

# Elevating Devon's NHS Mental Wellbeing Services

# open up



## Annual Report 2024-25

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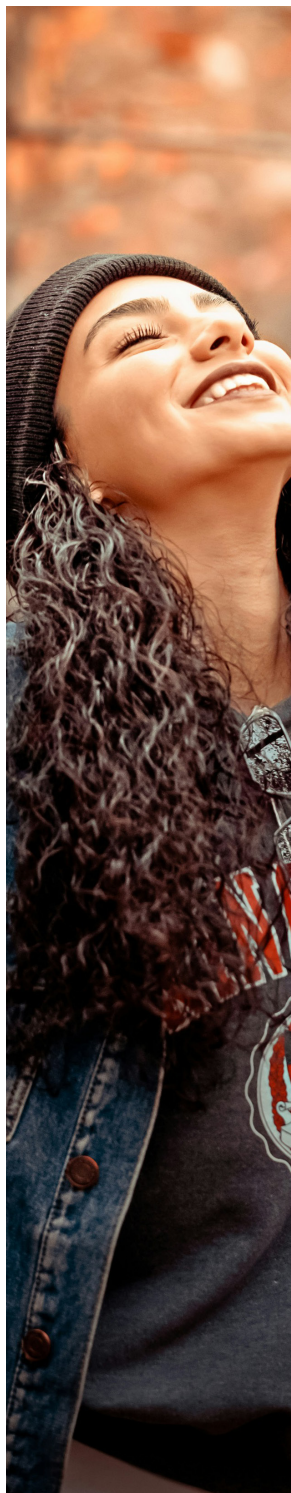
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# Welcome

from Dr Venura Perera,  
Chair of the Charitable Funds Committee



**It is with immense pride that I welcome you to our Annual Report for 2024/25 – a year of transformation, growth and renewed purpose.**

This has been a landmark year for our charity as we embraced a bold new identity. Open Up, the official charity of Devon Partnership NHS Trust, is more than just a new name. It represents our commitment to enhancing, improving and bringing innovation to mental health, learning disability and neurodiversity care across Devon and the South West.

Formerly known as the DPT Charity, we have rebranded to better reflect our purpose and values – to open up conversations, possibilities and opportunities for the people we support.

Our refreshed purpose and strategy are rooted in one clear ambition: to make a tangible, visible and lasting difference to the lives of individuals and families affected by mental health, learning disabilities and neurodiversity challenges. By working alongside NHS colleagues, community partners and our incredible supporters, Open Up is building a healthier and more inclusive society – one that listens, values and empowers every person.

This past year has seen incredible progress. With support from NHS Charities Together and our generous donors, we've invested in sustainable projects that transform care environments, enhance specialist therapies and prioritise wellbeing for both patients and staff. We have made a difference in a range of areas, including funding the New Leaf vocational rehabilitation service polytunnel, supporting new mums at Dainton Copse, and improving facilities and creating joyful moments at Christmas. Each initiative reflects our commitment to compassionate, person-centred care.

Equally important has been our work behind the scenes – investing in the future of Open Up through a new website, Customer Relationship Management (CRM) system and vibrant brand that will enable us to connect more effectively with our community and champion our cause far and wide.

As Chair, I'm deeply grateful to our team, our partners and every individual who has supported us this year. You have helped us push boundaries, think differently and bring people together in meaningful ways. Thanks to you, we are not only sustaining essential support – we are reimagining what's possible.

Looking ahead to 2025/26, I'm excited about the momentum we've built. With new tools at our disposal, a growing network of supporters and a strong strategy to guide us, Open Up is well-placed to expand its reach, deepen its impact and continue building a legacy of hope, support and opportunity.

Thank you for being part of our journey. Together, we will keep opening up doors, minds and hearts – and create a future where everyone can live well, feel heard and thrive.

**Dr Venura Perera,**

Chair of the Charitable Funds Committee for 2024/25

Associate Non-Executive Director of Devon Partnership NHS Trust



Venura has worked in research, software engineering, data science and business intelligence and is passionate about the benefits that can be delivered through technological innovation. Venura is an advocate for Equality, Diversity and Inclusion (EDI) and encouraging organisational cultures that promote diversity.

# How your donations and fundraising have helped this year

## Building connections in communities

This year saw continued support for the Chaplaincy-led Community Connection roles in two of our community mental health teams. With £100k committed during the pilot phase, the roles are already strengthening ties between services and local communities, particularly for those who feel isolated or struggle to access support.

“These roles are about building trust and offering a consistent presence in people’s lives,” explained Jez Brown, Lead Chaplain at Devon Partnership NHS Trust.



“ By working alongside individuals and communities, we help build the human connections that support recovery and wellbeing. ”

## Nature, nurture and perinatal wellbeing

Babes in the Woods, funded through The Little Something Fund, offered new mothers and their babies a calming, restorative space in nature. In partnership with the Trust's Perinatal Mental Health Team, monthly sessions at Dainton Copse Forest School near Newton Abbot combined woodland walks, fireside chats, mindfulness and creativity to reduce anxiety and nurture emotional wellbeing.



“The calming atmosphere, the sounds of the woods and the open space made a huge difference to my mood.”

Selina Dare, Occupational Therapy Lead, added, “This is life-changing work. We’ve created a space for mums to reconnect with themselves and each other in a way traditional services often struggle to offer.”

Many mothers now meet informally beyond the sessions and have formed lasting support networks.

### **Festive support for young people and families**

The annual Children and Family Health Devon Christmas Hamper Project reached a significant milestone this year, marking its fifth anniversary of spreading festive cheer to care-experienced young people across Devon and Torbay. This year, 250 hampers filled with essentials, treats, and thoughtful gifts were delivered to young people who may not have a strong support network at home. Each hamper serves as a reminder that these young people are not forgotten and that their community values them.

“ While a hamper might seem small, its significance is immense. It shows young people they are cared for, and that they are held in mind and supported by a wider community that cares about their wellbeing. ”

**Jade Simmons**, Clinical Team Manager, Children and Family Health Devon



The project, which began modestly in 2020 with just 100 hampers, has now grown significantly, highlighting the power of community generosity. This year's hampers provided much-needed support during the holidays.

The ongoing success of this project reflects the strong partnerships between Open Up, local businesses, NHS colleagues, and generous donors, and is testament to the collective impact of our community in making a positive difference in the lives of young people.

At Langdon Hospital, the Dewnans Centre hosted a festive Christmas event, bringing together patients, families and staff for a day of workshops, games and even llamas! The event celebrated recovery, creativity and community while fostering a sense of togetherness.

"It was wonderful to see everyone enjoying the day," said Tom Woodd, Lead Forensic Social Worker. "Events like this strengthen relationships and make a lasting impact. They remind us that recovery isn't just about clinical care; it's about connection and joy."



Located near Dawlish, Langdon Hospital provides medium and low secure services for men from the South West who require inpatient mental health care in a secure environment due to the nature and degree of the risks involved, often in connection with the legal system.



## Enhancing everyday experiences

At Torbay Health and Wellbeing Clinic, a new recliner chair, though seemingly a small addition, has had a profound impact on patient experience. The comfortable, supportive chair offers patients a much-needed space to relax during their visits, creating a more welcoming and compassionate environment.

“They feel listened to and cared for, which is so important,” shared Helen Williams, Flow Manager. “It’s the little touches like this that make a huge difference to how patients feel during their time at the clinic.”

Similarly, at Abbotsvale in Bideford, the new patient entertainment system has transformed the waiting area. With soothing music and informative displays, it creates a more dignified, calming space that reduces anxiety and makes the wait more pleasant and less stressful. Abbotsvale is used by a range of services, including TALKWORKS and older people’s mental health and learning disabilities. “It’s significantly improved the patient experience,” said Dulcie Chilcott, Business Co-ordinator. “It makes the waiting area feel more professional and welcoming, and it protects patient confidentiality by masking conversations from the reception desk.”

## Investing in staff wellbeing

A dedicated £20k fund was launched this year to support staff health and wellbeing, made possible by Charity Lottery proceeds. It has already funded access to a gym at Wonford House and other tailored wellness activities.

“Donations have made a huge difference,” said Steve Smeeth, Head of Staff Health and Wellbeing. “They’re helping us care for the people who care for others.”

## Innovative perinatal support

The Little Something Fund, established in memory of Charlotte Morley, a staff member and passionate advocate for perinatal mental health, enabled a perinatal conference that brought together over 100 professionals, peer supporters and individuals with lived experience. The event fostered new collaborations and shared valuable tools for care.

Amanda Taylor, Perinatal Service Manager, shared, “By bringing people together face-to-face, we’re rebuilding networks and improving outcomes for parents, babies, and professionals alike.”

Additionally, twelve staff members completed training to deliver the Parents’ Comfort Zone course, a peer-informed programme that blends practical tools, creativity and connection to reduce anxiety in new parents.

“This course is already helping parents feel less isolated and more confident,” said Selina Dare.

## Connection and comfort

At Franklyn Hospital in Exeter, two specialist wards, Rougemont and Belvedere, support older adults with complex mental health needs, including dementia, depression and severe anxiety.

A visit from a therapy Shetland pony brought joy and calm to over 30 patients, creating a moment of connection and comfort.

