, regardless of backgrounds.

The objectives for the next year of the Academy at Chapel Hill Primary and Nursery School are

Objectives for Year Two: Driving Excellence and Impact

Embed a Culture of High Expectations and Excellence

- Establish consistently high standards for teaching, learning, and behaviour across all year groups.
- Ensure every member of staff embodies the school's vision 'Learning to Succeed' and values, driving ambition and pride throughout the community.

Secure Exceptional Teaching and Learning

- Develop and sustain high-quality teaching through targeted professional development, instructional coaching, and collaborative planning across Lee Chapel and Chapel Hill.
- Embed evidence-based pedagogical approaches that promote deep learning, independence, and critical thinking.
- Use formative assessment and adaptive teaching to ensure all pupils, particularly those with SEND or disadvantaged backgrounds, make sustained and accelerated progress.

Strengthen Curriculum Excellence and Enrichment

- Refine and embed a broad, balanced, and ambitious curriculum that reflects the local community and prepares pupils for life beyond school.
- Further integrate cultural capital and enrichment experiences that inspire curiosity, creativity, and aspiration.

Prioritise Early Reading, Language, and Communication

- Ensure all pupils, including the youngest learners, develop fluency, comprehension, and a love of reading through high-quality phonics and language-rich environments.
- Work closely with families to promote early reading habits and home learning.

Enhance Inclusion, Wellbeing, and Personal Development

- Foster a nurturing, inclusive environment where every child feels safe, valued, and able to succeed.
- Embed a proactive approach to mental health, emotional regulation, and positive relationships.
- Celebrate diversity and promote respect, empathy, and resilience across the school community.

Build Strong Partnerships with Families and the Wider Community

- Strengthen parental engagement through effective communication, workshops, and shared learning events.
- Forge meaningful links with Redrow housing development, local organisations, Secondary Schools, and cultural partners to enrich opportunities for pupils.

Ensure Effective Leadership, Governance, and Sustainability

Lee Chapel Multi Academy Trust

Governance Report

For the year ended 31 August 2025

- Develop distributed leadership and empower middle leaders to drive improvement within their areas of responsibility.
- Maintain robust self-evaluation and improvement planning processes informed by accurate data and stakeholder feedback.
- Manage resources strategically across Lee Chapel and Chapel to ensure financial stability and investment in high-impact priorities for the further development of this newly opened and sponsored school.

Funds held as Custodian Trustee on behalf of others

The Academy does not hold any funds as Custodian Trustee.

Auditor

In so far as the governors are aware:

- There is no relevant audit information of which the charitable company's auditor is unaware; and
- The trustees have taken all steps that they ought to have taken to make them aware of any relevant audit information and to establish that the auditor is aware of that information.

Moore Kingston Smith LLP have indicated their willingness to continue in office and a resolution proposing that they be re-appointed as auditors will be put to the Annual General Meeting.

The trustees' report, incorporating a strategic report, was approved by order of the board of trustees, as the company directors, on 26th November 2025 and signed on the board's behalf by:

Signed



Mr C O'Callaghan

Chair

Scope of Responsibility

As trustees, we acknowledge we have overall responsibility for ensuring that Lee Chapel Multi Academy Trust 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 Head teachers, Head of Schools and the CEO as the 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 Lee Chapel Multi Academy Trust and the Secretary of State for Education. They are also responsible for reporting to the board of trustees any material weaknesses or breakdowns in internal control.

Governance

The information on governance included here supplements that described in the Trustees' Report and in the Statement of Trustees responsibilities. The board of trustees has formally met 6 times during the year. Attendance during the year at meetings of the governing body was as follows:

Lee Chapel Multi Academy Trust
 Governance Report
 For the year ended 31 August 2025

Governance	Meetings attended	Out of a possible
C O'Callaghan (Chairperson)	5	5
M Smith	3	5
S Tomlinson	4	5
D Kavanagh	2	5
M Betteridge	3	5
S Robson	5	5
R Pollington	2	5
J Hann	5	5
J Bird	4	5
I Randle	4	5
S Terson- Burke	4	5
G Justham	1	1
S Jackson (Headteacher Lee Chapel & Accounting Officer)	5	5

Governance Review

The Management accounts and Key performance indicators are uploaded for all members and trustees of the board.

The finance and audit committee are a sub-committee of the main board of trustees. Its purpose is to:

- Oversee the budgets
- Oversee management accounts
- To review finance staff and look to centralise

Attendance at meetings in the year was as follows:

Governance	Meetings attended	Out of a possible
S Tomlinson	3	4
D Kavanagh	3	4
M Smith	4	4
S Robson	4	4
J Hann	3	4
S Jackson (Headteacher / Accounting Officer)	4	4

Review of Value for Money

As accounting officer, the CEO 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

Lee Chapel Multi Academy Trust

Governance Report

For the year ended 31 August 2025

wider societal outcomes as well as estate safety and management, achieved in return for the taxpayer resources received.

The accounting officer considers how the academy trust's use of its resources has provided good value for money during each academic year, and reports to the board of trustees where value for money can be improved, including the use of benchmarking data where appropriate. The accounting officer for the academy trust has delivered improved value for money during the year by continually amalgamating contracts across the trust.

The trust promotes fair competition through quotations and tenders, in accordance with its Financial Regulations to ensure that goods and services are secured in an economic, efficient and effective way. Contracts are reviewed to ensure that they are competitive and meet the schools ongoing requirements.

The trust regularly challenges quotes received and negotiates further reductions when appropriate in order to ensure that Best Value for Money is obtained. Staff are encouraged to obtain best value for money by researching alternative suppliers online for comparative products when spending their budgets. The Head teacher / head of school approves all purchase orders and regularly challenge to ensure that we are obtaining best value.

