

**THE COMPASSIONATE FRIENDS**  
**TRUSTEES' ANNUAL REPORT**  
**AND FINANCIAL STATEMENTS**  
**31 MARCH 2023**

**Company Registration Number 04029535**  
**Charity Number 1082335**



The  
**Compassionate  
Friends**

**Supporting bereaved parents and their families**

# THE COMPASSIONATE FRIENDS

## FINANCIAL STATEMENTS

YEAR ENDED 31 MARCH 2023

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# **THE COMPASSIONATE FRIENDS**

## **TRUSTEES' ANNUAL REPORT**

**YEAR ENDED 31 MARCH 2023**

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### **Introduction**

The Compassionate Friends was established in 1969 as a national charitable organisation supporting bereaved parents, siblings and grandparents after the death of a child of any age and from any cause.

The Trustees of The Compassionate Friends ("TCF") present their annual report for the year ending 31 March 2023.

This Report has been prepared in accordance with the charity's governing document and Statement of Recommended Practice (FRS102 2019) "Accounting and Reporting by Charities", published by the Charity Commission.

Our legal status and governance structure are explained in the "Structure, Governance and Management" section of this report.

### **Our Objectives**

TCF is a registered charity and its purposes as set out in the objects contained in our Memorandum and Articles:

- (i) To advance and assist in mental and physical welfare following suffering and infirmity among (a) parents occasioned by the death of their child(ren) and (b) other close relatives of such child(ren), normally brothers, sisters and grandparents;
- (ii) To promote and support research on parental and sibling grief intended to help to change and improve the quality of support and care provided by health, social care, political and other - supporters for grieving parents and siblings.

### **Our Mission**

The Compassionate Friends aims to make a difference by providing support, understanding and hope to bereaved parents, siblings and grandparents who have experienced the death of a child or children of any age (over one month old to an adult son or daughter) and from any cause.

We do this by offering accessible, high quality peer support services and information to bereaved parents and their families.

### **Our Vision**

Every bereaved parent, adult sibling and grandparent throughout the UK can find and access the lifeline of high quality, appropriate and safe peer support services.

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#### How our work delivers Public Benefit

*“Every parent’s nightmare is to lose a child”*

This is a cliché, but for many, many families the nightmare tragically becomes a reality. Each year in the UK 9,000 (Office of National Statistics) children and young people under the age of 30 years die – and this figure does not include the adults (87,000 in 2019) who die at the age of 30 or over, many of whom not only leave behind a partner and children but grieving parents, who have tragically outlived their son or daughter.

It is not an overstatement to say that the impact of child loss – whether sudden or anticipated – on parents and families is devastating. Grieving parents suffer a deep trauma and intense and often overwhelming pain following a loss that is so out of the natural order. Both the physical and emotional impact of the death of a child in the family is huge, intense, complex and often long-lasting. Parents’ ability to cope with child loss can be exacerbated by the lack of support services and appropriate information. Many professionals or family and friends are not aware of the enormity and long-lasting impact of child loss on an individual’s physical and mental health.

#### National peer-to-peer support for over 50 years

TCF is a charitable organisation of bereaved parents and their families providing support, understanding and hope to other bereaved parents, adult siblings and grandparents who have suffered the death of a child or children of any age (from one month old to an adult son or daughter) and from any cause of death - for instance as a result of road traffic incident, a short or longer term illness (for example, cancer), sudden unexpected death (for example through an accident or sudden illness), by suicide or through drug or alcohol use. We are the only UK nationwide charity offering this vital peer-to-peer support to parents and their families.

As the first peer-to-peer charity in the UK for grieving parents, we have been bringing understanding, support, friendship and hope to bereaved parents for over 50 years. The charity began in 1969 when grieving parents Iris and Joe Lawley, Bill and Joan Henderson and Betty Rattigan were brought together for mutual support by Simon Stephens, then a young chaplain in a Coventry hospital. Together they formed TCF. The peer to-peer support they offered each other as bereaved parents has remained at the heart of the charity since those first early days.

Many newly bereaved parents and other family members tell us that peer support can be more helpful to them than professional counselling, as only others who have suffered a similar loss can appreciate the trauma, depth and all-encompassing nature and impact of the death of a child. Grieving individuals are helped to feel understood, validated and more safely held in their grief. Speaking with others, and particularly others further along in their loss, means that the newly bereaved can ‘take off the mask’ they wear every day and thus can feel better able to share more openly and honestly about how they are feeling without the fear of being ‘moved on’ or otherwise made to feel they are failing or ‘stuck’ in their grief. Perhaps most important of all, bereaved parents and siblings are able to talk about their children or brothers and sisters without the fear or being ‘shut down’.



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### How our work delivers its aims

Our support for grieving parents and siblings is delivered throughout the UK by over 250 volunteers, who all know grief for a child or sibling first-hand. We offer training and support to develop our wonderful volunteers' competence and capacity to listen with empathy and offer validation and normalisation of the experiences and the complexity of emotions experienced by grieving individuals. Our small, but hardworking and committed staff team continues to provide support to all aspects of the charity – including fundraising, volunteer recruitment, onboarding, training, support and management, administration and finance.

Equal access to our support and inclusion is important to our charity. TCF is a secular organisation and offers support to bereaved families irrespective of the age of child (from a month old), cause of death, or ethnic, social, economic, faith or economic backgrounds. Our support is offered to any parent affected by the death of a child, including adoptive parents, blended and step-families, and same sex couples. We welcome bereaved parents and siblings where the death of a child has been very recent or a loss that happened many years ago.

### Three - year Strategic Plan - a focus on growth in a challenging environment

The period of this report covers **year 2 of a three - year Strategic Plan**. The plan was developed by the Trustees and CEO following a period of groundwork and preparation including a range of research projects, reviews, analysis and planning activities. The resulting Plan was designed to further the continued development of the charity. The strategic focus of the Plan was on **growth and increased reach** of our services and support for grieving parents and their families.

Year 2 of the Plan was implemented in the **challenging post-pandemic/lockdown environment** where just as family and friends were returning to a more 'normal' life bereaved parents and families were struggling to find any kind of normality again. This was particularly true of those bereaved of their child in late 2019 and during 2020 and after. Our volunteers were supporting parents who were experiencing an intensity and complexity to their grief which had been impacted by the lack of face to face opportunities as well as for those who have been unable to access the usual rituals after death such as a large funeral or memorial service. They were also unable to meet and be supported in person by family and friends or professional services and charities like TCF during the pandemic years. Although our services returned to in-person support on a more consistent basis in early 2022, we continued to offer the online (e.g. support groups online) and telephone and one-to-one support services (e.g. grief companions, helpline) which had been established and/or developed during the pandemic years – ultimately offering a hybrid model of support during the year.

The impact of the pandemic and the economic and political environments – including government turmoil in 2022, the cost-of-living crisis and a war in Europe from early 2023 - meant that the **fundraising environment for our charity** presented a greater challenge than had been envisaged, with more good causes chasing less available funds. Indeed, many funders were diverting funding away from bereavement support to cost of living causes. Although challenge and community fundraising events were beginning to return in person, there was still a reluctance among members and donors to gather together in large numbers

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at events and/or to ask for sponsorship during a year where costs of living were rising and the economic and political outlook was uncertain.