“Bringing a therapy pony onto the ward gave patients something truly memorable,” said Ward Manager Vicky Shorters. “It boosted wellbeing and lifted everyone’s spirits.”

Sensory sessions, run in partnership with the Royal Albert Memorial Museum, offered hands-on experiences with historic objects and themed materials, helping to spark memories and emotional connection.



“These sessions bring the outside world in,” said Harry O’Keefe, Occupational Therapy Technician. “They offer grounding and engagement, especially during long stays.”

Festive gift giving brought warmth and cheer to the wards at Franklyn Hospital. Every patient received a carefully chosen present ranging from toiletries and cosy socks to sweet treats, all wrapped and delivered with care.

The initiative not only brightened spirits but also encouraged positive interaction and strengthened the sense of belonging among residents and staff. It offered a welcome moment of celebration and kindness that made everyone feel seen, valued and connected.



## Supporting recovery through nature and purpose

New Leaf, part of Devon Partnership NHS Trust's Vocational Rehabilitation Service, helps adults living with mental health conditions move toward employment through therapy, training and supported horticultural work. The service creates opportunities to build confidence, skills and wellbeing in a structured, nature-based environment.

A £64k investment will fund a new accessible growing structure at New Leaf, replacing ageing polytunnels. This upgrade will extend the reach of their therapeutic horticulture programme and ensure inclusive access throughout the year. Construction is planned for 2025/26, with long-term recovery and environmental sustainability at its core.

As part of its green efforts, New Leaf participants handcrafted 43 habitat boxes, funded by Open Up, to support wildlife at Langdon Hospital. These boxes – for birds, owls, bats and insects – were installed along the Buzzard Trail, enriching outdoor spaces for patients and staff and encouraging biodiversity.



“These habitat boxes are part of building a thriving natural environment that benefits people and wildlife alike. It’s about creating calm and connection across the site.”

Collette Germon, Sustainability and Energy Manager

# A new chapter

**This year has marked a significant turning point in our charity's journey as we unveiled our new identity – Open Up, the official charity of Devon Partnership NHS Trust. Formerly known as the DPT Charity, our new name represents much more than a rebrand. It reflects a renewed commitment to opening up opportunities, conversations and support for people living with mental health conditions, learning disabilities and neurodiversity challenges across Devon and the South West.**

Our rebrand was made possible through a Development Grant from NHS Charities Together, which enabled us to invest in our future. This vital funding allowed us to shape a bold new visual identity, launch a refreshed purpose and strategy, create a modern website, implement a new CRM system (Customer Relationship Management) and produce engaging promotional materials. These developments have strengthened our operational foundations, improved our communication and positioned us to reach and inspire a growing community of supporters.

We also took a major step forward with the launch of our new purpose statement and strategic pillars, which now guide every part of our work. At the heart of this strategy is a clear ambition: to improve lives by enhancing, improving and bringing innovation to mental wellbeing services, while also championing inclusivity, collaboration and sustainability.

Our strategy sets out five core pillars:

- 6 **Foundations** – strengthening our infrastructure for long-term impact
- 6 **Engagement** – raising awareness and reducing stigma through education and outreach
- 6 **Collaboration and partnerships** – building meaningful relationships that deliver shared value
- 6 **Funding** – securing and diversifying resources to support our vision
- 6 **Grant making** – directing support to initiatives that align with our goals and values

Our work is built on the belief that everyone should feel listened to, cared for and able to live their life to the full. The new strategy ensures that we place lived experience, prevention and community connection at the centre of everything we do. It also ensures that we maintain a strong focus on staff wellbeing and long-term, sustainable outcomes for the people and communities we serve.

To support this new chapter, we've also expanded our digital presence. Open Up is now on Facebook and LinkedIn – platforms that help us connect with our community, share updates and raise awareness of the issues about which we care so deeply. These channels will play a key role in helping us grow our supporter base, promote campaigns and celebrate the achievements of those we work alongside.

With a stronger identity, clearer direction and more ways to connect, Open Up is ready to embrace the future. We are incredibly grateful to everyone who has supported us through this exciting period of change – and we look forward to continuing this journey together as we work to transform lives across our region.

# Purpose statement

Our charity enhances, improves and brings innovation to mental health, learning disability and neurodiversity care in Devon, as well as working tirelessly to educate and raise awareness of these issues within our local area.

We exist to change lives and make a difference to the people we support by enhancing, improving and bringing innovation to mental wellbeing services.

Open Up works closely with our partners to provide services for children and adults in the South West, creating better outcomes and building a healthier community.


Our aim, first and foremost, is to have a tangible, visible and positive impact on our patients, their carers and the staff who support them.

The work we do improves day-to-day experiences for all with clear, long-term benefits. We raise funds, support innovative projects, communicate and constantly seek new ways to add extra value to NHS mental wellbeing services and collaborate with other like-minded organisations. We pride ourselves on tackling the future head on and making sure that sustainability is at the forefront of all our projects.

We want to break down the barriers around mental health, learning disability and neurodiversity. We want a society where everyone is valued for who they are. By working together, we know Open Up will spread awareness, offer practical help and fresh opportunities so that everyone we work with feels listened to, cared for and able to live their life to the full, today and every day.



# What we do at Open Up



**Our focus is to broaden the support available to people receiving care and treatment in Devon and, where appropriate, across the wider South West. While we exist to enhance and add value to the services delivered by the Trust, our support is not limited to activity within NHS settings.**

This means we can support a wide range of projects and initiatives both within the NHS Trust and its services, as well as community-based projects, collaborative initiatives and preventative approaches. There must be a clear and lasting benefit for the people who use the Trust's services, the staff who support them or the wider systems that enable care. From community-based prevention work to digital innovation and service development, all align with our purpose and contribute to the Trust's mission. Whether it's improving patient environments, promoting staff wellbeing or funding innovative new approaches, our goal is to complement and strengthen what the NHS can offer.

All funding requests must demonstrate how they elevate, enhance or improve care and must not replace core NHS provision. Our newly revised Funding Requests Guidelines, introduced this year, ensure that every application aligns with our values and delivers real benefit.

We are not able to fund activities that benefit individuals alone, replace lost NHS equipment or services, or cover standard NHS responsibilities. We remain focused on delivering value for money, maintaining public trust and funding projects that clearly benefit the wider community.

Our grants often support:

- 6 Patient-focused initiatives that enhance care or experience
- 6 Improvements to indoor and outdoor environments
- 6 Group wellbeing activities or exercise programmes
- 6 Therapeutic tools and equipment that support recovery
- 6 Pilot projects and innovation not yet covered by NHS commissioning.

Every request we consider is carefully reviewed by our funding panel to ensure that it aligns with Open Up's guidelines and values. By doing this, we ensure that money raised is directed towards the greatest possible impact - for patients, staff and the communities supported by Devon Partnership NHS Trust.

Our broader support allows us to act responsively, creatively and collaboratively. Whether through direct funding or strategic partnerships, we remain committed to building a healthier, more inclusive future for mental health, learning disability and neurodiversity care.



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NO T-SHIRT

# Celebrating our fundraisers

This year, our supporters have truly gone above and beyond to raise vital funds for Open Up through a series of extraordinary and exciting fundraising challenges. From heart-pounding ziplining and skydiving to completing the Exeter Great West Run and navigating the bouncy obstacles of the Exeter 5K Inflatable, our community's passion and dedication has been nothing short of inspiring.

**The Little Something Winter Ball**, held in November, was a lovely event that not only brought together friends, family and colleagues in a celebration, but also raised an astounding £6.7k for the Little Something Fund. Hosted at the Froginwell Vineyard and Cider Barn, this glittering evening was a tribute to the incredible legacy of Charlotte, a passionate perinatal mental health practitioner who left an indelible mark on those she worked with.

In her memory, the Little Something Fund continues to provide crucial support to women and families in Devon affected by perinatal mental health issues. This vital fund ensures that families receive the care and resources they need, often outside the scope of NHS services. The Winter Ball, which would not have been possible without the generous sponsorship of Kandy Toys, was organised by Charlotte's friends and colleagues from Devon Partnership NHS Trust – Clare, Amanda and Suzie. Their dedication and hard work turned the evening into a wonderful success, celebrating Charlotte's lasting impact and continuing her legacy of care.



Among those embracing their own fundraising challenges was Zoe who tackled the Velocity Zipline, the world's fastest zip line, located in Penrhyn Quarry, North Wales. She described her exhilarating experience: "It was terrifying for a second, and then you feel like you're flying and don't want it to end!" Her passion for taking on challenges comes from her commitment to support animal therapies at Franklyn Hospital, which has been greatly beneficial for both staff and patients.

