



## South West Lakes District Scouts

### Annual Review 2023-24



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- Active Groups
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## Chair's Summary

I'm proud to continue leading the South West Lakes Trustee Board in what is now my 11<sup>th</sup> year as Chair. I continued to be excited about our developing plans to transform the way we deliver Scouting to our Young People and I was really pleased to see the District grow by 6% in 2023/24 with clear and ambitious plans for future Growth in coming years.

The Trustee Board remains focussed on its core role of supporting the District to deliver high quality, safe Scouting for our Young People and none of this would be possible were it not for a diverse and experienced group of Trustees, all of who volunteer their time despite many other commitments in their home, work and Scouting lives.

The District remains in a relatively sound position financially although our Facilities (District Campsite at Urswick and District HQ in Barrow) are both ageing facilities which continues to require maintenance and further updating.

It has been great to see continued recognition of Volunteers and I want to add my personal thanks to all – both those who regularly provide programme activities to our Young People and to those working behind the scenes to ensure the Charity complies with UK Law and Scout Association Policy, Organisation & Rules.

Andrew Lowther – District Chair

## South West Lakes District Scouts

### Receipts and Payments Account For the year ended 31st March 2024

	2024	2023
	£	£
Total receipts for the year	52,953	25,864
Total payments for the year	<u>53,456</u>	<u>52,659</u>
Net (deficit)/surplus for the year	(503)	(26,795)
Cash, bank and similar funds brought forward	<u>73,069</u>	<u>99,864</u>
Cash, bank and similar funds carried forward	<u><u>72,566</u></u>	<u><u>73,069</u></u>

The above account and accompanying Statement of Assets and Liabilities were approved by the Trustees on 9th June 2024 and signed on their behalf by

*A Lowther*

Mr A Lowther - Chairman

## Active Groups – 2023/24

1st Ulverston

1<sup>st</sup> & 7th Barrow-in-Furness

17th Barrow-in-Furness

11th Barrow-in-Furness

1st Broughton

3rd Duddon

1st Duddon

1st Millom

2nd Ulverston

Walney Churches

Duddon Dragon ESU

Xenolith ESU

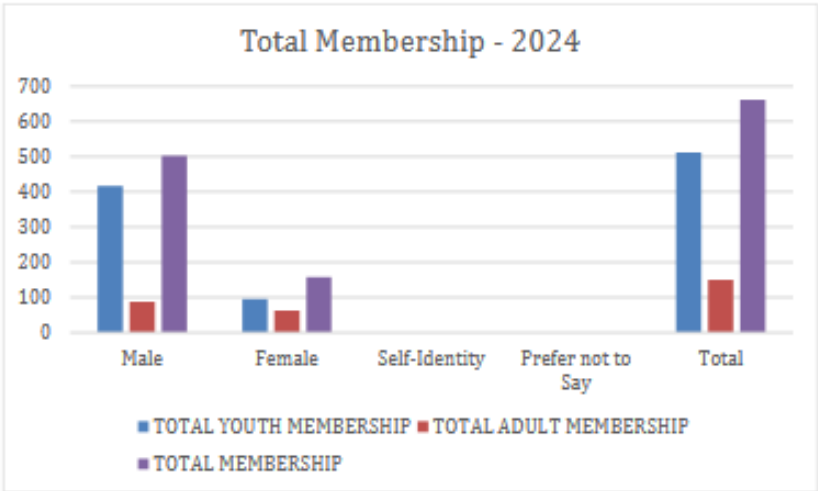
Yeti Young Leader ESU



Current Membership & Growth Plans

The past year has been one of Growth – both Young People and Adult Volunteers. The breakdown of current membership is below, and highlights are:

- 6% increase in total Youth Membership
- 511 Young People (6 to 24) regularly enjoy Scouting in South West Lakes
- 33% increase in Explorer Unit Membership (14 to 17 year olds)
- 150 Adult Volunteers (an increase of 5%)
- 2 Target for opening of Squirrel Dreys to extend our reach to 4 to 6 year olds



## 2024 Growth Plan

The 2024 Growth Plan is being led by two key Volunteers supported by the HQ Growth & Communities Team.

Current priorities are:

- Continued support for existing Groups
- Work on Perception through presence at local events, resulting in adult recruitment
- Consideration of best options for opening of Squirrel Dreys
- Opening of one additional Cub Section in Autumn 2024
- Expansion of Explorer Scout provision in Barrow. To take advantage of HQ financial and practical support this is hoped to be a Barrow ESU opening in late 2024.

## Adult Awards

We are delighted that a number of scout volunteers across the South West Lakes district continue to be recognised for their service and it was great to see South West Lakes represented at the annual Windsor Parade. Awards this year have ranged from Silver Wolf – the highest award made by the Scout Association to Chief Scouts Commendations – recognising regular volunteering across the District.

## Appointments Advisory Committee

The Appointments Advisory Panel have met via "Zoom" 7 times since the last AGM.