Our work supporting grieving parents and their families relies on the dedication and commitment of our wonderful 250 volunteers. We cannot do what we do without them. This year, however, our operating environment presented challenges for **volunteer recruitment and retention**. We were fortunate that very many of our dedicated volunteers continued their vital roles providing support and understanding to grieving families during the year. However, some found that they were unable to continue volunteering for our charity as they or family members were suffering from ill-health or they were needed elsewhere, for instance for other caring responsibilities. Indeed, some have found it a necessity to change their priorities post-pandemic – for instance turning more of their attention toward paid work to deal with rising inflation and other personal economic challenges. Difficulties with volunteer retention during this period was a trend reported by many organisations and we struggled, like many, to recruit new and retain some existing volunteers.

Despite the challenges presented by aspects of the environment outside of the our control, we continued to focus on delivering the Strategic Plan, albeit with some adjustments to take account of changed circumstances. Thus, we continued to focus on the two underpinning prerequisites set by Trustees to:

- i) Retain current, and further build upon, TCF's infrastructure
- ii) Ensure sufficient funds so strategic objectives can be met

#### **Delivering on our strategic pre-requisites. How did we do?**

Prerequisite goal 1) **Retaining and further build upon, TCF's infrastructure including volunteers, staffing and systems.**

For our volunteers and staff, being there for others can have an impact on their own well-being as it is not always possible for volunteers in supporting roles to protect themselves from others' stories of loss and grief, many of which can be traumatic, complex and very raw. As the reach of the charity grows and as bereaved family members are finding us at an earlier point in their grief – sometimes on the day of death or before the funeral – together with the effects of the pandemic/lockdowns on normal grieving rituals and support for the bereaved, have all contributed to volunteers' own grief and wellbeing being impacted at times. We therefore continued to **prioritise and focus on supporting and encouraging self-care and resilience for all our volunteers.**

To provide support for our volunteer team, our volunteer management team – Ruth Mercier, Shirley Gower and Sharon Rose - have facilitated **regular sharing sessions and volunteer meetings** online where volunteers can share the challenges and positives of their volunteering role, be supported by one another, stay connected, hear from speakers from both inside and outside of our charity and feel part of the wider volunteer and staff team. From January 2023, we also held monthly one hour 'volunteer drop in' sessions to enable volunteers to share and learn together, to understand more about the different support roles within our charity and to support one another with common challenges. These sessions are facilitated by TCF staff team members but very much led by our volunteers concerns and needs. All have been well attended and volunteers have told us they appreciate being able to support one another and

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that they feel less alone with the support they are offering by meeting together regularly with the wider volunteer team.

Our **Hear For You listening support service** continued to be available to all active TCF volunteers. This offered up to 3 x 50-minute confidential therapeutic sessions by one of two qualified counsellors, both bereaved parents with volunteering experience with TCF. The sessions are free of charge to individual volunteers and conducted online or by telephone. The service is available to all volunteers to talk about the impact and challenges around supporting others and for when they are perhaps feeling less resilient, either related to their volunteering role, own grief or personal lives or simply to talk confidentially with someone who understands their peer support role. During the year over 30 listening support sessions were taken up. We encourage all volunteers to have a regular annual session as a wellbeing check-up and all new volunteers to access a session after their first six months in a supporting role.

What our volunteers say *"I really appreciate the care TCF show for volunteers....Your care is very much appreciated and enables me to continue supporting others."*

We offered four free **resilience workshops** to all TCF volunteers during the autumn/winter of 2022/23. These were generously offered and sensitively presented by Ann Chalmers, bereaved parent and CEO of Child Bereavement UK. 120 volunteers were able to attend one of the four repeated workshops. Volunteers shared with us their appreciation of the reminder of how supporting vulnerable individuals can impact personally, as well as the importance of self-care, self-awareness and maintaining good boundaries to aid in volunteer resilience-building.

What our volunteers said *"I found the session thought-provoking. It gave me ideas to take away with me which I can usefully use as a volunteer to help me in my role. It made me think about my experience as a volunteer which isn't always an easy role as you are taking on people's pain and emotions. So it is positive to think about ways in which we can help ourselves, look after our own mental and physical health while supporting other people."*

Continuing our emphasis on self-care for volunteers, we engaged creative writing therapist, Sam Gray, to run three supportive writing workshops during October and November 2022. The theme was self-compassion and self-care through writing with the emphasis on hope and resilience. 36 volunteers took up these sessions, which were well received.

Overall, our volunteers have told us that they feel very supported and cared for by the staff team in their roles:

*"I've been volunteering for over 10 years now. I am really pleased that TCF support for volunteers has grown substantially in that time. Things now offered, like this workshop, the writing workshop and other self-care information are vital for mental wellbeing of volunteers. I know that in the early days of my volunteering roles these workshops would have been incredibly useful. So I am glad that newer volunteers can gain this support early on, it's brilliant."*

Our volunteer support benefitted hugely from the appointment of **volunteer and helpline assistant**, Jo Kitterick, in August 2022. This role includes responding to email requests to our helpline, ensuring information about our support is up to date, improvement and introduction



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of administration systems. Jo has quickly made a difference to the support we offer volunteers as well as to our callers and those who email us for support.

During the year, we began regular monthly meetings for our **volunteer management staff team** to share together, discuss ideas and suggestions, and find support on a regular basis. Many of the concerns and issues are common across all the teams of volunteers, in whatever way they are offering support to others – for instance, supporting volunteers with boundary issues when supporting others, managing dominance challenges at online or in-person support group meetings as well as issues with onboarding and training of volunteers. These and other matters are regularly discussed to ensure a consistent approach across the charity.

Our **staff** are also impacted by the nature of our work and in particular, are hearing stories of traumatic and complex loss every day. Our staff team list can be found here [www.tcf.org.uk/staff](http://www.tcf.org.uk/staff). A key focus of the year was staff retention and to ensure our growing dedicated and hardworking staff team felt well supported. We introduced additional **well-being support** during the year including mental health days, access to all the training and support opportunities available for volunteers and allocation of funds to support staff well-being activities and team building. A more formal appraisal and review system was put in place to celebrate staff achievements and develop competency and skills in staff team members. Our staff team meet together online to share information once a month. Towards the end of the year, we began research into partnering with outside HR support to ensure the charity is meeting its responsibilities to our employees and that we have helpful and supportive agreements and policies in place with our volunteers.

What our staff say:

*“There are so many positives to being part of the TCF staff and volunteer team...A very significant part of this positivity is linked to my relationships and interactions with all the staff team”.*

Further **infrastructure improvements** have made good progress during the year. In July 2022 the transfer of all data to the **new Beacon Customer Relationship Management (CRM) system** was begun and our office and administration staff have been working hard to ensure all data is clean and up to date. The implementation of the CRM has been a major project for the charity spanning the whole of the year, but is already providing us with increased efficiencies in the membership, fundraising, volunteer onboarding, co-ordination and management functions of the charity. We continue to work to utilise the system to develop efficiencies and capabilities in managing supportive events, digital communications and finance.