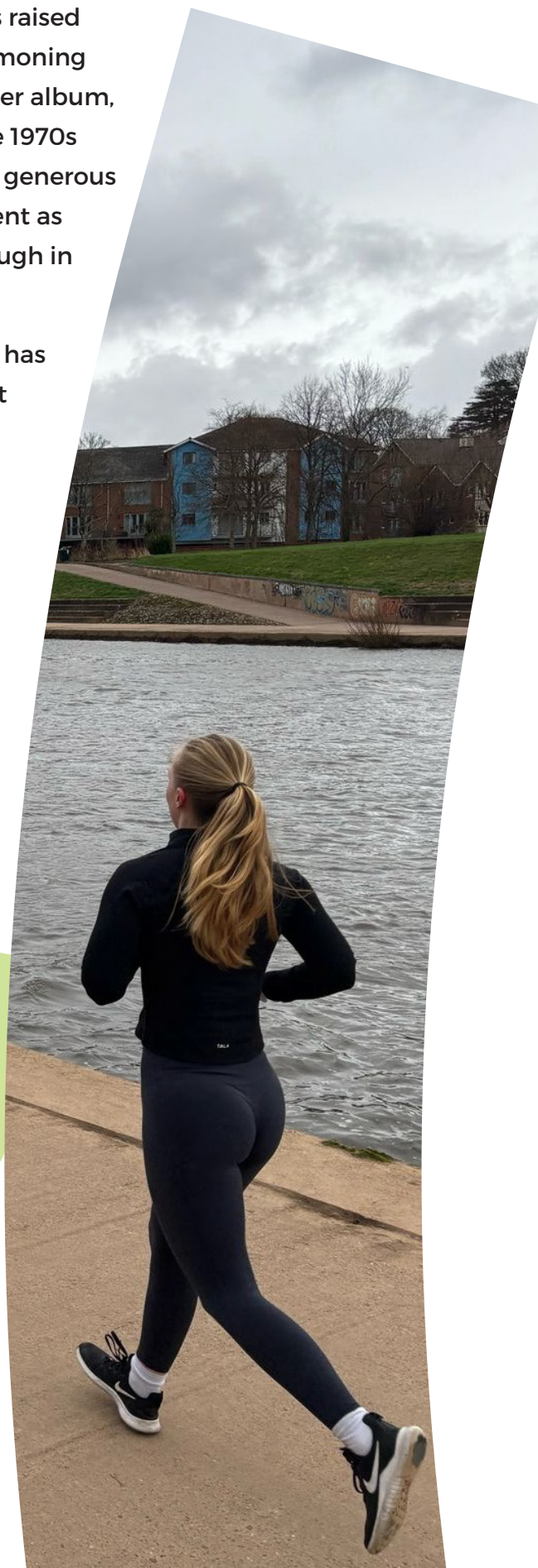
Meanwhile, Paul reached new heights, by completing a 15,000ft tandem charity skydive with Skydive Buzz at Dunkeswell Airfield in Devon. Reflecting on the experience, He said: "It was great to raise money for Open Up while checking something off my bucket list. The freefall was breathtaking, and once the chute opened, the view was incredible and so peaceful." His support for children's mental health and its vital services for young people was a driving force behind his challenge.



In the music world, Tracy, known as Sonic Method, has raised an impressive £1k through the sale of her album, *Summoning of the Paradigm Spark*, released in September 2024. Her album, inspired by the zodiac and nostalgic sounds of the late 1970s and early 1980s, has captivated listeners and garnered generous donations, contributing to Open Up's work. Tracy's talent as a musician and her dedication to the cause shine through in every note.

The Coombehaven Ward Team at The Cedars in Exeter has also taken the initiative to raise funds for a new patient gym through their ambitious 'GymHaven' campaign, and they are already making encouraging progress on their fundraising journey.

We are incredibly proud of all our supporters who have dedicated their time, effort and passion to these amazing fundraising initiatives. Your generosity truly makes a difference to the communities we serve, and we are grateful for every one of you.



## Other sources of fundraising



We continue to work in partnership with Your Charity Lottery, now with a renewed focus on enhancing staff wellbeing across Devon Partnership NHS Trust. The lottery offers participants the chance to win 82 cash prizes every week, including a weekly jackpot of £1k and a rollover prize of up to £10k. From just £1 per week, people can play responsibly while making a real difference to the wellbeing of NHS staff and, in turn, the care provided to patients.

This year, the Charity Lottery raised £1.8k and contributed to our growing efforts to support a positive and healthy working environment for our dedicated teams.

Find out how to join here:

[www.openup.org.uk/ways-to-support-us/lottery](http://www.openup.org.uk/ways-to-support-us/lottery)



We are proud to be a member of NHS Charities Together, whose continued support has been instrumental in strengthening our charity's capacity and sustainability. As part of a national network of NHS charities, we benefit from shared learning, campaigns, training opportunities and vital funding, all made possible through public fundraising for the NHS.

During 2024/25, we successfully completed a significant programme of development work thanks to a £30k grant from NHS Charities Together. This investment has allowed us to enhance our brand identity, develop a new website and implement a modern customer relationship management system.

These improvements have already made a tangible difference - streamlining our operations, strengthening our communications and enhancing our ability to connect with supporters, partners and the wider public. This support is helping to ensure we are well-equipped for the future and better able to serve our communities across Devon and beyond.

## Leaving a legacy of hope

While we didn't receive any personal legacies this year, we're still passionate about raising awareness of this thoughtful and lasting way to support our work.

A gift in your will is more than a donation – it's a meaningful way to continue helping others beyond your lifetime. Legacy giving allows people to support the areas that matter most to them, whether that's mental health support, rehabilitation or community outreach. Every gift helps us have more impact and improve more lives across Devon and the South West.

By choosing to remember Open Up in your will, you're helping to build a brighter future. Your legacy can ensure that the support and care we provide today continues for generations to come.

If you'd like to find out more about how a legacy gift could make a difference, we'd be happy to talk with you.



# Next steps for Open Up



As we reflect on a transformative year of progress and innovation, Open Up is looking firmly to the future. With strong foundations now in place, we are well-positioned to expand our reach, deepen our impact and continue working closely with our partners, patients and supporters across Devon and the South West.

## Deepening impact

In the year ahead, we will focus on how we measure and share the real difference our work makes. We are committed to developing a clear impact measurement framework that tracks outcomes across fundraising, communications, partnerships and projects. This will help us continuously improve, celebrate successes and ensure every pound raised is making a meaningful difference to people's lives.

## Strengthening communications

Our refreshed branding, CRM system and website now offer powerful platforms to share stories, raise awareness and engage the community. In 2025/26, we will increase our presence across social media and email. We aim to bring our purpose to life in accessible, inspiring and inclusive ways – ensuring that more people know who we are, what we stand for and how to get involved.



### **Innovating fundraising**

With key fundraising structures now in place, our focus is on innovation and sustainability. We will explore new giving opportunities including legacy giving and ethical corporate partnerships, while growing our digital fundraising capabilities. At the heart of our approach will be authentic storytelling, engaging campaigns and community events that reflect the values and needs of those we support.

### **Embedding inclusion and lived experience**

We are proud to support people living with mental health challenges, learning disabilities and neurodiversity – and we believe in co-producing our work wherever possible. In the coming year, we will explore new ways to bring lived experience to the forefront, through collaborative projects and inclusive governance practices that reflect the diversity of our community.

### **Activating partnerships**

Partnership working remains central to our approach. We will look to formalise regional collaborations with like-minded organisations and NHS charities, co-delivering initiatives and campaigns that benefit our communities. We also hope to engage more with local councils and businesses around shared wellbeing and social value goals.

### **Future-proofing**

Looking ahead, we are committed to ensuring Open Up remains a sustainable, agile and resilient organisation. We will begin shaping a three-to-five-year plan focused on income growth, resource development and navigating the evolving healthcare landscape. We know the challenges are significant but with the continued support of our community, we are ready to meet them.