All schools have a procurement framework in place that ensures that formal tender processes are followed or three supplier quotes are obtained according to specified order value limits. The quality of service, contract prices and terms and conditions of the academy's suppliers are regularly reviewed and compared with the open market.

Income Generation

The academy has explored other opportunities to generate additional funds through Grants.

The Purpose of the System of Internal Control

The system of internal control is designed to manage risk to a reasonable level rather than to eliminate all risk of failure to achieve policies, aims and objectives; it can therefore only provide reasonable and not absolute assurance of effectiveness. The system of internal control is based on an on-going process designed to identify and prioritise the risks to the achievement of academy trust policies, aims and objectives, to evaluate the likelihood of those risks being realised and the impact should they be realised, and to manage them efficiently, effectively and economically. The system of internal scrutiny has been in place at the academy trust for the year ended 31 August 2025 and up to the date of approval of the annual report and financial statements.

Capacity to Handle Risk

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

The Risk and Control Framework

The academy trust's system of internal 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 periodic financial reports which are reviewed and agreed by the board of trustees;
- 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.
- identification and management of risks.

Lee Chapel Multi Academy Trust

Governance Report

For the year ended 31 August 2025

The board of trustees has considered the need for a specific internal audit function and has decided to appoint Juniper Education Services Ltd as internal auditor to complete the Internal Scrutiny function. Juniper Education Services Ltd provides assurance to the trustees and governors on financial matters by performing a range of checks. Juniper auditor complete the checks and provides the reports to the Chair of the Board, local Chair of Governors and head teacher on the operation of the systems of control and on the discharge of the governing body's financial responsibilities.

The Juniper Education Services Ltd auditor role includes giving advice in particular the checks carried out in the current period included:

- Testing of Cyber Security & system controls

The internal auditor completed a review in accordance with the Academies Financial Handbook and identified some areas for action plans to be put in place as a result of the review.

Review of Effectiveness

As accounting officer, the CEO 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 Juniper Educational Services Ltd auditor;
- the work of the external auditor;
- the financial management and governance self-assessment process;
- the work of the academy trust and Juniper Educational Services Ltd who have responsibility for the development and maintenance of the internal control framework.

The accounting officer has been advised of the implications of the result of their review of the system of internal scrutiny by the local governing body and plans to address weaknesses and ensure continuous improvement of the system are in place.

Conclusion

Based on the advice of the audit and risk committee and the accounting officer, the board of trustees is of the opinion that the academy trust has an adequate and effective framework for governance, risk management and control.

Approved by order of the members of the board of trustees on 26th November 2025 and signed on its behalf by:

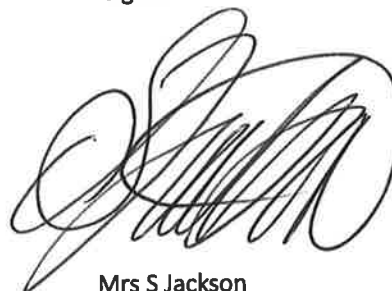
Signed



Mr C O'Callaghan

Chairperson

Signed



Mrs S Jackson

Accounting officer

**Lee Chapel Multi Academy Trust
Statement on Regularity, Propriety and Compliance
For the year ended 31 August 2025**

Statement on Regularity, Propriety and Compliance

As accounting officer of Lee Chapel Multi Academy Trust, I confirm that I have had due regard to the framework of authorities governing regularity, propriety and compliance, including the trust's funding agreement with DfE, and the requirements of the Academy Trust Handbook, including responsibilities for estates safety and management. I have also considered my responsibility to notify the academy trust board of trustees and DfE of material irregularity, impropriety and non-compliance with terms and conditions of all funding, including for estates safety and management

I confirm that I and the board of trustees are able to identify any material irregular or improper use of all funds by the academy trust, or material non-compliance with the framework of authorities.

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

Signed on 26th November 2025.

Signed

A handwritten signature in black ink, appearing to be 'S Jackson', written in a cursive style with large loops and flourishes.

Mrs S Jackson

Accounting officer

Lee Chapel Multi Academy Trust

Statement on Regularity, Propriety and Compliance

For the year ended 31 August 2025

Statement of Trustees' Responsibilities

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

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

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

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

The trustees are responsible for ensuring that in its conduct and operation the charitable company applies financial and other controls, which conform to the requirements both of propriety and of good financial management. They are also responsible for ensuring grants received from the 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 on 26th November 2025 and signed on its behalf by:

Signed



Mr C O'Callaghan

Chairperson

Lee Chapel Multi Academy Trust

Independent Auditor's Report on the Financial Statements to the Board of Trustees of Lee Chapel Multi Academy Trust

Opinion

We have audited the financial statements of Lee Chapel Multi Academy Trust ('the academy trust') for the year ended 31 August 2025 which comprise the Statement of Financial Activities, the Balance Sheet, Statement of Cash Flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice), including Financial Reporting Standard 102.

In our opinion the financial statements:

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

Basis for opinion

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

Conclusions relating to going concern

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

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

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

Other information

The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information. 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.

In connection with our audit of the financial statements, 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 audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based

Lee Chapel Multi Academy Trust

Independent Auditor's Report on the Financial Statements to the Board of Trustees of Lee Chapel Multi Academy Trust

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.

Opinions 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 strategic report and the trustees' annual report for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the strategic report and the trustees' annual report have been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the Trust and its environment obtained in the course of the audit, we have not identified material misstatements in the strategic report or the trustees' annual report.

We have nothing to report in respect of the following matters where 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 required for our audit.

Responsibilities of trustees

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

Auditor's 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 auditor's 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 aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with ISAs (UK) we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve

Lee Chapel Multi Academy Trust

Independent Auditor's Report on the Financial Statements to the Board of Trustees of Lee Chapel Multi Academy Trust

- collusion, forgery, intentional omissions, misrepresentations, or the override of internal control;
- obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purposes of expressing an opinion on the effectiveness of the Trust's internal control;
- evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the trustees;
- conclude on the appropriateness of the trustees' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Trust's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Trust to cease to continue as a going concern;
- evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Explanation as to what extent the audit was considered capable of detecting irregularities, including fraud

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.