As we grow and develop, the charity requires **efficient and timely finance functions**. To meet these needs during the year a decision was made to move to a new bookkeeping service and accounting software – Xero – which is able to integrate with the Beacon CRM. Preparation for the move took place during autumn/winter 2022/23, with everything in place for the switch over by 31 March 2023.

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Prerequisite goal 2) **Ensuring sufficient funds are raised so strategic objectives can be met.**

Annual and three-year fundraising plans and targets were developed by Stephen Armstrong and Jenny King – our fundraising team - but had to be modified to meet a more challenging grants and donations environment than expected. Excluding membership and friends of TCF donations, merchandise sales, booking fees for supportive events or Gift Aid, fundraising income remained broadly as the previous year (with just a small 1.03% increase). Grants from trusts and foundations took the biggest hit with income down over 25% on the prior year. Income from challenge events and community fundraising was just up (3.5% increase) on budgeted expectations, reflecting the return to in-person events after the pandemic and lockdown years as well as the launch of the first charity-wide annual fundraising event – the 2.5 Challenge. A fundraising highlight was the October 2022 Royal Parks Half Marathon: nine runners raised over £16,000 for our charity. We were also fortunate in early 2023 to be gifted the opportunity to auction a desirable classic car owned by Kirk and Pam Mawer's daughter, Lizzie, raising a £14,000 donation from the buyer.

However, the reduced income from fundraising activities overall was a consequence of the challenges posed by the economic and political environment. Expenditure for the year, therefore, needed to be in accordance with lower fundraising income than expected and thus we were unable to push forward with some of the additional staff and activities planned to meet our strategic objectives – including the appointment of a sibling support coordinator and communications manager.

### **Delivering on our strategic objectives - how did we do?**

Alongside the prerequisites, in year 2 of the Plan the charity **concentrated on working towards and delivering our key objectives** set by the strategic goals outlined in the Plan. The following section outlines in brief our progress meeting these targets by the end of March 2023.

- **Increase reach/quantity/scope and quality of services to bereaved parents.** Our target of 12,000 users of our support by 2024 is on track, with a reach of **11,000 bereaved individuals** on our CRM system by end of the current reporting period. An additional 500 individuals are professional contacts. Our service quality is also improving as we offer increased support and opportunities for training and learning to volunteers and act on feedback and evaluations of our services from bereaved individuals.

Despite the challenging recruitment environment, during the period of this report, 33 new volunteers were recruited and onboarded, including 12 group facilitators/co-facilitators, five online group facilitators, five offering one-to-one local support and eight new walk facilitators. six volunteers retired or stepped away from supporting during this period, with others taking a break to attend to other life priorities post pandemic. (Figures do not include grief companions – see below).

- **Expand the services of TCF in those regions of the UK which are underserved**  
Underserved regions were initially identified as Northern Ireland, some parts of Scotland, Wales and some areas of Northern England and SW England. **Additional support days**

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were run in 2021/2022 in some of these areas and work undertaken to source new venues for bereavement support days in areas in Northern England and Wales. New **local groups** have been set up in some of these areas. Informal support has been put in place too with **TCF walks and lunches/teas** for bereaved parents, siblings and grandparents taking place in Scotland, Merseyside, SW England, Derbyshire.

It should be noted that challenges are now arising in hitherto well-served areas, as key support groups closed during the year in important and relatively densely populated areas such as Hampshire, Surrey and Kent.

- **Increase diversity and reach of TCF across all minority and under-represented groups, both in our service and throughout the organization**

A **trustee working party** was set during this period to look at the area of equality, diversity and inclusion and make recommendations. Our initial targets will be **a policy document, as well as diversity and inclusion planning and training for all staff and volunteers** which will be implemented by end 2023.

- **Improve and develop support for bereaved siblings**

Our target was to reach 1300 bereaved adult siblings by 2024. During the period of this report our reach grew to 1200 and despite the challenging volunteering environment we recruited **5 new sibling volunteer supporters**. We held 2 bereavement support in-person events in 2022 - one of which was a partnership with the University of Sheffield - and 2 are planned for 2023. We now offer a dedicated email newsletter for bereaved siblings and regular online support groups for adult bereaved siblings. The private Facebook group for siblings continued to grow in member numbers offering a forum for bereaved siblings to connect and find understanding together.

- **Provision of support for bereaved parents in specific circumstances**

Although there is much that unites as bereaved parents than divides us, we do allocate our scarce resources in a targeted way where we can make a difference to parents in specific types of circumstances.

During the period of this report, the main cause of death shared with us continued to be **suicide** by sons and daughters from age 13 through to adults in their 50s. The majority of deaths by suicide were as the result of a first attempt, with depression, anxiety, stress, bullying, alienation, loss or relationship issues being cited as some of the main underlying factors. Loss to **drug and alcohol use** continued to rank high on causes of death too with many parents mentioning that substance use increased for their child during the lockdowns and in the months immediately afterwards when the world was opening up. Substance use was often cited as one of the contributing factors in losing a child or sibling to suicide. Many parents continued to share with us the societal stigma, judgemental attitudes and lack of understanding they face, with few avenues to turn to for support.

We continued to develop specific support for specific causes of loss such as suicide or substance use – with the provision of regular online (for suicide and substance/alcohol use) and in-person support groups (for suicide – in London, Glasgow, Bristol for instance). Our team of bereavement by suicide supporters offer one to one contact for any parent



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bereaved by suicide throughout the UK. We also offered an annual retreat weekend for parents bereaved by suicide or substance/alcohol use in July 2022.

Parents who have experienced the **loss of an only child or all their children** can be particularly vulnerable. We bring these parents together in a regular online support group to share and find understanding together. During the period of this report, we ran a weekend retreat in Oxfordshire for these parents and a regular printed and email newsletter specifically for parents without surviving children.

We started to offer occasional **online support groups for parents in specific circumstances** including a new group for parents bereaved by Covid or during the pandemic, parents who had experienced the loss of more than one child and parents bereaved in the last three years. We continued to offer online group support to other parents including those bereaved by cancer, by road traffic accident, loss of a baby/toddler and loss of a school age child.

Some support was offered to parents bereaved of a **child with disabilities or complex needs**. It remains challenging to find volunteers who are willing to be peer supporters around loss to murder or manslaughter and for grandparents (bereaved of a grandchild).

At retreat weekends and bereavement support days, we continued to offer sharing sessions around specific causes of loss or life circumstances. A bereavement support information pack is sent to all new parents in contact with us. The packs are always customised to support parents and families in different circumstances of loss.

Our 12 moderated, private online Facebook groups focusing on different aspects of loss continued to grow in member numbers. These include those for parents bereaved through cancer, through suicide, by substance use or alcohol, the loss of a baby or very young child, for parents who have lost their only child or all their children, and more.