- 1 New Leader Appointment is currently being processed and will meet with the Appointments Advisory Panel when all relevant details are received.
- 13 Provisional appointments have been approved.
- 27 Occasional Helper appointments have been given DBS clearance.
- 38 DBS renewal checks have been carried out.
- 5 Role changes have been made.
- 1 Appointment change has been made.
- 1 Leader has taken an additional appointment.



- 14 Leader Appointments have been cancelled for varying reasons.
- 22 Occasional Helper Appointments have been cancelled.

As can be seen from the report above it has again been a very full year with new Leaders, Occasional Helpers, Appointment and Role Changes.

The Panel meet as and when required generally via "ZOOM".

Brian Butterfield  
Appointments Secretary

## Urswick



The site continues to be well used, both by local Groups and those outside of South West Lakes, including Groups using the site as base of Expeditions and visits to the wider local area.

Our Warden, Anthony Cullen decided to stand down this year to focus his efforts elsewhere in Scouting – grateful thanks to Anthony for his hard work over the past few years.

As we embed out new Volunteering Culture, the management of Urswick has now been transferred to the District Facilities Sub-team – this consists of a blend of experience and significant Youth involvement leading to continued development of the site as an asset of Young People locally and further afield.

Work around the site continues and relies on regular hard work by a core team of volunteers together with wider support at working weekends. The work includes regular maintenance, continued improvement to buildings and woodland to ensure the site remains safe.

To book the site contact - [urswick.warden@southwestlakesscouts.org.uk](mailto:urswick.warden@southwestlakesscouts.org.uk)

## District Lead Volunteer's Commentary

The last twelve months have been another great year for South West Lakes Scouts. I never fail to be impressed by the enthusiasm and dedication of our Volunteers who strive weekly to provide skills and safe adventure for Young People throughout the District.

My personal highlights have been:

- The weekly efforts of our many volunteers who quietly and without fuss provide safe adventure for our Young People
- The behind-the-scenes efforts from District and Group Trustees who govern our activities and ensure we remain compliant with UK Law and the Scout Association Policy, Organisation and Rules
- The establishment of a Steering Group of Young Adults (14 to 24 team) who are steering and guiding key decisions in the District – this will ensure that the District remains vibrant and relevant in the years to come
- The establishment of a Young Leader Unit which will provide opportunities for 14 to 18 year olds to develop their Leadership skills in collaboration with others
- Continued development of the Urswick Campsite, including establishing a service team with a wide range of experience and enthusiasm
- Continued fun and adventure for Young People and Adults alike

2024/25 will continue to challenge us – our focus on Safety and Compliance must remain, there will be continued pressure to grow our District to increase our offering to Young People and the way we Volunteer will start to change as the Transformation and our new way of Volunteering start to take effect. These will be wide ranging, some we will be comfortable with and some may take some time to get used to.

As always, it's a privilege to volunteer with you all - thank you!



# **South West Lakes District Scouts**

## **Financial Statements for the year ended 31st March 2024**

### **Contents**

1 Independent Examiners Report

2 Receipts and Payments Account

3 Receipts for the Year

4 Payments for the Year

5 Statement of Assets

# **Independent Examiner's Report to the Trustees of South West Lakes District Scouts**

I report on the financial statements of South West Lakes District Scouts for the year ended 31st March 2024 which are set out on pages 2 to 5.

## **Respective responsibilities of trustees and examiner**

The charity's trustees are responsible for the preparation of the financial statements. The charity's trustees consider that an audit is not required for this year (under section 43(2) of the Charities Act 1993 (the Act)) and that an independent examination is needed.

It is my responsibility to :

- examine the accounts (under section 43(3)(a) of the act);
- follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 43(7)(b) of the act); and
- state whether particular matters have come to my attention.

## **Basis of independent examiner's statement**

My examination was carried out in accordance with General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an opinion on the financial statements.

## **Independent examiner's statement**

In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements;

- to keep accounting records in accordance with section 41 of the 1993 Act; and
- to prepare financial statements which accord with the accounting records and comply with the accounting requirements of the Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached

**R M Everett**

**9th June 2024**

**Mr R M Everett - Accountant**

## South West Lakes District Scouts

### Receipts and Payments Account For the year ended 31st March 2024

	2024 £	2023 £
Total receipts for the year	52,953	25,864
Total payments for the year	<u>53,456</u>	<u>52,659</u>
Net (deficit)/surplus for the year	(503)	(26,795)
Cash, bank and similar funds brought forward	<u>73,069</u>	<u>99,864</u>
<b>Cash, bank and similar funds carried forward</b>	<b><u>72,566</u></b>	<b><u>73,069</u></b>

The above account and accompanying Statement of Assets and Liabilities were approved by the Trustees on 9th June 2024 and signed on their behalf by