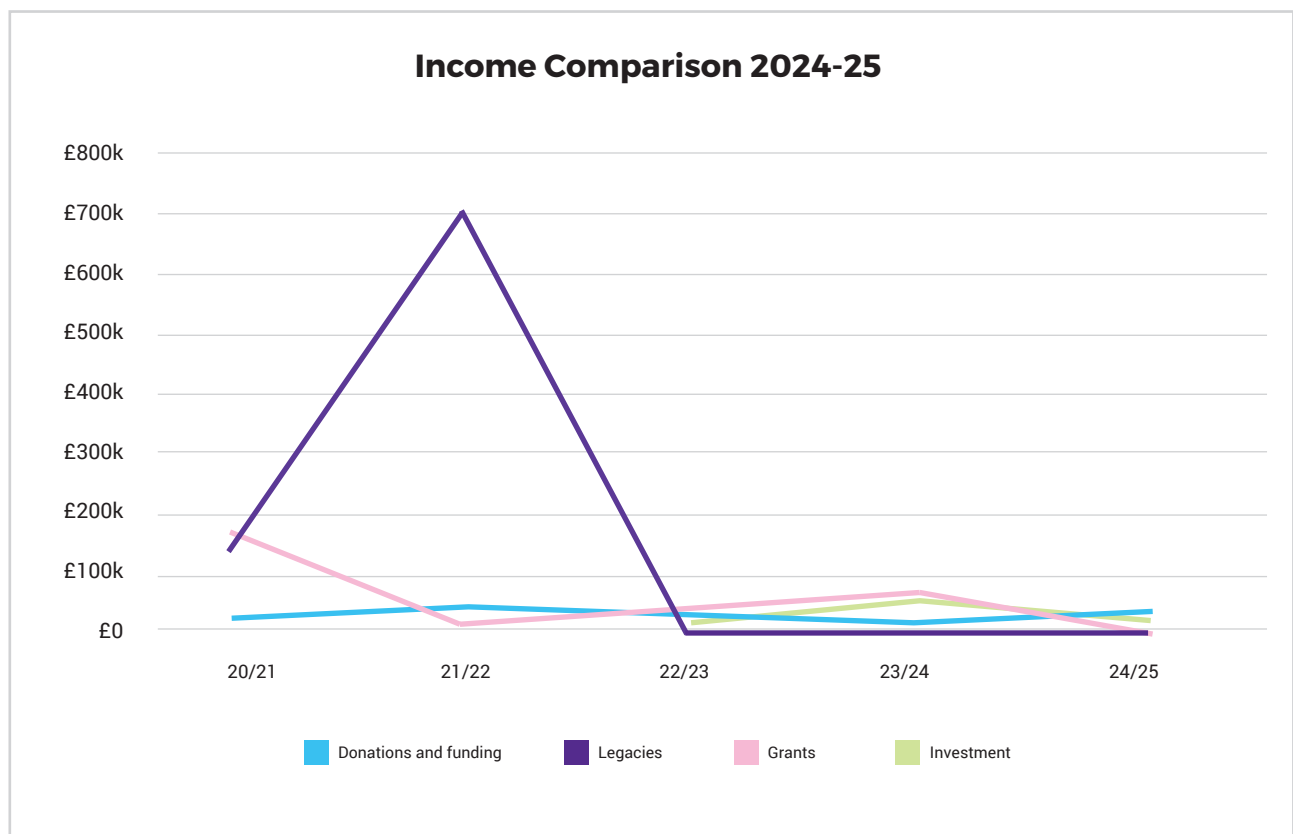
# Finance report

## Income for the year ended 31 March 2025

In the 2024/25 financial year, the Charity had an income of £43k made up of:

- £2k received through Just Giving and donations.
- £19k received from investments.
- £22k in fundraising events.

The following chart shows a comparison of income for this year against the previous four years:

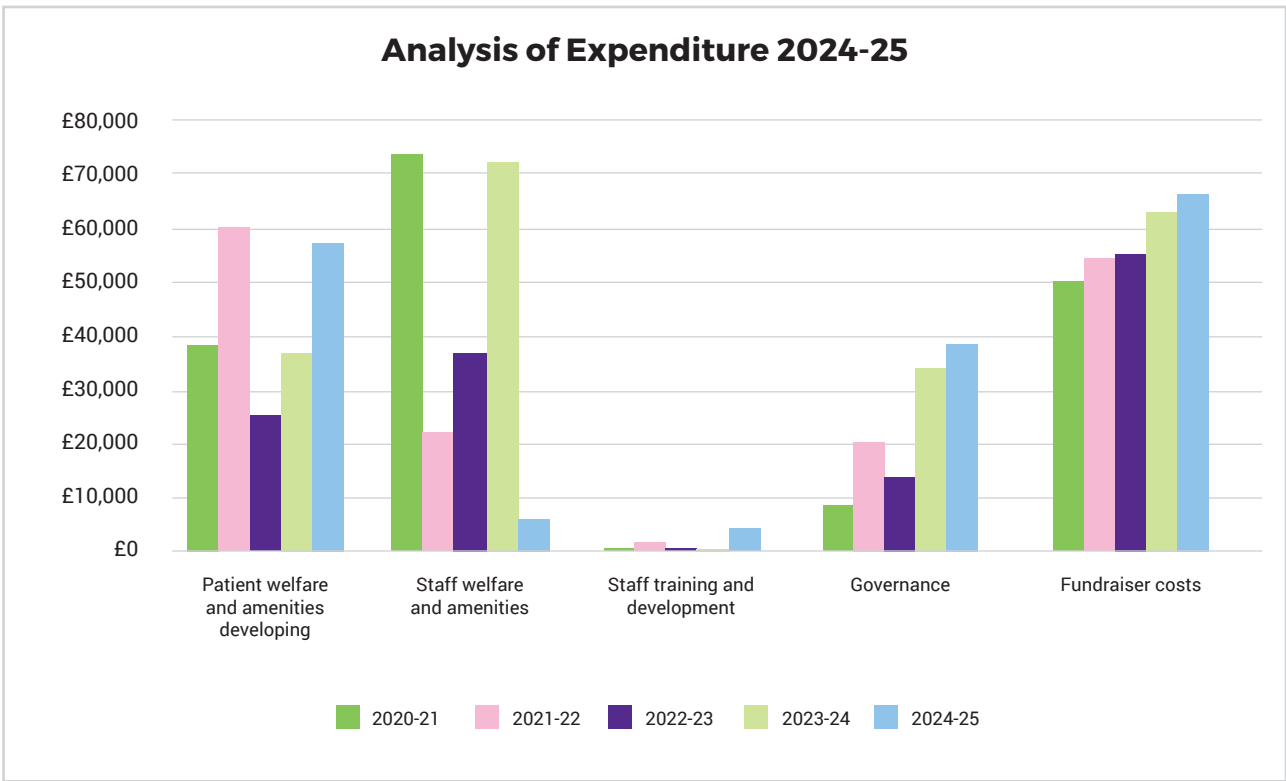


# Expenditure for the year ending 31 March 2025

During 2024/25, the Charity spent £68k on charitable activities supporting patients’ and staff welfare and amenities. Examples of this can be seen within the ‘How your donations and fundraising have helped this year’ section of this report.

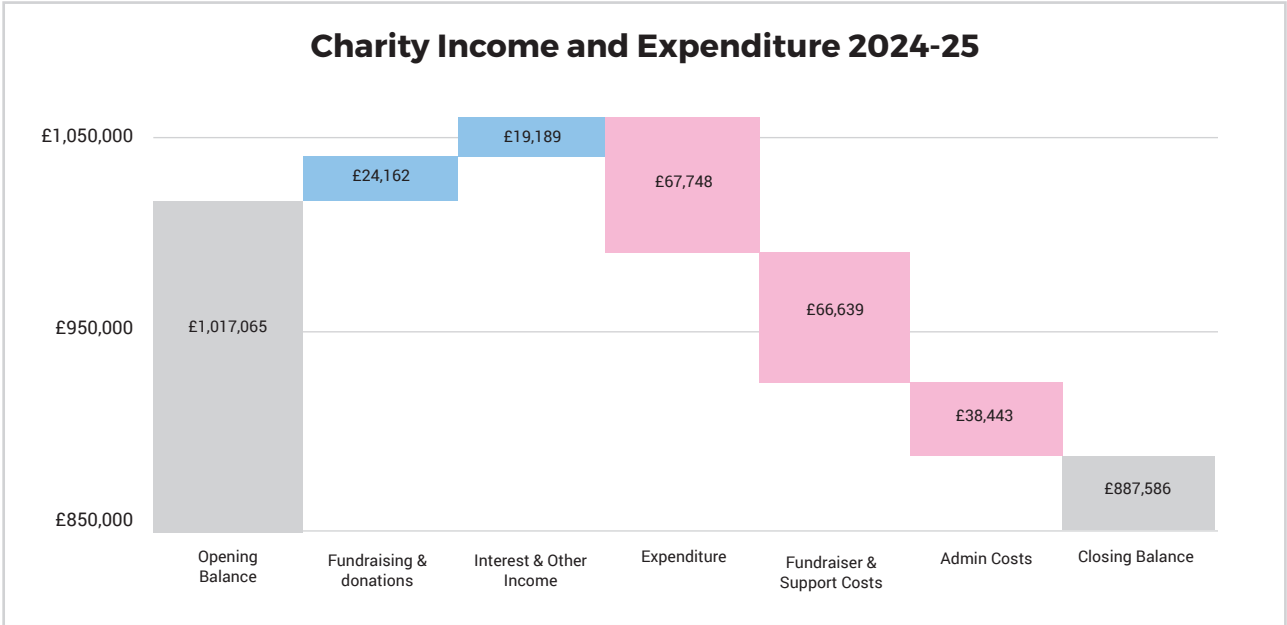
The Charity spent £105k on administration, governance and support costs including the Trust’s administrative charge for services provided, a contribution to the NHS Charities Together membership and audit fees.

The following chart details an analysis of expenditure between 2020/21 and 2024/25.