- **Increase public awareness of TCF**

In February/March 2023, TCF worked with the world's largest outdoor advertising company, JC Decaux, and advertising and branding agency, The Raised Eyebrow Society, to launch a **hard-hitting campaign raising awareness of parental bereavement, some of the challenges surrounding child loss, and how peer support can help**. The campaign was gifted free of charge to our charity. Large, illuminated digital posters were displayed at over 200 roadside sites throughout the UK for a minimum of 14 days. The advertisements were shown 22 million times (adult impressions). A social media campaign was run alongside reaching over 30,000 users on Facebook with similar percentage increase in followers on Instagram and Twitter.

Helpline calls and emails were slightly up during the period of the campaign, and website traffic from new users were up by 29%, with users overall increasing by 27%. An article in Woman & Home (circulation 204,000) was published as a direct consequence of the awareness campaign. We warmly thank everyone at JC Decaux, The Raised Eyebrow Society and the designers and artists who made the campaign possible.

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### MEETING OUR STRATEGIC OBJECTIVES THROUGH OUR SERVICES. How did we do?

Throughout the period of the report and year 2 of the Strategic Plan, we continued to focus on the provision of high-quality, accessible peer support to parents and their families through our services and support. All our services work together to offer bereaved individuals the type of peer support that feels most helpful and appropriate for their particular needs at whatever point they are in their loss.

#### National Helpline

**Approximately 1,200 calls** were received by our Helpline during the period April 2022 to end March 2023 – this was a significant **increase of over 33%** on calls received in the previous year (when we were still in the midst of pandemic lockdowns). More than **1,400 requests for email support** were also received – representing a huge **47% increase**. We are increasingly finding that more parents prefer initial email contact as it can be so very difficult to speak verbally about their devastating loss and grief, particularly in the early weeks and months after their loss.

As in previous years, the majority of calls and emails continued to be from bereaved mothers, although there was a significant increase in requests from professionals and support agencies during this period, including GP practices, counsellors, mental health support works and organisations offering specific support such as Brake (a road traffic incident support charity) or Meningitis Now who wished to signpost a parent to our support to supplement the support their organisation was already offering. The largest increase in enquiries and referrals continued to be from wellbeing and mental health support roles such as social prescribers, wellbeing advisers or mental health team representative. Our initial responses to these agencies are important in terms of building understanding and trust in our charity and what we offer to grieving parents and adult bereaved siblings.

What professionals have said:

*“You’re doing some fantastic work, to help others in a similar position, so I want to thank and acknowledge your hard work and to let you know that I really appreciate your dedication to this cause and all the wonderful work your organisation is doing for everyone, that finds themselves bereft with losing a loved one”* (from a professional who had contact with us by email on behalf of a bereaved patient).

Wider family and blended family members and friends continued to contact us too with concerns about their bereaved family member’s emotional and physical health following the loss of their child or sibling. They were often grateful for our support and reassurance.

What family members have said:

*“Thank you for putting my partner in touch with your helpline. He called last night and for the 1st time in 3 months there seems to be a teeny tiny light at the end of a very long tunnel - it's a start and I couldn't be more thrilled and relieved; your helpline team member was so easy to talk to.”*



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Our Helpline and Volunteer Manager, Ruth Mercier trained and supported our 19 dedicated Helpline volunteers, who answered calls every day of the year during this period.

What newly bereaved parents say:

*"I don't think (the volunteer) will ever realise how very much she helped because of her time and words on that evening. I have found an inner strength, I have found someone who does know how I feel, who can tell me that life can carry on, in a different way".*

### Local support groups and one-to-one support

By April 2022 all local support groups who were planning to return to supporting in-person after the lockdowns were back to meeting face-to-face. Most meet monthly. **99 facilitators and co-facilitators offered groups for parents** (and sometimes adult bereaved siblings) to meet and share together in a well-facilitated, safe and confidential environment in over 70 locations throughout the UK. During the latter half of the period of this report we experienced a **growth in referrals** of newly bereaved parents to local support groups in a number of different parts of the country. This can create large group sizes which can be overwhelming for volunteers - particularly for newer group facilitators. Our Volunteer Manager, Ruth Mercier worked closely with these volunteers to ensure they are supported and that referrals and group support dynamics are managed as best as possible.

Over **100 volunteers offered one-to-one telephone and in-person support** to grieving parents in their locality. Newly bereaved parents are put in touch with their local support contact or local group facilitators through the Helpline referral process. Again, this referral process needed to be managed carefully to ensure recently bereaved parents received appropriate support without overwhelming the local support volunteer.

We continued to offer group facilitation and local support training online for our volunteers. Sessions were run over four weekend half days in June and October 2022 and a full working day session in February 2023.

What parents say:

*"The regular group meetings are a lifeline for me. Thank you for facilitating the online support groups for bereavement by suicide so well and making differences to the lives of bereaved parents".*

### In-person and online supportive events

During this period, our supportive events moved from almost totally online to a **hybrid provision**, continuing with a rationalised online support group provision, while also returning to in-person retreat weekends and support days.

So, we continued to provide online support groups for parents in specific circumstances, but as in-person supportive events returned we reviewed the programme and concentrated on offering groups where there was a significant and ongoing need. **43 online groups** were run during the period of this report, facilitated each time by at least 2 volunteers. A maximum of 15 parents/siblings attended each group and we provided groups for loss of an older adult child (35 years+), bereaved by road traffic incident, suicide, baby/toddler loss, bereavement of a

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school age child, loss to cancer, loss to substance or alcohol use. Groups were also held for parents who had suffered the loss of more than one child, for parents bereaved of their only child or all their children, and for parents bereaved by Covid or in the last three years. The group for bereaved fathers ran regularly too over the year. We offered four opportunities for bereaved adult siblings to come together online in a support group meeting.

What parents say:

*"Thank you again, TCF, for your support and kindness. I always feel more ready to keep going after talking with TCF groups online and knowing I am not alone".*

As the lockdowns lifted, and anxieties about Covid eased, we were able to return to offering a range of **in-person retreat weekends and support days**. Each event was usually delivered by a team of volunteers, often including some staff members, with the bulk of the organisation, co-ordination, administration and volunteer support given by our Events Manager, Sharon Rose. A full programme for each retreat is offered including talks, workshops, sharing sessions, and other supportive activities. We request evaluations from participants at each of our events and make changes to subsequent retreats based on this feedback.

We offer **bursaries** to any bereaved individual who would be unable to attend a weekend or support day without financial assistance. During the period of this report, we experienced an increase in applications for this assistance as parents and siblings themselves were impacted by cost of living and other economic challenges. At the same time, the cost of venues and travel to venues is increased and we found that we were required to subsidise the cost of in-person supportive events even more than was the case pre-pandemic.

During the period of this report **two weekend gatherings for bereaved parents, siblings and grandparents were held in Stirling, Scotland** – one in May 2022 and the second in March 2023. The pent-up desire for parents to meet up in person meant that both events were very well attended with approximately 100 participants each time. Around one third of attendees at both events were newly bereaved (i.e. in the first three years of their loss). Both gatherings in Scotland during the year were predominantly delivered by volunteers.

We also returned to offering a **retreat weekend for parents bereaved by suicide or by substance or alcohol use**. This was held in Birmingham in June 2022. 14 volunteers supported 56 parents and one grandparent. 50% of parents attending had experienced the loss of their child less than three years ago, 68% fewer than five years ago. 40 parents at the retreat had lost a child to suicide, and 16 to drug use (sometimes tragically ending in suicide). The youngest child was 14 years old at their death.