The objectives of our audit in respect of fraud, are; to identify and assess the risks of material misstatement of the financial statements due to fraud; to obtain sufficient appropriate audit evidence regarding the assessed risks of material misstatement due to fraud, through designing and implementing appropriate responses to those assessed risks; and to respond appropriately to instances of fraud or suspected fraud identified during the audit. However, the primary responsibility for the prevention and detection of fraud rests with both management and those charged with governance of the Trust.

Our approach was as follows:

- we obtained an understanding of the legal and regulatory requirements applicable to the Trust through the use of permanent audit file information, updated this year for any changes that have been identified by management or by our own investigations and considered that the most significant are the Companies Act 2006, the Charities Act 2011, the Charities SORP 2019, the Academies Accounts Direction 2024 to 2025, the Academies Financial Handbook 2024 and UK financial reporting standards as issued by the Financial Reporting Council;
- we obtained an understanding of how the Trust complies with these requirements by discussions with management and those charged with governance and through reviews of relevant accounting and management records;
- we assessed the risk of material misstatement of the financial statements, including the risk of material misstatement due to fraud and how it might occur, based on our work as outlined above;

Lee Chapel Multi Academy Trust

Independent Auditor's Report on the Financial Statements to the Board of Trustees of Lee Chapel Multi Academy Trust

- we inquired of management and those charged with governance as to any known instances of non-compliance or suspected non-compliance with laws and regulations, using associated documentary evidence to better understand items of interest;
- based on this understanding, we designed specific appropriate audit procedures to identify instances of non-compliance with laws and regulations. As well as specific audit testing, this included approaching accounting records with an inquisitive and sceptical mind set such that we examined items that were felt to be of interest or of higher risk in this area, and obtaining additional corroborative evidence as required.

To address the risk of fraud through management override of controls, we carried out the following work:

- procedures were undertaken to identify any unusual or unexpected matters, and the rationale behind any such matters was examined;
- journal entries were reviewed to identify unusual transactions;
- judgements and assumptions made in determining the accounting estimates set out in the accounting policies were reviewed.

There are inherent limitations in the audit procedures described above. We are less likely to become aware of instances of non-compliance with laws and regulations that are not closely related to events and transactions reflected in the financial statements. Also, the risk of not detecting a material misstatement due to fraud is higher than the risk of not detecting one resulting from error, as fraud may involve deliberate concealment by, for example, forgery or intentional misrepresentations, or through collusion.

Use of our report

This report is made solely to the Trust'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 Trust's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to any party other than the Trust and its members as a body, for our audit work, for this report, or for the opinions we have formed.



James Saunders (Senior Statutory Auditor)
for and on behalf of Moore Kingston Smith LLP, Statutory Auditor

Date: *5 December 2025*

9 Appold Street
London
EC2A 2AP

Lee Chapel Multi Academy Trust

Independent Reporting Accountant's Report on Regularity to Lee Chapel Multi Academy Trust and the Secretary of State for Education

In accordance with the terms of our engagement letter dated 18 November 2024 and further to the requirements of the Department for Education (DfE), as included in the extant Framework and Guide for External Auditors and Reporting Accountants of Academy Trusts, we have carried out an engagement to obtain limited assurance about whether anything has come to our attention that would suggest, in all material respects, the expenditure disbursed and income received by Lee Chapel Multi Academy Trust during the period 1 September 2024 to 31 August 2025 have not been applied to the purposes intended by Parliament and that the financial transactions do not conform to the authorities which govern them.

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

Respective responsibilities of the accounting officer of Lee Chapel Multi Academy Trust and the reporting accountant

The accounting officer is responsible, under the requirements of Lee Chapel Multi Academy Trust's funding agreement with the Secretary of State for Education and the Academy Trust Handbook for ensuring that expenditure disbursed and income received is applied for the purposes intended by Parliament and the financial transactions conform to the authorities which govern them.

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

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

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

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

Lee Chapel Multi Academy Trust

Independent Reporting Accountant's Report on Regularity to Lee Chapel Multi Academy Trust and the Education and Skills Funding Agency (continued)

The work undertaken to draw to our conclusion includes:

- review of financial records for unusual transactions;
- sample testing expenditure transactions were reasonable, appropriate and appropriately authorised in accordance with the trust's procurement policy;
- review the minutes of the Board meetings;
- review the processes and controls to identify related party transactions and potential conflicts;
- obtaining formal representations from the Board and the accounting officer;
- reviewing any evidence of impropriety resulting from our work and determining whether it was significant enough to be referred to in our regularity report.

Conclusion

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

Moore Kingston Smith LLP



Date: *5 December 2025*

Moore Kingston Smith LLP
Reporting Accountant

9 Appold Street
London
EC2A 2AP

Lee Chapel Multi Academy Trust

Statement of Financial Activities

For the year ended 31 August 2025

(including Income and Expenditure Account)

	Note	Unrestricted Funds £000s	Restricted General Funds £000s	Restricted Fixed Asset Funds £000s	Total 2025 £000s	Total 2024 £000s
Income and endowments from:						
Donations and capital grants	2	313	110	665	1,088	15,083
Charitable activities						
Funding for the academy trust's educational operations	3	267	22,602	-	22,869	20,393
Other trading activities	4	1,011	16	-	1,027	698
Investments		1	-	-	1	-
Total Income		1,592	22,728	665	24,985	36,174
Expenditure on:						
Charitable activities:						
Academy trust educational operations	6	716	20,764	1,674	23,154	20,029
Total Expenditure		716	20,764	1,674	23,154	20,029
Net income/(expenditure)		876	1,964	(1,009)	1,831	16,145
Transfers between funds	14	-	(798)	798	-	-
Other recognised (losses)/gains:						
Actuarial (losses) / gains on defined benefit pension schemes	14, 23	-	(575)	-	(575)	(498)
Net movement in funds		876	591	(211)	1,256	15,647
Reconciliation of funds						
Total funds brought forward	14	3,283	399	53,718	57,400	41,753
Total funds carried forward		4,159	990	53,507	58,656	57,400

All of the trust's activities derive from continuing operations during the above two financial periods.