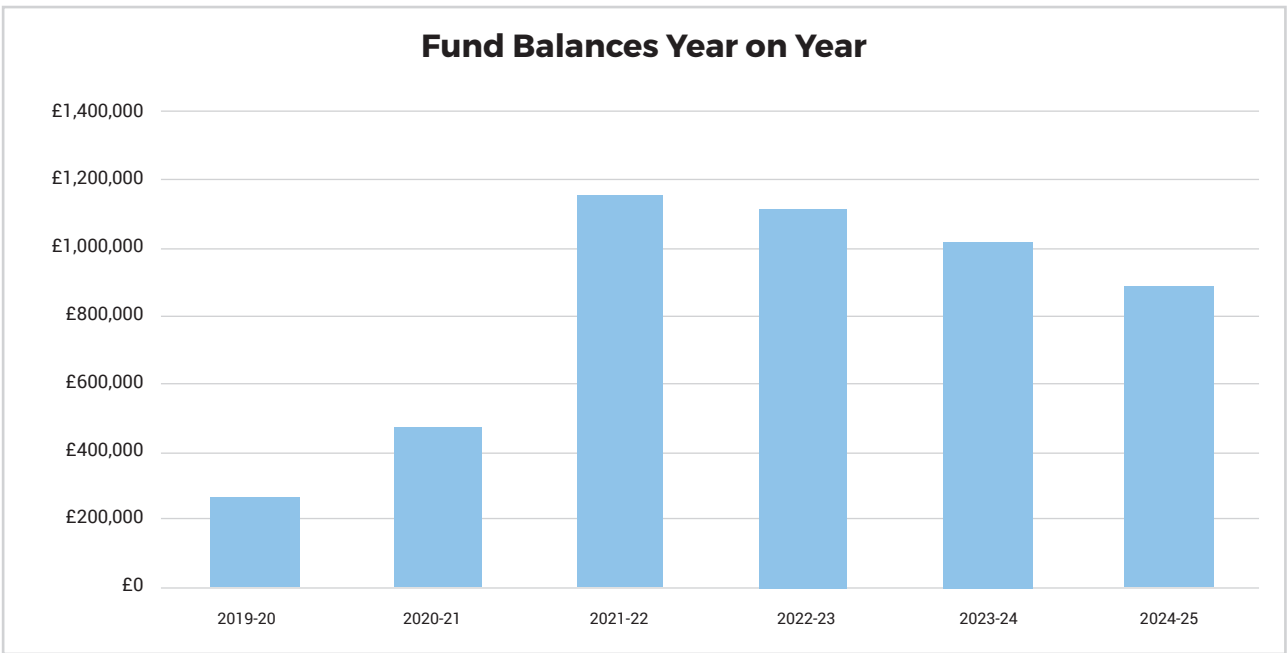
The Charity owed a balance of £40k (£204k in 2023/24) to the Devon Partnership NHS Trust for transactions undertaken through the Trust accounts payable function, including £4k for an independent examination fee at the end of the financial year.

The Charity’s overall income and expenditure for the year is displayed in the graph below:



## Charity fund balances

The Charity Fund balances at 31 March 2025 were £888k (£1.017m in 2023/24), a net decrease of £129k (£91k decrease in 2023/24) from the end of the 2024/25 financial year.



# Structure, governance and management of the charity

## History and organisation of Open Up

The charity, Devon Partnership NHS Trust Special Charity (registered charity no. 1056669), was established by Trust Deed on 25 June 1996 as the Exeter & District Community Health Service Charitable Funds. It became the Devon Primary Care Trust Charitable Fund and Other Related Charities in February 2009, and transferred to Devon Partnership NHS Trust in March 2013, when the Trust became the Corporate Trustee. The charity was renamed to its current registered name in April 2013.

In response to the COVID-19 pandemic, a working name - DPT Charity - was introduced in April 2020 to support emergency fundraising efforts. Following further development, the charity adopted Open Up as its registered working name in November 2024, reflecting its vision to innovate and enhance mental health, learning disability and neurodiversity care across Devon.

The charity includes several designated funds linked to specific wards, teams and services. These are managed by Fund Managers in line with agreed authorisation limits and the Standing Financial Instructions, Standing Orders and delegated authority of the Corporate Trustee. The Trustee may revise or merge funds within agreed thresholds.

Devon Partnership NHS Trust acts as the Corporate Trustee, with responsibilities shared between its Executive and Non-Executive Directors. Non-Executive Directors and the Chair are appointed by NHS England, and Executive Directors by the Trust Board.

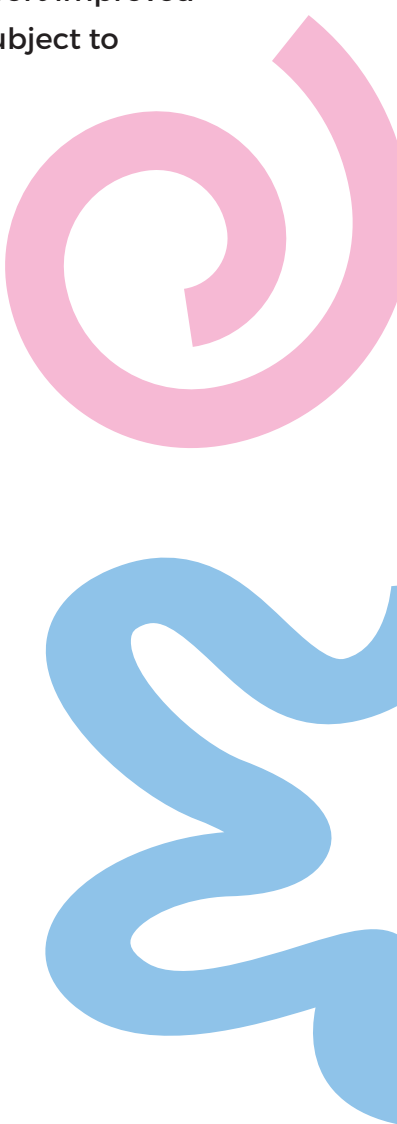
Day-to-day management of the charity is delegated by the Devon Partnership NHS Trust Board to the Charitable Funds Committee, which may also establish sub-committees, including a Fundraising Committee, as required. The Director of Corporate Affairs, as the Executive Lead for the charity, is responsible for overseeing administration, ensuring spending aligns with charitable objectives and priorities, maintaining accurate financial records, and upholding delegated governance arrangements.

The Charitable Funds Committee assures the Trust Board that funds are effectively managed, deployed and invested in line with legal and ethical standards. It oversees the stewardship of donations and grants, ensures alignment with the charity’s purpose, and reviews the charity’s Investment Strategy, ensuring all investments support improved health and care outcomes. Expenditure exceeding delegated limits is subject to Committee approval, in line with the Terms of Reference.

## Charitable Funds Committee

During the year ended 31 March 2025 the membership of the Charitable Funds Committee (CFC) was made up as follows:

Dr Venura Perera	Associate Non-Executive Director, CFC Chair
Tanya Barron	Non-Executive Director
Ian Turner	Non-Executive Director
Laura Hobbs	Director of Corporate Affairs



## Corporate Trustee

The Corporate Trustee for the DPT Charity is Devon Partnership NHS Trust.

The Non-Executive and Executive Directors who served Devon Partnership NHS Trust during the financial year ended 31 March 2025 were as follows:

Andy Willis	Chair, Non-Executive Director, third term agreed (ends on 28/02/26)
Phill Mantay	Acting Chief Executive/Chief Executive, acting Chief Executive role until July 2024 due to extended period of absence for substantive Chief Executive. Substantive appointment to Chief Executive June 2024.
Melanie Walker	Retired July 2024
Dr Sonja Manton	Director of Strategy and Partnerships. Appointed also as Deputy Chief Executive Officer in September 2024 on a tenured basis of three years.
Dr Fintan Larkin	Chief Medical Officer
Liz Perry	Chief People Officer
Chris Burford	Chief Nursing Officer and Allied Professions Lead, period of extended absence from August 2024
Aideen Tucker	Acting Chief Finance Officer, acting up role commenced continued to assist with interim Chief Executive arrangements and until substantive recruitment takes place
Taps Mutakati	Chief Operating Officer
Clare McAdam	Interim Chief Nursing Officer and Allied Professions Lead, Appointed Interim Chief Nursing Officer due to extended period of absence of substantive Chief Nursing Officer
Dr Jason Fee	Medical Director for South West Provider Collaborative
Dr Colm Owens	Medical Director for Devon Mental Health, Learning Disability and Neurodiversity Provider Collaborative
Laura Hobbs	Director of Corporate Affairs
Anne Forbes	Director for South West Provider Collaborative
Jacque Mowbray-Gould	Director for Mental Health, Learning Disability and Neurodiversity (MHLDN) Provider Collaborative
Tanya Barron	Non-Executive Director
Ian Turner	Non-Executive Director
Martin Beaman	Associate Non-Executive Director, final term concluded 30 June 2024
Simon Hamilton	Non-Executive Director
Dr Venura Perera	Honorary Non-Executive Director (NED), Honorary NED term concluded once appointed as Associate NED on 1 July 2024
Miriam Maddison	Non-Executive Director
Dinah Cox	Non-Executive Director, resigned from Trust 6 May 2024

## Relationships with related parties/external bodies

Open Up is proud to be a registered member of NHS Charities Together, the Fundraising Regulator, and the Healthcare Financial Management Association, ensuring we operate to the highest standards of transparency, governance and financial accountability.

The Charitable Funds Committee and Corporate Trustee roles are held by members of the Trust Board of Devon Partnership NHS Trust. While these individuals have responsibilities relating to both exchequer and charitable funds, the business of Open Up is managed and recorded separately from NHS Trust finances to ensure clarity and compliance.

At the start of each Charitable Funds Committee and Trust Board meeting, all members are required to declare any personal interests. These declarations are a matter of public record and can be accessed by request through Devon Partnership NHS Trust or via the Trust's website [www.dpt.nhs.uk/publications](http://www.dpt.nhs.uk/publications).

No payments, expenses, honoraria or emoluments were made from charitable funds during the year to any member of Devon Partnership NHS Trust or the Charitable Funds Committee.

## Trustee induction and training

All members of the Charitable Funds Committee are supported in their role through access to external training opportunities and are guided by best practice resources, including those published by the Healthcare Financial Management Association. Committee members also receive regular updates on charitable funds management and fundraising policy through scheduled meetings and can seek professional advice where appropriate.