This was followed in July by a **weekend retreat for parents bereaved of their only child or all their children** held in Oxfordshire. 25 parents were supported by seven volunteers. Feedback from parents was excellent overall, although for some first timers at such a weekend, it was a hugely intense and emotional experience.

A well-attended **support day** in Derbyshire was held in November 2022.

We had not been able to plan a **retreat weekend in England for all parents, siblings and grandparents** since before the pandemic in November 2019. In January 2023 in Northamptonshire we held our first national retreat weekend for over three years. 100 bereaved individuals attended and we were fortunate to have a volunteer team of over 25 in

# THE COMPASSIONATE FRIENDS

## TRUSTEES' ANNUAL REPORT

### YEAR ENDED 31 MARCH 2023

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number, offering a varied programme of workshops, guest speakers, sharing sessions, memorial activities and well-being activities. A third of the parents and siblings attending were in the first 3 years of their loss, the remainder were bereaved before 2019.

In February 2023, a retreat weekend for **parents in early bereavement** was organised and held in a venue near Bath, Somerset. 43 parents attended with 16 volunteers offering support. High ratio of volunteers to parents is needed due to vulnerability of parents in early grief attending. The most recently bereaved parent at the retreat was just four months from the loss of their child. All parents attending were less than three years since their loss, most in the first 12-24 months. Over 50% of parents attending were bereaved by suicide or substance use.

What parents say:

*"It's been my first experience of TCF and I'm so impressed by the whole organisation. The weekend was so well organised and all run by fellow bereaved volunteers. It was an incredible experience".*

*"Being at a retreat everyone knows why you're there. You don't need to explain this heavy grief you carry around ...you never go home feeling alone, and that's something TCF facilitates so well."*

Two supportive in-person events were held for bereaved adult siblings during the year. In May 2022 an **overnight retreat for 35 siblings** was organised in Birmingham, followed by a **supportive day event in Sheffield for 25 bereaved adult siblings**. Both events were run by volunteers who are adult bereaved siblings themselves.

What siblings say:

*"After losing my brother, I felt so alone. Thanks to this fantastic charity, I was able to find support and connection".*

### Grief Companion Scheme

Now in its third year of operation, our Grief Companion Scheme has continued to offer one-to-one peer support to newly bereaved parents. A grief companion is a TCF volunteer who offers telephone or email support to a more recently bereaved parent. Typically they offer this support once a week, for about an hour, for a period of up to 12 months, although this can vary according to need. This is usually when a recently bereaved parent has no other TCF support close by but can also be where existing support is unsuitable for some reason (e.g., social anxiety, physical frailty, disability or transport or financial constraints restricting ability to travel). Since its inception, the Scheme has **supported over 220 parents** in early grief (usually within the first two years of their loss). The scheme is expertly managed by Shirley Gower, Grief Companion Manager with support from Suzanne Cannon, Administrator for the Scheme. Many new innovations have been introduced during this year including a comprehensive induction document for all new grief companions.

During the period of this report, there were **64 'matches'**, (i.e. where a bereaved parent volunteer has been put in contact with a more recently bereaved parent who has been referred to the scheme through the Helpline). The Volunteer and Helpline Manager and Grief Companion Manager worked closely together to ensure appropriate support is put in place for newly bereaved parents where it was felt that this type of peer support would be beneficial. On average there were five matches made per month. 85% of matches made continued for the

# THE COMPASSIONATE FRIENDS

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full 12-month period of support. From mid-2022, we saw the number of referrals of newly bereaved parents increase and this has been a trend that has continued during the whole of the subsequent reporting period. Almost 50 volunteer grief companions were actively supporting during the year, with eight of those supporting more than one parent at a time. It has been important for the Scheme to have a pool of grief companion volunteers who are ready to support. It has meant that we could get help to parents very quickly compared to some other services.

*"The Grief Companion Scheme is such a vital part of the support we can now offer to bereaved parents who might find groups difficult or inaccessible". S, TCF staff team member.*

What parents say:

*"[My grief companion's] support was invaluable at a most terrible time in my life - it was the first time I had really looked for outside support and I couldn't have asked for anything better ... she certainly kept me from drowning in my grief, explaining that going backwards was normal when I thought I had made no progress. It felt like she was swimming beside me and when I started to go under, she was there keeping my head above the water".*

*"Having [my Grief Companion] in my life has given me a lifeline. Her presence has been a beacon of security and hope".*

**Volunteers also benefit** from the grief companion role. Many tell us that being able to support and offer empathic listening to another grieving parent has helped them with their own grief for their child.

What grief companions say....

*"[Being a grief companion has] given me a sense that something good can be borne out of something so very awful - to be able to give support/guidance as someone who "gets it" has been amazing - and it's been lovely to be able to share memories of both our amazing girls with each other".*

### Informal support – Walks, lunches and teas

Spring 2022 saw the re-start and huge **development in walks** for bereaved parents, siblings and grandparents across the UK. New walk facilitators came forward during the year, and **eight new volunteers joined the existing team** offering walking and talking opportunities not only in London, but also in Cumbria, Suffolk, Wales/Shropshire, Merseyside, Scotland, South West England, Buckinghamshire and more. A total of 38 walks were held during the year, most in the spring, summer and early autumn months, but one or two also held during the winter. Support was offered to volunteer walk facilitators through regular sharing and sessions. The walking programme has grown so fast this year that the administration of the walks was taken on in autumn 2023 by the Volunteer Support Assistant. We regularly receive feedback from parents and siblings about the value of these informal events in providing an environment for bereaved individuals to make connections and share together.



# THE COMPASSIONATE FRIENDS

## TRUSTEES' ANNUAL REPORT

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What parents say:

*"The walks we have been on... are the first thing we felt able to do, since our son's death where we could walk and talk with others who truly know the depth of grief we have all experienced. This has been healing and helped us try to get back on our feet".*

An **afternoon tea** was held in Perthshire for bereaved parents in August 2022 hosted by TCF volunteer, Fiona Foreman. In September 2022 an **informal lunch** was held in London (organised by former Chair of Trustees, Maria Ahern). 45 bereaved parents attended.

#### **Informal support - Manoir Mouret**

During the period of this report, we began a new relationship with a **retreat venue in France**. Jack and Margaret Reckitt, the owners of Manoir Mouret, which is about an hour from Toulouse, offered their beautiful venue for respite and a break for bereaved parents supported by TCF. The first 12 parents attended the first week offered in August 2022. One of the most difficult challenges for bereaved parents is to go on holiday and so although this was not a TCF-managed retreat weekend, it offered a way for bereaved parents to come together in a warm and welcoming environment. This first week was hugely successful. Three further weeks will be made available in 2023.