*A Lowther*

**Mr A Lowther - Chairman**

# South West Lakes District Scouts

## Receipts for the year ended 31st March 2024

	2024 £	2023 £
<b>Donations and Grants</b>		
Rathbone Investment management	1,500	-
Francis C Scott Trust	1,500	-
David Snowden	1,000	-
Asda Foundation - re St Georges Day	-	1,000
Ulverston Town Council - re St Georges Day	-	1,000
	-	
	<u>4,000</u>	<u>2,000</u>
<b>Income from Properties</b>		
Camp Site at Urswick	5,673	5,150
Park Drive Headquarters	998	935
	<u>6,671</u>	<u>6,085</u>
<b>Activities</b>		
Resource Shop and Badge Sales	2,618	3,114
District Xenolith Explorer Unit	9,937	6,165
Duddon Dragons Explorer Unit	3,200	5,746
2023 Subs from Groups	16,496	-
St Georges Day Event Income	1,720	-
3rd Duddon Reimbursement of Expenses Paid	978	-
1st Leven Valley - Closed Group Funds	3,066	-
Winter Camp Income - Duddon Dragons	483	-
TSA Charity Account Income re 1st Broughton Group	3,500	-
Cub Camp Income	-	2,701
Other income from groups and activities	271	40
	<u>42,269</u>	<u>17,766</u>
<b>Sundry Receipts</b>		
Norweb Wayleave	13	13
	<u>13</u>	<u>13</u>
<b>Total receipts for the year</b>	<u>52,953</u>	<u>25,864</u>

## South West Lakes District Scouts

### Payments for the year ended 31st March 2024

	2024 £	2023 £
<b>Urswick Camp Site</b>		
General Rates	73	220
Water Rates	513	525
Light and Heat	1,678	2,153
Insurance	1,306	1,169
Repairs and Maintenance	1,761	1,568
	<u>5,331</u>	<u>5,635</u>
<b>Park Drive Hut</b>		
Rent & General Rates	16	84
Water Rates	586	132
Light and Heat	699	994
Insurance	871	829
Repairs and Maintenance	276	-
	<u>2,448</u>	<u>2,039</u>
<b>Activities</b>		
Scouting Expenses including capitation	24,400	23,238
Resource Shop and Badge Purchases	2,500	2,499
District Xenolith Explorer Unit	6,040	9,898
Duddon Dragons Explorer Unit	4,326	6,644
St Georges Day Event	7,763	-
Cub camp Expenses	-	2,285
District Media Licence	384	349
	<u>45,413</u>	<u>44,913</u>
<b>Sundry Expenditure</b>		
Telephone, Travel and Sundries	188	-
Bank Charges	76	72
	<u>264</u>	<u>72</u>
<b>Total payments for the year</b>	<u>53,456</u>	<u>52,659</u>

# South West Lakes District Scouts

## Statement of Assets and Liabilities as at 31st March 2024

	2024 £	2023 £
<b>Cash and Bank Balances</b>		
Bank Accounts		
- Current Account	58,530	61,939
- Shop/Badge Account	2,840	2,722
- District Xenolith Explorer Unit	5,098	1,123
- Duddon Dragons Explorer Unit	5,027	6,153
Cash in Hand		
- Treasurer	39	26
- HQ Float	100	100
- Urswick Warden	338	334
- District Xenolith Explorer Unit	594	672
	<u>72,566</u>	<u>73,069</u>
<b>Investment Assets</b>		
IM CAF UK Equity Fund	18,652	16,854
(The original amount invested in October 2003 was £10925)	<u>18,652</u>	<u>16,854</u>
<b>Other Monetary Assets</b>		
Amounts owed by groups for Capitation & Costs	18,882	17,314
Stock on Hand - Resource Shop and Badges	2,845	3,862
	<u>21,727</u>	<u>21,176</u>
<b>Total Monetary Assets</b>	<u>112,945</u>	<u>111,099</u>

### Assets Retained for the the Charity's Own Use

In addition to the monetary assets listed above the charity also owns the following items which have been purchased over many years at a total historical cost of £156124 (2023 - £156124)  
The current value of these items has not been quantified at 31st March 2024

Freehold - Urswick campsite, Flat Woods, Great Urswick  
Campsite buildings, huts, camping equipment and furniture  
Toilet and shower block at Urswick campsite  
Building & Contents of Scout HQ Park Drive, Barrow-in-Furness  
Badge machine, laminator and other equipment  
Marquee tent  
Toaster, plates and cups, boiler & PA System and carry case

The freehold title to the campsite at Flat Woods, Urswick, Nr Ulverston, is vested in the Scout Association Trust Corporation as Trustees for the District.

### Restricted Funds

During previous years the charity received donations totalling £23000 to pay for Local Development Projects. Payments of £18525 have been made towards the cost of the Local Development Projects and therefore the balance of £4475 is carried forward as a restricted fund.

During previous years £4504 was received from the former Duddon and High Furness District Executive from their Closed Group Fund. It has been decided that this will be used only to provide financial assistance to new groups. During the year £275 was given to groups for set up costs - the balance of the fund is now £4229

In previous years the charity received donations of £12000 from the John Winder Fund.  
The donor has indicated that the capital should only be used for long term capital projects

In previous years the charity received a donation of £8000 from the JR Oldfield Deceased Will Trust  
This donation has been designated as being for long term capital projects.

During the year we received £3500 in grant funding for 1st Broughton Group.  
This is being held on their behalf until issues with their bank account are resolved



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