Induction training is made available to all new Executive and Non-Executive Directors in their capacity as Board members of the Corporate Trustee of Open Up. This includes a comprehensive introduction to the objectives, scope, and policies of Open Up's charitable work, as well as broader training relating to the governance and administration of NHS charitable funds.

# Investment Policy and Performance

The Charity’s investment powers are broad but subject to a restriction that no speculative or hazardous investments, specifically futures or traded options, are allowed.

The Charity reviews its investment decisions annually. Currently the approach is risk averse and includes placing monies on deposit for one year.

# Reserves Policy

The Corporate Trustee calculates the reserves as that part of the Charity’s unrestricted income funds that is freely available after taking account of designated funds that have been earmarked for specific projects.

Unrestricted reserves on the 31 March 2025	
currently stand at	£837k
Less designated funds	(£190k)
<b>Total free reserves</b>	<b>£647k</b>

The Corporate Trustee regularly reviews balances held in designated funds. Where it is decided that the designation is no longer necessary or the fund has been inactive for a significant period of time, the funds are closed and transferred to reserves.

The trustees have no material recurring commitments for which it would be prudent to hold reserves against uncertainties.

# Grant Making Policy

The Charity has issued restricted grants previously. Where relevant these are disclosed under ‘Relationships with Related Parties/ External Bodies’ section. The Charity has not paid any grants during 2024/25.

## Risk Management Policy

The Corporate Trustee Risk Management Policy is detailed in its R03 Risk Management Framework. This Framework details the process to be used in identifying risks and controls, assessing risks and evaluating the actions required. This information is consolidated onto a Risk Register.

The major risks, to which the Charity is exposed to have been reviewed and systems have been established to mitigate those risks. The Charitable Funds Committee on behalf of the Trustee has established review processes to review, monitor and mitigate these risks.



# Charity details

## Open Up

Wonford House  
Dryden Road  
Exeter, EX2 5AF

**Email:** [dpt.openup@nhs.net](mailto:dpt.openup@nhs.net)

**Registration number:** 1056669

## Finance Team

Amanda Woodward – Capital and Charitable Funds Accountant  
Melinda Moore – Assistant Accountant

## Fundraising Team

Daniel Robson – Head of Charity Fundraising

## Bankers

Barclays Bank PLC  
3 Bedford Street  
Exeter, EX4 3LL

## Independent Examiners

Bishop Fleming Audit Ltd  
Salt Quay House  
4 North East Quay  
Sutton Harbour  
Plymouth, PL4 0BN

You can view a copy of our Special Charity Annual Report 2024/25 at **[www.dpt.nhs.uk](http://www.dpt.nhs.uk)** If you would like a hard copy, please call **01626 884544**.

If you require this report in a different format or language please ask a member of our staff. If you would like to provide feedback about our service please contact:

Patient Advice and Liaison Service (PALS)  
Devon Partnership NHS Trust  
Wonford House  
Dryden Road  
Exeter, EX2 5AF

**Tel:** 01392 675 686

**Email:** [dpt.pals@nhs.net](mailto:dpt.pals@nhs.net)

**Devon Partnership NHS Trust**  
**Special Charity**

**Trading as: Open Up**

**Unaudited Trustee's Report and Financial Statements for the Year**  
**Ended**  
**31 March 2025**

**Registered Charity 1056669**

## **OPEN UP (DEVON PARTNERSHIP NHS TRUST SPECIAL CHARITY)**

### **FUNDS HELD ON TRUST**

#### **ANNUAL ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2025**

The following accounts have been prepared in accordance with the requirements of the Charities Act 2011, the Charities (Accounts and Reports) Regulations 2008 and the Charities SORP (revised 2019).

### **STATUTORY BACKGROUND**

Devon Partnership NHS Trust is the Corporate Trustee of the funds held on trust under paragraph 16c of Schedule 2 of the NHS and Community Care Act 1990.

Open Up, the working name of Devon Partnership NHS Trust Special Charity, is registered with the Charity Commission (1056669).

### **MAIN PURPOSE OF THE FUNDS HELD ON TRUST**

The main purpose of the charitable funds held on trust is for use on any charitable purpose relating to the National Health Service wholly or mainly for the services provided by the Devon Partnership NHS Trust.

### **STATEMENT OF TRUSTEE RESPONSIBILITIES**

The Corporate Trustee (Trustee) is responsible for preparing the Trustees' Annual Report and Accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare an annual report and accounts for each financial year which give a true and fair view of the state of affairs of the Charity and of the incoming resources and application of resources of the Charity for that period.

In preparing these financial statements, the Corporate Trustee is required to:

- Select suitable accounting policies and then apply them consistently;
- Make judgments and estimates that are reasonable and prudent;
- Observe the methods and principles in the Charities SORP;
- State whether applicable UK Accounting Standards (FRS 102) have been followed, subject to any material departure, disclosed and explained in the financial statements; and
- State whether the financial statements comply with the trust deed, 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 Charity will continue in business.

The Corporate Trustee is required to act in accordance with the trust deed and the rules of the Charity, within the framework of trust law.

The Corporate Trustee is responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008. They are also responsible for safeguarding the assets of their Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Corporate Trustee has complied with their duty in accordance with the Charities Act and the Charity Commission's guidance on public benefit in exercising their powers and duties to consider it in all aspects of the Charity's activities.

The Corporate Trustee confirms that they have met the responsibilities set out above and complied with the requirements for preparing the accounts. The financial statements set out on pages **4 to 12** attached have been compiled from, and are in accordance with, the financial records maintained by the Trust.

Signed on behalf of the Corporate Trustee

#### **Trustee**

**Aideen Tucker**  
**Acting Chief Finance Officer**  
**Date: 19 September 2025**



#### **Trustee**

**Venura Perera**  
**Non Executive Director and Chair**  
**Date: 19 September 2025**



The Charitable Fund committee have delegated authority to approve the accounts on behalf of the Trust Board

## **INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF DEVON PARTNERSHIP NHS TRUST SPECIAL CHARITY (THE 'CHARITY')**

I report to the Charity Trustees on my examination of the accounts of Devon Partnership NHS Trust Special Charity (the Charity) for the year ended 31 March 2025.

### **RESPONSIBILITIES AND BASIS OF REPORT**

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the 2011 Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

### **INDEPENDENT EXAMINER'S STATEMENT**

Your attention is drawn to the fact that the Charity has prepared the accounts in accordance with 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) in preference to the Accounting and Reporting by Charities: Statement of Recommended Practice issued on 1 April 2005 which is referred to in the extant regulations but has been withdrawn.

I understand that this has been done in order for the accounts to provide a true and fair view in accordance with the Generally Accepted Accounting Practice effective for reporting periods beginning on or after 1 January 2015.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the 2011 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

*Bishop Fleming Audit Limited*

Charles Martin FCA  
Bishop Fleming Audit Limited  
Chartered Accountants  
Salt Quay House  
4 North East Quay  
Sutton Harbour  
PL4 0BN

Date: 19 September 2025

Open Up (Devon Partnership NHS Trust Special Charity)

Statement of Financial Activities as at 31 March 2025

	Note	Unrestricted Funds £000	Restricted Funds £000	Total Funds 2025 £000	Total Funds 2024 £000
<b>Income from:</b>					
Grants, donations and other trading activities	2	15	9	24	10
Charitable Activities	3	-	-	-	61
Investment Income	4	18	1	19	45
<b>Total incoming resources</b>		<b>33</b>	<b>10</b>	<b>43</b>	<b>116</b>
<b>Expenditure on:</b>					
Generating Funds		(63)	(4)	(67)	(63)
<b>Charitable Activities:</b>					
Governance and Administration Costs		(14)	(24)	(38)	(34)
Patient welfare and amenities		(52)	(6)	(57)	(37)
Staff training and development		(0)	(4)	(4)	-
Staff welfare and amenities		(6)	-	(6)	(72)
<b>Sub-total charitable activities</b>	5	<b>(71)</b>	<b>(35)</b>	<b>(106)</b>	<b>(144)</b>
<b>Total expenditure</b>		<b>(134)</b>	<b>(38)</b>	<b>(172)</b>	<b>(207)</b>
<b>Net Expenditure</b>		<b>(101)</b>	<b>(28)</b>	<b>(129)</b>	<b>(91)</b>
Transfer between funds		3	(3)	-	-
<b>Net movement in funds</b>		<b>(97)</b>	<b>(31)</b>	<b>(129)</b>	<b>(91)</b>
<b>Reconciliation of Funds:</b>					
Total funds brought forward		935	82	1,017	1,108
<b>Total funds carried forward</b>	10 & 11	<b>838</b>	<b>50</b>	<b>888</b>	<b>1,017</b>

The Statement of Financial Activities includes all gains and losses recognised in year

Notes on pages 7 to 12 form part of these accounts.