#### **Online, digital and printed communications and support**

In the early part of the year, we continued to offer **online talks** which had been a feature of our support during the lockdown. In July, Dr Laura Towers offered an online presentation, chaired by TCF Trustee Claire Coveney, based on her four year study at Sheffield University -**Life After Death: Experiences of Sibling Bereavement Over the Life Course**. An audience of over 90 attended. Also in July 2022, Barbara Douglas offered an online presentation to 100 attendees exploring the subject of **Trauma and Bereaved Parents**, covering the reality of the post-traumatic stress symptoms experienced by many bereaved parents and family members and an examination of what can help. Our online **Candlelighting** took place in December 2022 – just before the Christmas holiday, which is a particularly painful and difficult time for bereaved families. Each talk/or online event was recorded and uploaded online, building a resource library of supportive videos which will continue to be accessed.

TCF publish over **50 leaflets** offering information and suggestions to bereaved parents and families, as well as professionals and family supporters. These were downloaded over 40,000 times this year and distributed with bereavement support information packs sent to every new parent, sibling or grandparent that contacts us. As well as updates of existing publications during the year, new leaflets were published including **Coping with Friends, Family and Social Situations**, **Our Grief Following the Accidental Death of our Child** and **Sibling Grief After Suicide**. Thank you to Abi May and her team of leaflet writers, editors and proof-readers for continuing to develop our leaflets and fact sheets to ensure they are inclusive, up-to-date and relevant.

We continued to send **regular email and printed news, magazines and communications** to parents, siblings and grandparents. Our **library of over 1,000 books** and resources on all aspects of bereavement and grief began to be fully operational once again after the pandemic. Mary Hartley, our dedicated volunteer librarian, resumed her personalised service of recommending and sending helpful books to parents and other family members.

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Our **social media presence** continued to build throughout the year on Facebook, Twitter and Instagram. Our Facebook page was visited over 106,000 times in the period between 1 April 2022 and 31 March 2023. Our Instagram page attracted over 3,500 new visits. Many bereaved parents and their families have told us they regularly access support and information from our social media posts.

#### Collaboration and networking

During the year, TCF was cited or involved in advising and/or finding participants in a number of research studies. A bereaved by suicide in later life report mentioned TCF as a key player in support for parents who have lost to suicide. Our charity was involved in a call for participants for a University of Bristol study in to the emotional care of parents who have cared for and lost a child with a life limiting illness; a University of Cardiff study for anyone bereaved by Covid; an Institute for Crime and Justice Policy Research (Birkbeck, University of London) and the Centre for Death and Society (University of Bath) research study Voicing Loss: Meanings and Implications of Participation by Bereaved People in Inquests. We are also supporting a new research study into work and bereavement from the University of Sheffield. We have also been invited to contribute to the Child Death Review conducted by University of Birmingham/NHS Birmingham Community Healthcare, a study on Sibling Loss in Adolescence by a researcher at the University of Middlesex and have been invited to join advisory board for a new study exploring siblings experience of suicide bereavement.

We continue to collaborate with other charities and organisations in the field of bereavement support. TCF are members of the **All-Party Parliamentary Group on Bereavement Care**. We attend Members Meetings of the **Support After Suicide Partnership** to represent the views of parents and siblings bereaved by suicide. We attended the **Suicide Bereavement UK Conference** (September 2022) and exhibited at the **Police Family Liaison Officers National Conference** in October 2022.

Our previous Chair of Trustees, co-opted Trustee and long-time volunteer, **Margaret Brearley**, was the recipient of the late Queen's Platinum Jubilee Volunteering Award in June 2022. TCF volunteer **Carol Keach** received the British Empire Medal in King Charles III's New Year honours (January 2023) in recognition of over 30 years of service to the community through her work with bereaved parents with TCF in Northamptonshire.

#### Future plans – from growth to consolidation

During years 1 and 2 of the Strategic Plan, the focus has been on building the **infrastructure** of the charity to help us to meet demand for our services. The central emphasis has been on developing **strategic goals** and supporting **growth** not only in our reach to bereaved parents and their families throughout the UK but also the quality of peer support offered.

In year 3 (2023-24), we will move to a period of **consolidation** allowing this rapid period of change and growth to 'bed in'. This will ensure that we can continue our consistency of support and allow our volunteers and staff team to focus on continuing to provide high-quality peer support to parents, siblings and grandparents throughout the UK.

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In a challenging environment for recruitment and retention, we plan to continue to **prioritise self-care, resilience building and support for our volunteers**, all of whom offer the peer support and empathic listening which is at the heart of the bereavement support services provided by TCF. We will do this by offering high quality initial and ongoing training for volunteers, free of charge access to our Hear for You listening support scheme for volunteers and by bringing our volunteers together regularly for support and sharing of best practice in-person and online. We will strengthen and streamline our volunteer on-boarding, induction and training processes and introduce robust volunteer two-way agreements to ensure we are valuing and rewarding volunteers' vital contribution to the charity as highly as possible. We will continue to ensure that our Helpline and Volunteer Manager, Ruth Mercier, has strong administrative support in place to allow her to concentrate on the support and management of volunteers.

As our staff and volunteer teams grow we will begin to **outsource Human Resources (HR) support** to ensure that we are offering an up-to-date, compliant, inclusive and compassionate working and volunteering environment. We will continue to add to our staff team and outsource support for the team as resources allow – to build our capacity in supportive events, communications and fundraising.

We will continue **a hybrid approach** – both **in-person and online** - to offering support. This will include **in-person** general support days around the UK and retreat weekends for all organised by location e.g. Scottish retreat weekend, UK retreat weekend, as well as targeted retreats for specific causes of death(e.g. parents bereaved by suicide or substance use), life circumstances (e.g. parents bereaved of an only child or all their children) or for those in very early bereavement. We will continue to provide local in-person support groups around the UK and work towards increasing the availability of local support where possible. We will continue to encourage informal events for bereaved parents and siblings, including support for our programme of walks, and other informal events such as bring and share lunches and teas. These can be an important first step for the newly bereaved to start to engage with the more formal, structured peer support services.

Our rolling programme of **online support groups** for parents in particular circumstances and for bereaved adult siblings will continue. These offer the opportunity for grieving individuals to access peer support wherever they are located in the UK. We will continue to review demand for these and adjust the number and type of groups as necessary.

We will continue to offer **high quality national Helpline support** – both by telephone and email. This support will remain steady, of a consistent high standard, and available every day – a much needed anchor in a period of national and personal adjustment following the pandemic and as bereaved individuals are faced with economic challenges.

As we come to the end of the three- year funding for the **Grief Companion Scheme project**, we hope to secure continued funding for this important layer of support provided to bereaved parents throughout the UK, particularly where there is no other in-person available or accessible.

We will continue to develop the **efficiency of the administrative and financial operations** of our charity using the new Beacon CRM and outsourcing our bookkeeping functions. These changes will allow us to communicate with and support our members with greater regularity

# THE COMPASSIONATE FRIENDS

## TRUSTEES' ANNUAL REPORT

### YEAR ENDED 31 MARCH 2023

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and ease and manage all our operations – volunteer management, supportive events, finance, membership, fundraising, communications with greater productivity, clarity and efficiency.