A Statement of Total Recognised Gains and Losses is not required as all gains and losses are included in the Statement of Financial Activities.

The detailed comparative information for the Statement of Financial Activities is included in note 25.

Lee Chapel Multi Academy Trust

Balance Sheet

As at 31 August 2025

	Notes	2025 £000s	2024 £000s
Fixed assets			
Tangible assets	11	53,507	53,718
		53,507	53,718
Current assets			
Debtors	12	628	357
Cash at bank and in hand		5,956	4,981
		6,584	5,338
Liabilities			
Creditors : amounts falling due within one year	13	(1,435)	(1,656)
Net current assets		5,149	3,682
Net assets excluding pension liability		58,656	57,400
Defined benefit pension scheme liability	23	-	-
Total net assets		58,656	57,400
Funds of the academy trust:			
Restricted funds			
Fixed asset fund	14	53,507	53,718
Restricted income fund	14	990	399
Total restricted funds		54,497	54,117
Unrestricted funds	14	4,159	3,283
Total funds		58,656	57,400

The financial statements on pages 30 to 53 were approved by the trustees, and authorised for issue on 26/11/25 and are signed on their behalf by:



Mr Craig O'Callaghan
Chair of the Board of Governors

Company number 07673871

Lee Chapel Multi Academy Trust

Statement of Cash Flows

For the year ended 31 August 2025

	Notes	2025 £000	2024 £000
Cash flows from operating activities			
Net cash provided by operating activities	18	1,772	2,193
Cash flows used in investing activities	19	(797)	(1,169)
Change in cash and cash equivalents in the reporting period	20	<u>975</u>	<u>1,024</u>
Cash and cash equivalents at 1 September 2024		4,981	3,957
Cash and cash equivalents at 31 August 2025	20	<u>5,956</u>	<u>4,981</u>

Lee Chapel Multi Academy Trust

Notes to the Financial Statements For the year ended 31 August 2025

1 Statement of Accounting Policies

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

Company Information

Lee Chapel Multi Academy Trust is a private company limited by guarantee, domiciled and incorporated in England and Wales. The registered office is The Knares, Basildon, Essex, SS16 5RU.

Basis of Preparation

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

The financial statements are prepared in sterling, which is the functional currency of the academy trust. Monetary amounts in these financial statements are rounded to the nearest thousand pounds.

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

Income

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

- **Government grants**

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

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

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

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

1 Statement of Accounting Policies (continued)

Income (continued)

- **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.
- **Other Income**
Other income, including the hire of facilities, is recognised in the period it is receivable and to the extent the goods have been provided or on completion of the service.
- **Donated fixed assets**
Where the donated good is a fixed asset, it is measured at fair value, unless it is impractical to measure this reliably, in which case the cost of the item to the donor is used. The gain is recognised as income from donations and a corresponding amount is included in the appropriate fixed asset category and depreciated over the useful economic life in accordance with the academy trust's accounting policies.
- **Interest receivable**
Interest receivable is included within the Statement of Financial Activities on an accruals basis.

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 the 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 in proportion to the levels of GAG income, and depreciation charges allocated on the portion of the asset's use.

- **Expenditure on Raising Funds**
This includes all expenditure incurred by the academy trust to raise funds for its charitable purposes and includes costs of all fundraising activities events and non-charitable trading.
- **Expenditure on Charitable Activities**
These are costs incurred on the academy trust's educational operations, including support costs and costs relating to governance of the academy trust apportioned to charitable activities.

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.

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

1 Statement of Accounting Policies (continued)

Tangible Fixed Assets (continued)

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, at rates calculated to write off the cost of each asset on a straight-line basis over its expected useful life, as follows:

- | | |
|------------------------------------|-------------------------------------|
| • Long leasehold land | 125 years, on a straight line basis |
| • Long leasehold buildings | 2% straight line |
| • Fixtures, fittings and equipment | 15% - 20% straight line |
| • Computer hardware | 20% - 33.33% straight line |
| • Motor vehicles | 15% straight line |

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 carrying value of fixed assets and their recoverable amounts are recognised as impairments. Impairment losses are recognised in the Statement of Financial Activities.

Liabilities

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

Investments

Investments are shown at the year end at market value. Realised and unrealised gains and losses on investment are dealt with through the Statement of Financial Activities and the Income from Investments is included in the year in which it is receivable.

Leased Assets

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

Financial Instruments

The academy trust only holds basic financial instruments as defined in FRS 102. Financial instruments are recognised in the academy trust's balance sheet when the academy trust becomes party to the contractual provisions of the instrument. The financial assets and financial liabilities of the academy trust and their measurement basis are as follows:

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

1 Statement of Accounting Policies (continued)

Financial Instruments (continued)

• **Financial assets**

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

• **Cash at bank**

Cash and cash equivalents include cash in hand, deposits held at call with banks, and other short-term liquid investments with original maturities of three months or less.