# Open Up (Devon Partnership NHS Trust Special Charity)

## Balance Sheet as at 31 March 2025

	Note	Unrestricted Funds 2025 £000	Restricted Funds 2025 £000	Total Funds 2025 £000	Total Funds 2024 £000
<b>Current Assets</b>					
Debtors	7	-	-	-	34
Cash and cash equivalents	8	882	50	932	1,191
<b>Total Current Assets</b>		<b>882</b>	<b>50</b>	<b>932</b>	<b>1,225</b>
<b>Current Liabilities</b>					
Creditors falling due within one year	9	(44)	-	(44)	(208)
<b>Total Net Assets</b>		<b>838</b>	<b>50</b>	<b>888</b>	<b>1,017</b>
<b>Funds of the Charity</b>					
Unrestricted income funds	10	838	-	838	935
Restricted income funds	11	-	50	50	82
<b>Total Funds</b>		<b>838</b>	<b>50</b>	<b>888</b>	<b>1,017</b>

The financial statements were approved and authorised for issue by the Trustees and signed on their behalf by:



Venura Perera - Trustee

Date: 19 September 2025

Notes on pages 7 to 12 form part of these accounts.

**Open Up (Devon Partnership NHS Trust Special Charity)**

**Statement of Cash Flows for the year ended 31 March 2025**

	Note	<b>Total Funds 2025 £000</b>	<b>Total Funds 2024 £000</b>
<b>Cash flows from operating activities:</b>			
Net expenditure for the year		(129)	(91)
(Decrease) / increase in creditors		(164)	203
Decrease in debtors		34	301
<b>Net cash (used in) / provided by operating activities</b>		<b>(259)</b>	<b>413</b>
 <b>Change in cash and cash equivalents in the reporting period</b>		 (259)	 413
<i>Cash and cash equivalents at the beginning of the reporting period</i>		<i>1,191</i>	<i>778</i>
<b>Cash and cash equivalents at the end of the reporting period</b>	<b>8</b>	<b>932</b>	<b>1,191</b>

**Notes to the Financial Statements**

**1. Accounting Policies**

**(a) Basis of preparation**

The financial statements have been prepared on a going concern basis under the historical cost convention, with the exception of investments which are included at fair value.

The accounts (financial statements) have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued in October 2019 and the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011 and UK Generally Accepted Practice as it applies from 1 January 2019.

The accounts (financial statements) have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued in October 2019, rather than the Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The trustee considers that there are no material uncertainties about Devon Partnership NHS Trust Special Charity's ability to continue as a going concern. Fundraising income is almost back to pre-pandemic levels but continues to be impacted by the cost of living crisis however with the level of funds available and ongoing commitments, this does not impact the charity's ability to continue as a going concern.

**(b) Funds structure**

Where there is a legal restriction on the purpose to which a fund may be put, the fund is classified as a restricted fund.

Restricted funds are those where the donor has provided for the donation to be spent in furtherance of a specified charitable purpose. The costs of raising and administering such funds are charged against the specific fund. DPTSC has three restricted funds which the aim and use of each restricted fund are explained at note 11.

Designated funds comprise unrestricted funds that have been set aside by the Trustees for particular purposes. The aim and use of each designated fund is set out in note 11.

**(c) Incoming resources**

All incoming resources are included in the Statement of Financial Activities as soon as all three of the

- i) Entitlement - arises when a particular resource is receivable, or the charity's right becomes legally
- ii) Certainty - when there is a reasonable certainty that the incoming resources will be received and that the charity is legally entitled to the income; and
- iii) Measurement – when the monetary value of the incoming resources can be measured with

Where there are terms or conditions attached to incoming resources, particularly grants, then these terms or conditions must be met before the income is recognised as the entitlement condition will not be satisfied until that point. Where terms or conditions have not been met or uncertainty exists as to whether they can be met then the relevant income is not recognised in the year but deferred and shown on the balance sheet

**(d) Gifts in Kind**

Gifts in kind, such as food and care packages are not accounted for when they are accepted and immediately distributed unless a single donation is material. Gifts of tangible assets are recognised as a donation at fair value (market price) on receipt and charitable expenditure when they are distributed. Where gifts in kind are held before being distributed to beneficiaries, they are recognised at fair value as stock until they are distributed.

**Notes to the Financial Statements**

**1 Accounting Policies (continued)**

**(e) Resources expended and irrecoverable VAT**

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to each category of expenses. All expenditure is recognised once there is a legal or constructive obligation resulting from a past event, it is more likely than not that a transfer of benefits will be required in settlement and the amount of the obligation can be measured or estimated reliably. Irrecoverable VAT is charged against the category of resources expended for which it was incurred.

**(f) Recognition of liabilities for grants payable**

Grants payable are payments made to, related parties or third party NHS bodies and non NHS bodies in furtherance of the charitable objectives of the funds held on trust. The grants are accounted for on an accruals basis where the conditions for their payment have been met or where the recipient has a reasonable expectation that they will receive a grant. Provisions are made where approval has been given by the Trustee, due to the approval representing a firm intention, which is communicated to the recipient.

**(g) Allocation of overhead and support costs**

Overhead and support costs are costs which do not relate directly to a single activity. These include some staff costs, costs of administration, external audit costs and membership of NHS Charities Together. Support costs have been allocated between Charitable Activities and Governance costs. Costs that are not wholly attributable to an expenditure category have been apportioned. The analysis of overhead and support costs and the bases of apportionment applied are shown in Note 5. Where costs are shared by two or more charitable activities, support costs have been apportioned between categories.

**(h) Costs of generating funds**

The costs of generating funds are those costs attributable to generating income for the charity, other than those costs incurred in undertaking charitable activities or the costs involved in undertaking trading activities in furtherance of the charity's objects, and represent investment management fees.

**(i) Charitable activities**

Costs of charitable activities comprise all costs identified as wholly or mainly incurred in the pursuit of the charitable objects of the charity. These costs, where not wholly attributable, are apportioned between the categories of charitable expenditure in addition to the direct costs. The total costs of each category of charitable expenditure therefore include support costs and an apportionment of overheads, as shown in Note 4.

**(j) Governance costs**

Governance costs comprise all costs identifiable as wholly or mainly attributable to ensuring the public accountability of the charity and its compliance with regulation and good practice. These costs include costs related to its audit together with an apportionment of overhead and support costs.

**(k) Staff and Pensions**

The charity has no employees in the year; however it is supported by a fundraiser who is employed by Devon Partnership NHS Trust and fully seconded to the charity. The total salary costs are recharged by the Trust in their entirety.

**(l) Cash and Cash Equivalents**

Cash at bank and in hand is held to meet the day to day running costs of the charity as they fall due. Cash equivalents are short term, highly liquid investments, usually in 90-day notice interest bearing savings accounts.

**(m) Creditors**

Creditors are amounts owed by the charity. They are measured at the amount that the charity expects to have to pay to settle the debt. Amounts which are owed in more than a year are shown as long-term creditors.

**(n) Debtors**

Debtors are amounts owed to the charity. They are measured on the basis of their recoverable amount.

Notes to the Financial Statements

2 Analysis of Income from Grants, Donations and Other Trading Activities

	Unrestricted funds £000	Restricted funds £000	Total 2025 £000	Total 2024 £000
Grants	-	-	-	(6)
Donations	1	-	1	3
Other Trading Activities including Fundraising	14	9	23	13
<b>Total</b>	<b>15</b>	<b>9</b>	<b>24</b>	<b>10</b>

Donations include donations from members of the public, staff members, relatives of staff and patients and other organisations.  
Grants - none received or returned this year. The financial year 2023-24 includes the return of the Franklyn Orchard and Norman Family funds.

3 Analysis of Income from Charitable Activities

	Unrestricted funds £000	Restricted funds £000	Total 2025 £000	Total 2024 £000
Stage 3 Grant from NHS Charities Together - Wellbeing	-	-	-	61
<b>Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>61</b>

4 Analysis of Income from Investments

	Unrestricted funds £000	Restricted funds £000	Total 2025 £000	Total 2024 £000
Investment income	18	1	19	45
<b>Total</b>	<b>18</b>	<b>1</b>	<b>19</b>	<b>45</b>

5 Analysis of Charitable Expenditure

	Fundraising Support £000	Governance Costs £000	Charitable Activities £000	Total 2025 £000	Total 2024 £000
Governance and Administration	67	38	-	105	97
Patient welfare and amenities	-	-	57	57	37
Staff training and development	-	-	4	4	-
Staff welfare and amenities	-	-	6	6	72
<b>Total</b>	<b>67</b>	<b>38</b>	<b>67</b>	<b>172</b>	<b>207</b>

Financial administration, membership fees and the Independent Examination fee have been wholly allocated to governance costs  
Governance and Administration includes all support costs

**Notes to the Financial Statements**

**6 Independent Examiner's remuneration**

The Independent Examiner's remuneration for 2025 is £3,600 incl VAT (£3,600 in 2024). The fee relates solely to the independent examination with no additional work undertaken.

**7 Debtors**

	<b>2025</b>	<b>2024</b>
	<b>£000</b>	<b>£000</b>
<b>Amounts falling due within one year</b>		
Debtor	-	34
<b>Total</b>	<b>-</b>	<b>34</b>

The debtor in 2024 related to bank interest due on the investment made at the beginning of the 2023-24 financial year which matured in April 2024.

**8 Cash and cash equivalents**

	<b>2025</b>	<b>2024</b>
	<b>£000</b>	<b>£000</b>
<b>Analysis of cash at bank on current investments held on deposit</b>		
Barclays Bank Business Premium Account	922	416
Barclays Bank Current Account	10	25
Barclays investment	-	750
<b>Total</b>	<b>932</b>	<b>1,191</b>

Barclays Business Premium Account is an interest bearing account with an automatic sweep taking place to transfer income above £10,000 from the Current Account. No current asset investments are held outside the UK. All assets are held in cash.