We will work to **diversify our income**, including multi-year funding for key projects, targeting local funding for local support for bereaved parents and families and accessing corporate funding where we can. We will continue to prioritise stewarding for our supporters who participate in personal challenges and community fundraising. We will continue to work to increase our charity's funding from digital sources.

We will develop a forward looking **2024-2028 Strategic Plan hand-in-hand with a Communications Plan** to continue building the charity's reach and development. We will continue to regularly survey and garner feedback from all TCF users to monitor satisfaction and develop and change our services where needed.

### Financial Review

The Trustees are responsible for the finances of the Charity. They monitor the finances of TCF by adopting a budget for each financial year and receiving a financial report at each Trustee meeting.

The Trustees monitor three main aspects of the charity's finances:

- The income from various sources
- The expenses
- The reserves

### Income

The income of the charity comes from four main sources as follows:

- Membership and general donations
- The proceeds from fundraising events and donations from Friends of TCF
- Securing grants and donations from foundations, trusts and corporate bodies
- Fees in respect of gatherings and retreats

Unrestricted income can be spent on TCF's general charitable purposes as set out in the budget for the year.

Restricted income can only be spent on particular purposes/projects as specified by the donor.

During the year the total income of the Charity was £488,834 (2022: £459,980). The split between Unrestricted and Restricted Funds received in the year is:

Unrestricted    £355,547 (2022: £256,237)

Restricted        £133,287 (2022: £203,743)

### Expenditure

During the year the charity spent £567,343 (2022: £378,221).



# THE COMPASSIONATE FRIENDS

## TRUSTEES' ANNUAL REPORT

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The split between Unrestricted and Restricted Fund expenditure during the year is :

|              |                            |
|--------------|----------------------------|
| Unrestricted | £420,936 (2022: £211,781)  |
| Restricted   | £146,407 (2022: £ 166,440) |

The strategic plan for year 2 (as referred to earlier in this Report) included expenditure in respect of additional staff to enable growth in the charity's outreach and support. Unspent funds brought forward from the previous year (2021-22) were drawn down in order to achieve our goals.

#### Reserves

During the year TCF's expenditure of £567,343 exceeded income of £488,834 by £78,509.

The deficit reduced the funds as follows:

|                    |           |                            |          |
|--------------------|-----------|----------------------------|----------|
| Unrestricted funds | £(65,389) | Total funds at 31 March 23 | £356,099 |
| Restricted funds   | £(13,120) | Total funds at 31 March 23 | £78,693  |

The Trustees give careful consideration to the level of reserves. The Charity's policy on reserves is set out as follows:

"The Trustees have, after considering the guidance issues by the Charity Commission, established a policy that sufficient general funds should be held to enable the activities of TCF to continue for a minimum of six months taking into account:

- (i) The forecast expenditure of running the Charity allowing for planned increases or decreases in ongoing expenses
- (ii) The current sources of income and the heavy reliance on one off donations and fundraising events
- (iii) A review of the risks facing the Charity, particularly those which would lead to a reduction in the level or reach of our services

The level of free reserves of £356,099 is sufficient for activities to continue for six months and funds are reviewed on a regular basis throughout the year. Currently, the monthly cost of salaries and other costs for providing support to bereaved parents, siblings and grandparents amounts to approximately £50,000. Should reserves exceed this amount by 50% on a monthly basis for six months then Trustees would review the programme of events and support and increase activities in order to keep reserves down to an economically viable level, thus ensuring provision of maximum support services to those in need.

This policy is reviewed at least once every financial year.

The Restricted funds balance at 31 March 2023 was £78,693; these funds can only be spent on projects for which the original fund application was made.

The Trustees are responsible for investing the reserves of TCF. In light of the periodic need to draw on the funds at short notice the Trustees have decided to keep the reserves on bank deposit.

# THE COMPASSIONATE FRIENDS

## TRUSTEES' ANNUAL REPORT

YEAR ENDED 31 MARCH 2023

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### Structure, Governance and Management

As a company limited by guarantee registered in England & Wales, TCF is governed by its Memorandum & Articles of Association. The organisation was based in Kilburn, London, throughout the year with a network of volunteers throughout the United Kingdom.

The Board of TCF is comprised of between six and twelve elected Trustees. An Elected Trustee must be a Member and has to be nominated by a donating TCF Member and provide a short CV, details of their experience within TCF and a personal statement. Candidates are supplied with information on the responsibilities of a Trustee prior to election and after election they are supplied with further charity guidance booklets and details of relevant external information and training days on charity governance and management. Elected Trustees serve for three years (extendable to three years and three months). Elections are held annually and by digital and postal vote; if the number of vacancies for elected Trustees exceeds the number of nominated candidates, then the candidates are deemed to have been elected and there is no need for a vote. No elected Trustee can be in office for longer than three terms of three years, either served consecutively or with breaks. The chair can only serve for a maximum of three years.

Members of the Charity and external candidates with the required knowledge and skills needed on the Board of Trustees are also invited to apply to join as a co-opted Trustee. In addition, Trustee Advisors can be invited to join the Board for varying short periods of time in order to give the Board specialist advice or help.

All strategic directions and policies are determined by the Board of Trustees and monitored at regular Board meetings and against an annual budget.

All key decisions regarding policy, strategy, finance, governance and major pastoral issues, are taken by the Board of Trustees. Decisions are reached by a majority vote of Trustees, either by voting at the regular Board meetings (absent Trustees are regarded as bound by the majority votes of all Trustees present) or through Board members voting by email. Certain decisions regarding the pastoral work, volunteer recruitment, training and support are delegated to the CEO and operations team but need to be ratified by the Board before they can be implemented. Key decisions regarding office management are taken by the CEO in close consultation with the Chair or Co-Chairs of Trustees and, where appropriate, the Board of Trustees.

In making arrangements for setting pay and remuneration for the charity's key management personnel, the Trustees always bear in mind rates of pay for equivalent roles in charities of comparable size. In setting the pay for the Chief Executive, the Trustees considered the requirements for the role and pay for comparable roles in similarly sized charities. The Trustees will review the pay of the Chief Executive at least once a year.

### Risk Assessment Policy

The Trustees regularly review and update identified major risks that might face the charity and its ability to function in pursuit of its charitable objectives, as a result of loss of reputation caused by inappropriate guidance being given to our beneficiaries, or an inability to maintain

# **THE COMPASSIONATE FRIENDS**

## **TRUSTEES' ANNUAL REPORT**

### **YEAR ENDED 31 MARCH 2023**

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its current level of activities through lack of funding. In addition, risks associated with each identifiable project are assessed before it is undertaken.

In general terms, the Trustees regularly consider any areas of TCF operations where there is a perceived risk to the charity and appropriate action is taken to manage any risks that are identified.

The Trustees identified the principal risks facing the charity: the risk of inadequate future funding; the possible loss of current staff; the risk of losing volunteers.

The Trustees adopted the following plans and strategies for their mitigation; expanding the hours worked of the experienced fundraiser and, in September 2021, appointing a new Events and Community Fundraiser; a series of initiatives to retain and support staff are included as part of the three-year strategic plan; a series of initiatives to support and train volunteers were included in the three -year strategic plan.