• **Financial liabilities**

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

Taxation

The academy trust is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the academy trust is potentially exempt from taxation in respect of income or capital gains received within categories covered by chapter 3 part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Employee Benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the academy trust is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

Pensions Benefits

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

Teachers' Pension Scheme

The TPS is an unfunded scheme and contributions are calculated to spread the cost of pensions over employees' working lives with the academy trust in such a way that the pension cost is a substantially level percentage of current and future pensionable payroll. The contributions are determined by the Government Actuary based on quadrennial valuations using a prospective unit credit method. TPS is an unfunded multiemployer 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.

1 Statement of Accounting Policies (continued)

Local Government Pension Scheme

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

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

Fund Accounting

Unrestricted funds represent those resources which may be used towards meeting any of the charitable objects of the trust at the discretion of the trustees.

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

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

Critical Accounting Estimates and Areas of Judgment

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

Critical accounting estimates and assumptions

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

Local Government Pension Scheme

The present value of the Local Government Pension Scheme defined benefit liability depends on a number of factors that are determined on an actuarial basis using a variety of assumptions. The assumptions used in determining the net cost (income) for pensions include the discount rate. Any changes in these assumptions, which are disclosed in note 23, will impact the carrying amount of the pension liability. Furthermore a roll forward approach which projects results from the latest full actuarial valuation performed at 31 March 2022 has been used by the actuary in valuing the pensions liability at 31 August 2025. Any differences between the figures derived from the roll forward approach and a full actuarial valuation would impact on the carrying amount of the pension liability.

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

2 Donations and capital grants

	Unrestricted Funds £000s	Restricted Funds £000s	Total 2025 £000s	Total 2024 £000s
Capital grants	-	665	665	1,480
Donated fixed assets	-	-	-	13,293
Other donations	313	110	423	310
2025 total	313	775	1,088	15,083
2024 total	161	14,922	15,083	

3 Funding for the Academy Trust's educational operations

Educational operations	Unrestricted Funds £000s	Restricted Funds £000s	Total 2025 £000s	Total 2024 £000s
DfE / ESFA grants				
General Annual Grant (GAG)	-	15,647	15,647	14,016
Other DfE / ESFA grants				
UIFSM	-	387	387	414
Pupil premium	-	1,409	1,409	1,384
Teachers pay grant	-	263	263	250
Teachers pension grant	-	316	316	127
Others	-	773	773	882
	-	18,795	18,795	17,073
Other Government grants				
Local authority grants	-	3,499	3,499	2,798
Special educational projects	-	10	10	-
	-	3,509	3,509	2,798
Other income from the academy trust's educational operations	267	298	565	522
2025 total	267	22,602	22,869	20,393
2024 total	229	20,164	20,393	

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

4 Other trading activities

	Unrestric Funds £000s	Restricted Funds £000s	Total 2025 £000s	Total 2024 £000s
Hire of Facilities	-	15	15	14
Other generated income	1,011	1	1,012	684
2025 total	1,011	16	1,027	698
2024 total	681	17	698	

5 Expenditure

	Staff Costs £000s	Non Pay Premises £000s	Expenditure Other £000s	Total 2025 £000s	Total 2024 £000s
Academy's educational operations					
Direct costs	16,453	-	922	17,375	16,340
Allocated support costs	2,022	1,066	2,691	5,779	3,689
2025 total	18,475	1,066	3,613	23,154	20,029
2024 total	16,120	2,288	1,621	20,029	

Net income/(expenditure) for the period includes:

	2025 £000s	2024 £000s
Operating lease rentals	85	54
Depreciation	1,674	1,215
Fees payable to auditor:		
Audit	43	38
Non-audit services:	3	3

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

6 Charitable activities

	Total 2025 £000s	Total 2024 £000s
Direct costs - educational operations	17,375	16,340
Support costs - educational operations	5,779	3,689
	23,154	20,029

	Total 2025 £000s	Total 2024 £000s
Analysis of support costs		
Support staff costs	2,022	1,875
Depreciation	1,674	1,215
Technology costs	221	213
Premises costs	1,066	671
Legal costs - other	12	112
Other support costs	1,313	54
Current pension cost of LGPS net of employer contributions (note 23)	(575)	(498)
Governance costs	46	47
	5,779	3,689

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

7 Staff

a. Staff costs

Staff costs during the period were:

	Total 2025 £000s	Total 2024 £000s
Wages and salaries	13,998	12,455
Social security costs	1,455	1,067
Operating costs of defined benefit pension schemes	2,985	2,503
Apprenticeship levy	-	48
	18,438	16,073
Staff training	36	47
Supply staff costs	1	-
	18,475	16,120

b. Staff numbers

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

	2025 No.	2024 No.
Teachers	141	135
Administration and support	525	383
Management	23	24
	690	542

c. Higher paid staff

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

	2025 No.	2024 No.
£60,001 - £70,000	5	6
£70,001 - £80,000	3	2
£80,001 - £90,000	2	-
£90,001 - £100,000	1	1

d. Key management personnel

Key management personnel of the academy trust comprise the trustees and the senior management team as listed on page 1. The total amount of employee benefits (including employer pension contributions) received by key management personnel for their services to the academy trust was £1,875,000 (2024: £1,808,000).

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

8 Related Party Transactions - Trustees' Remuneration & Expenses

One or more trustees has been paid remuneration or has received other benefits from employment with the academy trust. The headteacher 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.

S L Jackson (headteacher and trustee):	
Remuneration	£120,001 - £125,000 (2024: £115,001 - £120,000)
Employer's pension contributions	£30,001 - £35,000 (2024: £25,001 - £30,000)

No trustees received reimbursements for expenses during the year ended 31 August 2025, (2024: none).

9 Trustees' and Officers' Insurance

In accordance with normal commercial practice the Lee Chapel Primary School, Greensted Primary School, Northlands Primary School, The Phoenix Primary School, Ryedene Primary and Nursery School and Chapel Hill Primary School within the multi academy trust have purchased insurance to protect governors and officers from claims arising from negligent acts, errors or omissions occurring whilst on academy business. The insurance provides cover up to £5,000,000 for each school on any one claim. The Trust is covered under the school insurance for the members and trustees and the cost of this insurance is included in the total insurance cost and is not separately identifiable.