**9 Creditors**

	<b>2025</b>	<b>2024</b>
	<b>£000</b>	<b>£000</b>
<b>Amounts falling due within one year</b>		
Other creditors	40	204
Accruals	4	4
<b>Total</b>	<b>44</b>	<b>208</b>

Other creditors include the amount owed to Devon Partnership NHS Trust at the end of the financial year for transactions settled through the Trust's accounts payable function.

Notes to the Financial Statements

10 Analysis of Earmarked Designated and Unrestricted funds

	Balance at 01 April 2024 £000	Incoming resources £000	Resources expended £000	Funds transferred £000	Balance at 31 March 2025 £000
<b>Current Year</b>					
Torbay Services Fund	202	4	(17)	(4)	185
Other unrestricted funds	733	29	(118)	7	652
	<u>935</u>	<u>33</u>	<u>(135)</u>	<u>3</u>	<u>837</u>
<b>Prior Year</b>					
	Balance at 01 April 2023 £000	Incoming resources £000	Resources expended £000	Funds transferred £000	Balance at 31 March 2024 £000
Little Something Fund	56	-	-	(56)	-
Torbay Services Fund	209	9	(16)	-	202
Other unrestricted funds	807	43	(117)	-	733
	<u>1,072</u>	<u>52</u>	<u>(133)</u>	<u>(56)</u>	<u>935</u>

Little Something fund was re-categorised from designated fund to a restricted income fund during 2023-24.

The Corporate Trustee set a closing balance of £15,000 or above as the threshold for separate reporting of material designated earmarked funds.

The designated earmarked funds listed are those with closing balances in excess of £15,000 as at 31 March 2025. The objectives of each of the designated funds shown above are as follows:

Torbay Services Fund is designated for the benefit of Mental Health services within the Torbay area.

11 Restricted Income funds

	Balance at 01 April 2024 £000	Incoming resources £000	Resources expended £000	Funds transferred £000	Balance at 31 March 2025 £000
<b>Current Year</b>					
Gavin Falkner Memorial Fund	1	-	-	-	1
Charity Development grant	26	-	(24)	(2)	0
Little Something Fund	55	8	(14)	(1)	48
Coombehaven Gym	-	2	-	-	2
	<u>82</u>	<u>10</u>	<u>(38)</u>	<u>(3)</u>	<u>50</u>
<b>Prior Year</b>					
	Balance at 01 April 2023 £000	Incoming resources £000	Resources expended £000	Funds transferred £000	Balance at 31 March 2024 £000
Gavin Falkner Memorial Fund	1	-	-	-	1
Charity Development grant	35	-	(9)	-	26
Little Something Fund	-	3	(4)	56	55
	<u>36</u>	<u>3</u>	<u>(13)</u>	<u>56</u>	<u>82</u>

The Gavin Falkner Memorial Fund is for the relief of family or friends left behind following a drug-related death and who are in need of financial assistance.

The Charity development grant is a sum provided by NHS Charities Together. The Charity has opted to use this money to improve operations, communications, marketing and branding, and learning and evaluation.

Little Something Fund is for the support the recovery of woman and their families affected by perinatal mental health.

The Coombehaven Gym Fund has been set up to fund gym equipment for patients.

**Open Up (Devon Partnership NHS Trust Special Charity)**  
**Year ended 31 March 2025**

**Notes to the Financial Statements**

**12 Controlling Party**

The Corporate Trustee for the Charity are the Board Members of Devon Partnership NHS Trust. No individual member has ultimate control.

**13 Related party transactions**

During the year certain members of the Charitable Funds Committee, which is empowered by the Corporate Trustee to act on its behalf in the day to day administration of all funds held on trust, were also members of the Devon Partnership NHS Trust.

The Charity has made payments of £336k to the Trust during the year (£0k in 2023/24). At the year end, a balance of £40k (£204k in 2023/24) was outstanding to the Trust at the balance sheet date. This amount has been included in other creditors.

The Charitable Funds Committee and Corporate Trustee are made up of Trust Board Directors (Executive and non-Executive) of Devon Partnership NHS Trust. The business of the charity is dealt with separately from that associated with exchequer funds, for which Trust Board members are also responsible. Declarations of personal interest are made, where appropriate, and those declarations pertaining to the funds held on Trust are available for public inspection by application through Devon Partnership NHS Trust.

The Devon Partnership NHS Trust Special Charity did not pay expenses during the year to any member of the Devon Partnership NHS Trust Board or to any member of the Charitable Funds Committee and members did not receive any honoraria or emoluments from charitable funds in the year.

Devon Partnership NHS Trust Special Charity  
Wonford House Hospital  
Dryden Road  
Exeter  
EX2 5AF

Bishop Fleming Audit Limited  
Salt Quay House  
4 North East Quay  
Sutton Harbour  
Plymouth  
PL4 0BN

Telephone: 01392 208866  
[www.dpt.nhs.uk](http://www.dpt.nhs.uk)

Date: 19 September 2025

Dear Sirs

## **Open Up's Financial Statements for the year ended 31 March 2025**

The following representations are made on the basis of enquiries of management and staff with relevant knowledge and experience such as we consider necessary in connection with your independent examination of the charity's financial statements for the year ended 31 March 2025. These enquiries have included inspection of supporting documentation, where appropriate, and are sufficient to satisfy ourselves that we can make each of the following representations. All representations are made to the best of our knowledge and belief.

### **1. General**

We acknowledge that the work performed by you is substantially less in scope than an audit performed in accordance with International Standards on Auditing (UK) and that you do not express an audit opinion.

We confirm that the Charity was entitled to exemption under section 144 of the Charities Act 2011 the requirement to have its financial statements for the financial year ended 31 March 2025 audited.

We have fulfilled our responsibilities as Trustees, as set out in the terms of your engagement letter dated 23 May 2024 under the Charities Act 2011, for preparing financial statements in accordance with applicable law and United Kingdom Accounting Standards (UK Generally Accepted Accounting Practice), for being satisfied that they give a true and fair view and for making accurate representations to you.

All the transactions undertaken by the Charity have been properly reflected and recorded in the accounting records.

All the accounting records have been made available to you for the purpose of your independent examination. We have provided you with unrestricted access to all appropriate persons within the Charity, and with all other records and related information requested, including minutes of all management and Trustee meetings and correspondence with the Charity Commission.

The financial statements are free of material misstatements, including omissions.

## **2. Assets and liabilities**

The Charity has satisfactory title to all assets and there are no liens or encumbrances on the Charity's assets, except for those that are disclosed in the notes to the financial statements. All actual liabilities, contingent liabilities and guarantees given to third parties have been recorded or disclosed as appropriate.

We have no plans or intentions that may materially alter the carrying value and, where relevant, the fair value measurements or classification of assets and liabilities reflected in the financial statements.

## **3. Accounting estimates**

The methods, data and significant assumptions used by us in making accounting estimates, and their related disclosures, are appropriate to achieve recognition, measurement and disclosure that is reasonable in the context of the applicable financial reporting framework.

## **4. Legal claims**

We have disclosed to you all claims in connection with litigation that have been, or are expected to be, received and such matters, as appropriate, have been properly accounted for and disclosed in the financial statements.

## **5. Laws and regulations**

We have disclosed to you all known instances of non-compliance or suspected non-compliance with laws and regulations whose effects should be considered when preparing the financial statements.

## **6. Related parties**

Related party relationships and transactions have been appropriately accounted for and disclosed in the financial statements. We have disclosed to you all relevant information concerning such relationships and transactions and are not aware of any other matters which require disclosure in order to comply with regulatory, legislative and accounting standard requirements.

## **7. Subsequent events**

All events subsequent to the date of the financial statements which require adjustment or disclosure have been properly accounted for and disclosed.

## **8. Going concern**

We believe that the Charity's financial statements should be prepared on a going concern basis on the grounds that current and future sources of funding or support will be more than adequate for the Charity's needs. We also confirm our plans for future action(s) required to enable the Charity to continue as a going concern are feasible. We have considered a period of twelve months from the date of approval of the financial statements. We believe that no further disclosures relating to the Charity's ability to continue as a going concern need to be made in the financial statements.

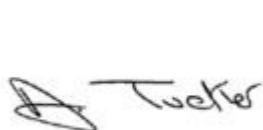
## 9. Grants and donations

All grants, donations and other income, the receipt of which is subject to specific terms or conditions, have been notified to you. There have been no breaches of terms or conditions in the application of such income.

Details of restricted grants and donations are as follows:

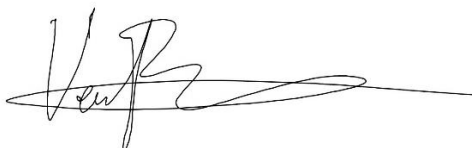
- Little Something Fund - £8,000
- Coombehaven Gym - £2,000

Yours faithfully



Aideen Tucker  
Chief Finance Officer

Signed on behalf of the Corporate Trustee



Venura Perera  
Associate Non-Executive Director

16 September 2025