10 Disclosure of Central Services

The academy trust has provided central services to its academies during the year, including human resources, financial services, legal services and educational support services.

Central services have been charged on a basis of 1% on General Annual Grant income and a fixed cost per school.

The actual amounts charged during the year were as follows:

	2025	2024
	£000s	£000s
Lee Chapel Primary School	79	71
Greensted Primary School	107	59
Northlands Primary School and Nursery	67	183
The Phoenix Primary School & Nursery	64	272
Ryedene Primary School and Nursery	49	138
Chapel Hill Primary School	384	204
	750	927

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

11 Tangible Fixed Assets

	Leasehold Land and Buildings £000s	Leasehold Improvements £000s	Furniture & Equipment £000s	Computer Equipment £000s	Total £000s
Cost					
At 1 September 2024	57,875	-	2,306	870	61,051
Additions	683	-	614	166	1,463
Disposals	-	-	(22)	(22)	(44)
At 31 August 2025	58,558	-	2,898	1,014	62,470
Depreciation					
At 1 September 2024	5,164	-	1,421	748	7,333
Charged in period	1,152	-	403	119	1,674
Eliminated on disposals	-	-	(22)	(22)	(44)
At 31 August 2025	6,316	-	1,802	845	8,963
Net book values					
At 31 August 2025	52,242	-	1,096	169	53,507
At 1 September 2024	52,711	-	885	122	53,718

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

12 Debtors

	2025 £000s	2024 £000s
VAT recoverable	77	45
Prepayments and accrued income	551	312
	<u>628</u>	<u>357</u>

13 Creditors: Amounts falling due within one year

	2025 £000s	2024 £000s
Other taxation and social security	289	228
Other creditors	377	332
Accruals and deferred income	769	1,096
	<u>1,435</u>	<u>1,656</u>

Deferred income

	2025 £000s	2024 £000s
Deferred Income at 1 September 2024	443	489
Released from previous years	(443)	(489)
Resources deferred in the year	469	443
Deferred Income at 31 August 2025	<u>469</u>	<u>443</u>

At the balance sheet date, the academy trust had received grant income which relates to the following accounting year, therefore this income has been deferred.

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

14 Funds	Balance at 1 September 2024 £000s	Incoming Resources £000s	Resources Expended £000s	Gains, Losses & Transfers £000s	Balance at 31 August 2025 £000s
Restricted general funds					
General Annual Grant (GAG)	234	15,647	(14,258)	(1,230)	393
UIFSM	-	387	(387)	-	-
Pupil Premium	-	1,409	(1,409)	-	-
Other DfE/ESFA grants	-	773	(773)	-	-
Local Authority grants	96	3,499	(3,499)	(96)	-
Other income	69	1,013	(1,013)	528	597
Pension Reserve	-	-	575	(575)	-
	<u>399</u>	<u>22,728</u>	<u>(20,764)</u>	<u>(1,373)</u>	<u>990</u>
Restricted fixed asset funds					
DfE/ESFA and other capital i	23,069	665	(1,151)	798	23,381
Leased gifts	30,646	-	(522)	-	30,124
Local authority capital grant	3	-	(1)	-	2
	<u>53,718</u>	<u>665</u>	<u>(1,674)</u>	<u>798</u>	<u>53,507</u>
Total Restricted Funds	<u>54,117</u>	<u>23,393</u>	<u>(22,438)</u>	<u>(575)</u>	<u>54,497</u>
Unrestricted funds	<u>3,283</u>	<u>1,592</u>	<u>(716)</u>	<u>-</u>	<u>4,159</u>
Total funds	<u>57,400</u>	<u>24,985</u>	<u>(23,154)</u>	<u>(575)</u>	<u>58,656</u>

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

Restricted general funds

This includes all monies received from the DfE to carry out the objectives of the academy trust. It includes the GAG fund which must be used for the normal running costs of the academy trust. Under the funding agreement with the Secretary of State, the academy trust is not subject to GAG carry forward

Other government grants consist of other grants received from Government and Local Authority including Early Years Funding and Statemented Educational Needs which are used for resourcing children and supporting teacher training within the academy trust.

The pension reserve represents the academy trust's share of the deficit in the local government pension scheme.

Restricted fixed asset funds

Restricted fixed asset funds includes all fixed assets owned by the academy trust. It includes grants received from the DfE and other sources to finance the academy trust's fixed assets, and the annual charges for depreciation of these assets.

Unrestricted funds

Unrestricted funds represent those resources which may be used towards meeting any of the charitable objects of the academy trust at the discretion of the trustees.

Transfers

The transfer of £798,000 (2024: £1,169,000) has arisen due to the purchase of fixed assets during the year funded by the academy trust's GAG funding.

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

14 Funds (continued)

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

	Balance at 1 September 2023 £000s	Incoming Resources £000s	Resources Expended £000s	Gains, Losses & Transfers £000s	Balance at 31 August 2024 £000s
Restricted general funds					
General Annual Grant (GAG)	134	14,016	(11,772)	(2,144)	234
UIFSM	-	414	(414)	-	-
Pupil premium	-	1,384	(1,384)	-	-
Teachers pay grant	-	250	(250)	-	-
Teachers pension grant	-	127	(127)	-	-
Other grants	-	882	(882)	-	-
Local Authority grants	-	2,798	(2,642)	(60)	96
Pension reserve	-	-	498	(498)	-
Other income	1,007	459	(1,246)	(151)	69
	<u>1,141</u>	<u>20,330</u>	<u>(18,219)</u>	<u>(2,853)</u>	<u>399</u>
Restricted fixed asset funds					
DfE/ESFA and other capital iten	21,397	1,480	(977)	1,169	23,069
Leased gifts	17,589	13,293	(236)	-	30,646
Local authority capital grant	5	-	(2)	-	3
	<u>38,991</u>	<u>14,773</u>	<u>(1,215)</u>	<u>1,169</u>	<u>53,718</u>
Total Restricted Funds	40,132	35,103	(19,434)	(1,684)	54,117
Unrestricted funds	1,621	1,071	(595)	1,186	3,283
Total funds	41,753	36,174	(20,029)	(498)	57,400

Analysis of funds by academy

Fund balances at 31 August 2025 were allocated as follows:

	2025 £000s	2024 £000s
Lee Chapel Primary School	1,832	1,482
Greensted Primary School	540	276
Northlands Primary School and Nursery	1,005	846
The Phoenix Primary School & Nursery	881	718
Ryedene Primary and Nursery School	361	194
Chapel Hill Primary School & Nursery	503	126
Central Services	27	40
Total before fixed assets and pension reserve	5,149	3,682
Restricted fixed asset fund	53,507	53,718
	<u>58,656</u>	<u>57,400</u>

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

14 Funds (continued)

Total cost analysis by academy

Expenditure incurred by each academy during the period was as follows:

	Teaching and Educational Support Staff Costs £000s	Other Support Staff Costs £000s	Educational Supplies £000s	Other Costs (excluding Depreciation) £000s	Total 2025 £000s
Lee Chapel Primary School	4,555	255	81	732	5,623
Greensted Primary School	2,245	321	36	362	2,964
Northlands Primary School and Nursery	3,703	454	75	410	4,642
The Phoenix Primary School & Nursery	3,145	548	81	482	4,256
Ryedene Primary and Nursery School	1,923	342	69	347	2,681
Chapel Hill Primary School & Nursery	845	103	30	176	1,154
Central services	-	-	-	160	160
Academy Trust	16,416	2,023	372	2,669	21,480

	Teaching and Educational Support Staff Costs £000s	Other Support Staff Costs £000s	Educational Supplies £000s	Other Costs (excluding Depreciation) £000s	Total 2024 £000s
Lee Chapel Primary School	4,320	739	134	576	5,770
Greensted Primary School	2,073	315	42	314	2,744
Northlands Primary School and Nursery	3,317	433	56	416	4,222
The Phoenix Primary School & Nursery	2,900	593	110	472	4,075
Ryedene Primary and Nursery School	1,630	292	60	288	2,269
Chapel Hill Primary School	-	-	-	80	80
Central services	5	1	-	(353)	(347)
Academy Trust	14,245	2,373	402	1,793	18,813

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

15 Analysis of net assets between funds

Fund balances at 31 August 2025 are represented by:

	Unrestricted Funds £000s	Restricted General Funds £000s	Restricted Fixed Asset Funds £000s	Total Funds £000s
Tangible fixed assets	-	-	53,507	53,507
Current assets	4,159	2,425	-	6,584
Current liabilities	-	(1,435)	-	(1,435)
Total net assets	<u>4,159</u>	<u>990</u>	<u>53,507</u>	<u>58,656</u>

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

	Unrestricted Funds £000s	Restricted General Funds £000s	Restricted Fixed Asset Funds £000s	Total Funds £000s
Tangible fixed assets	-	-	53,718	53,718
Current assets	3,283	2,055	-	5,338
Current liabilities	-	(1,656)	-	(1,656)
Total net assets	<u>3,283</u>	<u>399</u>	<u>53,718</u>	<u>57,400</u>

16 Capital Commitments

	2025 £000s	2024 £000s
Contracted for, but not provided in the financial statements	<u>250</u>	<u>199</u>

17 Commitments under operating leases

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

	2025 £000s	2024 £000s
Amounts due within one year	81	67
Amounts due between one and five years	187	169
	<u>268</u>	<u>236</u>

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

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

	2025	2024
	£000s	£000s
Net income for the reporting period (as per the statement of financial activities):	1,831	16,145
Adjusted for:		
Depreciation (note 11)	1,674	1,215
Inherited fixed assets	-	(13,293)
Capital Grants from DfE and other capital income	(665)	(1,480)
Interest receivable	(1)	-
Defined benefit pension scheme cost less contributions payable (note 23)	(575)	(498)
Defined benefit pension scheme finance cost (note 23)	-	-
(Increase)/Decrease in debtors	(271)	126
Decrease in creditors	(221)	(22)
Net Cash provided by operating activities	<u>1,772</u>	<u>2,193</u>

19 Cash flows from investing activities

	2025	2024
	£000s	£000s
Interest from investments	1	-
Purchase of tangible fixed assets	(1,463)	(2,649)
Capital grants from DfE/ESFA and other capital income	665	1,480
Net cash provided by / (used in) investing activities	<u>(797)</u>	<u>(1,169)</u>

20 Analysis of cash and cash equivalents

	2025	2024
	£000s	£000s
Cash in hand and at bank	5,956	4,981
	<u>5,956</u>	<u>4,981</u>

21 Analysis of change in net debt

	At 1	Cash	At 31
	September	flows	August
	2024	£000s	2025
	£000s	£000s	£000s
Cash in hand and at bank	4,981	975	5,956
	<u>4,981</u>	<u>975</u>	<u>5,956</u>

Lee Chapel Multi Academy Trust

Notes to the Financial Statements (continued)

For the year ended 31 August 2025

22 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.

23 Pension and Similar Obligations

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

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

Contributions amounting to £377,000 were payable to the schemes at 31 August 2025 (2024: £332,000) and are included within other creditors payable within one year.

Teachers' Pension Scheme

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

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

Valuation of the Teachers' Pension Scheme

The Government Actuary, using normal actuarial principles, conducts a formal actuarial review of the TPS in accordance with the Public Service Pensions (Valuations and Employer Cost Cap) Directions 2014 published by HM Treasury every 4 years. The aim of the review is to ensure scheme costs are recognised and managed appropriately and the review specifies the level of future contributions.

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

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

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

23 Pension and Similar Obligations (continued)

Valuation of the Teachers' Pension Scheme (continued)

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

The employer's pension costs paid to TPS in the period amounted to £1,895,000 (2024: £1,543,000).

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

Under the definitions set out in FRS102, the TPS is a multi-employer pension scheme. The academy trust is unable to identify its share of the underlying assets and liabilities of the plan. Accordingly, the academy trust has taken advantage of the exemption in FRS 102 and has accounted for its contributions to the scheme as if it were a defined contribution scheme. The trust has set out above the information available on the scheme.

Local Government Pension Scheme

The LGPS is a funded defined benefit pension scheme, with the assets held in separate trustee-administered funds. The total contribution made for the year ended 31 August 2025 was £2,052,000 (2024: £1,817,000), of which employer's contributions totalled £1,671,000 (2024: £1,481,000) and employees' contributions totalled £381,000 (2024: £336,000). The agreed contribution rates for future years is 25.0% for employers and 5.0% - 6.5% for employees.

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 and on 21 July 2022, the Department for Education reaffirmed its commitment to the guarantee, with a parliamentary minute published on GOV.UK.

Principal Actuarial Assumptions

	At 31 August 2025	At 31 August 2024
Rate of increases in salaries	3.55%	3.80%
Rate of increase for pensions in payment/inflation	2.55%	2.80%
Discount rate of scheme liabilities	6.05%	5.10%

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

23 Pension and Similar Obligations (continued)

Principal Actuarial Assumptions (continued)

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

	At 31 August 2025	At 31 August 2024
<i>Retiring today</i>		
Males	21.80 years	20.70 years
Females	24.10 years	23.30 years
<i>Retiring in 20 years</i>		
Males	23.40 years	22.00 years
Females	25.80 years	24.70 years

Sensitivity Analysis

Approximate monetary increase/(decrease) to the obligation as a result of the following changes in assumptions at 31 August 2025 are set out below:

	At 31 August 2025 £000s	At 31 August 2024 £000s
Discount rate +0.1%	12,945	13,784
Discount rate -0.1%	13,452	14,379
Long term salary increase +0.1%	13,203	14,088
Long term salary increase -0.1%	13,187	14,066
Mortality assumption - 1 year increase	13,503	14,467
Mortality assumption - 1 year decrease	12,945	13,698
Pension increases and deferred revaluation +0.1%	13,452	14,375
Pension increases and deferred revaluation -0.1%	12,945	13,787

The Trust's share of the assets and liabilities in the scheme and the expected rates of return were:

	Fair value at 31 August 2025 £000s	Fair value at 31 August 2024 £000s
Equity instruments	10,657	8,740
Gilts	260	269
Property	1,487	1,093
Cash and other liquid assets	297	266
Alternative assets	2,874	2,323
Other	3,347	2,866
Total market value of assets	18,922	15,557

The actual return on scheme assets was £760,000 (2024: £827,000)

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

23 Pension and Similar Obligations (continued)

Amount recognised in the statement of financial activities	2025 £000s	2024 £000s
Current service cost	1,213	1,042
Net interest (income)/cost	(117)	59
Total amount recognised in the SOFA	1,096	1,101

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

	2025 £000s	2024 £000s
At 1 September	14,077	12,204
Current service cost	1,213	1,042
Interest cost	721	646
Employee contributions	381	336
Actuarial (gain)/loss	(2,921)	213
Benefits paid	(276)	(364)
At 31 August	13,195	14,077

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

	2025 £000s	2024 £000s
At 1 September	15,557	12,580
Interest income	838	705
Other actuarial gains/(losses)	751	819
Employee contributions	381	336
Employer contributions	1,671	1,481
Benefits paid	(276)	(364)
At 31 August	18,922	15,557

The net asset of £5,727,000 (2024: £1,480,000) has not been recognised in accordance with FRS102 paragraph 28.22. The movement in asset value restricted is included in the actuarial gain in the Statement of Financial Activities.

Lee Chapel Multi Academy Trust
Notes to the Financial Statements (continued)
For the year ended 31 August 2025

24 Related Party Transactions

Owing to the nature of the academy trust 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. No related party transactions took place in the period of account, other than certain trustees' remuneration and expenses already disclosed in note 8.

25 Comparative Statement of Financial Activities

	Unrestricted Funds £000s	Restricted General Funds £000s	Restricted Fixed Asset Funds £000s	Total 2024 £000s
Income and endowments from:				
Donations and capital grants	161	149	14,773	15,083
Charitable activities:				
Funding for the academy trust's educational operations	229	20,164	-	20,393
Other trading activities	681	17	-	698
Total Income	<u>1,071</u>	<u>20,330</u>	<u>14,773</u>	<u>36,174</u>
Expenditure on:				
Charitable activities:				
Academy trust educational operations	595	18,219	1,215	20,029
Total Expenditure	<u>595</u>	<u>18,219</u>	<u>1,215</u>	<u>20,029</u>
Net income/(expenditure)	476	2,111	13,558	16,145
Transfers between funds	<u>1,186</u>	<u>(2,355)</u>	<u>1,169</u>	<u>-</u>
Other recognised (losses)/gains:				
Actuarial (losses) / gains on defined benefit pension schemes	-	(498)	-	(498)
Net movement in funds	<u>1,662</u>	<u>(742)</u>	<u>14,727</u>	<u>15,647</u>
Reconciliation of funds				
Total funds brought forward	1,621	1,141	38,991	41,753
Total funds carried forward	<u>3,283</u>	<u>399</u>	<u>53,718</u>	<u>57,400</u>