#### **Data Protection/Privacy Policy**

TCF is committed to protecting people's personal information. Our Privacy Policy (available to view and download from our website) sets out the basis on which we process any personal information collected or provided to us.

# THE COMPASSIONATE FRIENDS

## TRUSTEES' ANNUAL REPORT

YEAR ENDED 31 MARCH 2023

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### Trustees' Responsibilities

The trustees (who are also directors of The Compassionate Friends for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the strategic report and directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure, of the charitable company 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;
- 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; and
- 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 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.

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

*Melian Mansfield*

Melian Mansfield  
Co-Chairs of Trustees

*George Burn*

George Burn

Oct 06 2023  
Date: .....

# THE COMPASSIONATE FRIENDS

## REFERENCE & ADMINISTRATIVE INFORMATION

YEAR ENDED 31 MARCH 2023

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### The Trustee Board

**Chair:** Andrew Miller KC until 21 January 2023

**Vice- Chair:** Susan Hughes

**Co-Chairs:** Melian Mansfield and George Burn from 21 January 2023

**Company Secretary:** George Burn

### Other Trustees

|                         |                             |
|-------------------------|-----------------------------|
| Maria Ahern             | (resigned 23 January 2023)  |
| Margaret Brearley       |                             |
| Ken Barclay             |                             |
| Adelle Brenner          | (appointed 21 January 2023) |
| Gina Claye              | (resigned 23 January 2023)  |
| Claire Coveney          | (appointed 21 January 2023) |
| Alison Cramp            | (appointed 21 January 2023) |
| Gill Hardy              |                             |
| Jen Hughes              |                             |
| Sefton Kwasnik          | (appointed 21 January 2023) |
| Melian Mansfield        |                             |
| Andrew Miller           | (co-opted 21 January 2023)  |
| Sheila Phillips         |                             |
| Nisha Shah              |                             |
| Nigel Taylor (co-opted) |                             |
| Warren Weiss            |                             |

### Trustee Adviser

Guy Paton

### Chief Executive

Carolyn Brice

### Registered Office

Kilburn Grange  
Priory Park Road  
London NW6 7UJ

### Independent Examiner

Joshua Kingston, BSc., ACA  
Burton Sweet Limited  
The Clock Tower  
5 Farleigh Court  
Old Weston Road  
Flax Bourton  
Bristol BS48 1UR

### Bankers

CAF Bank Limited  
25 Kings Hill Avenue  
West Malling, Kent.

# THE COMPASSIONATE FRIENDS

## INDEPENDENT EXAMINER'S REPORT

YEAR ENDED 31 MARCH 2023

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I report to the charity trustees on my examination of the accounts of the charity for the year ended 31 March 2022.

### Responsibilities and basis of report

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

### Independent examiner's statement

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

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:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.

*Joshua Kingston*

Joshua Kingston BSc., ACA  
Burton Sweet Limited  
The Clock Tower  
5 Farleigh Court  
Old Weston Road  
Flax Bourton  
Bristol BS48 1UR

Date: Oct 06 2023

# THE COMPASSIONATE FRIENDS

## STATEMENT OF FINANCIAL ACTIVITIES (INCLUDING INCOME AND EXPENDITURE ACCOUNT)

YEAR ENDED 31 MARCH 2023

|  |           | Unrestricted Funds | Restricted Funds | Total Funds 2023 | Total Funds 2022 |
|--|-----------|--------------------|------------------|------------------|------------------|
|  | Note      | £                  | £                | £                | £                |
| <b>Income from:</b>                                      |           |                    |                  |                  |                  |
| Donations  | 2         | 190,440            | 112,566          | 303,006          | 308,350          |
| Charitable activities                                    | 3         | 83,543             | 19,409           | 102,952          | 84,685           |
| Other trading activities                                 | 4         | 79,031             | 1,272            | 80,303           | 66,874           |
| Investments  | 5         | 2,533              | 40               | 2,573            | 71               |
| <b>Total income</b>                                      |           | <b>355,547</b>     | <b>133,287</b>   | <b>488,834</b>   | <b>459,980</b>   |
| <b>Expenditure on:</b>                                   |           |                    |                  |                  |                  |
| Raising funds  | 6         | 76,872             | -                | 76,872           | 64,400           |
| Charitable activities                                    | 7         | 344,064            | 146,407          | 490,471          | 313,821          |
| <b>Total expenditure</b>                                 |           | <b>420,936</b>     | <b>146,407</b>   | <b>567,343</b>   | <b>378,221</b>   |
| <b>Net income/(expenditure) and net movement in fund</b> | <b>10</b> | <b>(65,389)</b>    | <b>(13,120)</b>  | <b>(78,509)</b>  | <b>81,759</b>    |
| Total funds brought forward                              | 17        | 421,488            | 91,813           | 513,301          | 431,542          |
| Total funds carried forward                              | 17        | 356,099            | 78,693           | 434,792          | 513,301          |

The Charity has no recognised gains or losses other than the results for the period as set out above.  
All of the activities of the charity are classed as continuing

The comparative Statement of Financial Activities is shown in note 12.

The notes on pages 27 to 38 form part of these financial statements

# THE COMPASSIONATE FRIENDS

## BALANCE SHEET

AS AT 31 MARCH 2023

Company Number 04029535

|  | Note | 2023<br>£       | 2022<br>£      |
|--|------|-----------------|----------------|
| <b>Fixed assets</b>                                    |      |                 |                |
| Tangible fixed assets                                  | 13   | -               | -              |
| <b>Current assets</b>                                  |      |                 |                |
| Debtors  | 14   | 40,149          | 45,570         |
| Cash at bank and in hand                               |      | 411,108         | 476,530        |
|  |      | <u>451,257</u>  | <u>522,100</u> |
| <b>Creditors : Amounts falling due within one year</b> | 15   | <u>(16,465)</u> | <u>(8,799)</u> |
| Net current assets                                     |      | 434,792         | 513,301        |
| <b>Net assets</b>                                      |      | <u>434,792</u>  | <u>513,301</u> |
| <b>Funds</b>   |      |                 |                |
| Restricted funds                                       | 18   | 78,693          | 91,813         |
| Unrestricted funds                                     | 18   | 356,099         | 421,488        |
| <b>Total funds</b>                                     |      | <u>434,792</u>  | <u>513,301</u> |

For the year ending 31 March 2023 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

- (i) The members have not required the company to obtain an audit of its accounts for the year in question in accordance with section 476,
- (ii) The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

These financial statements were approved by the trustees on Oct 06 2023 and are signed on their behalf by:

*Melian Mansfield*

Melian Mansfield  
Co-Chairs of Trustees

*George Burn*

George Burn

The notes on pages 27 to 38 form part of these financial statements



# THE COMPASSIONATE FRIENDS

## NOTES TO THE FINANCIAL STATEMENTS

### YEAR ENDED 31 MARCH 2023

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#### 1 Accounting policies

##### a) Basis of preparation

The financial statements have been prepared in accordance with the historical cost convention and 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 (or Companies Act 2006) and UK Generally Accepted Practice as it applies from 1 January 2019.

The charity is a public benefit entity as defined by FRS102.

The accounts have been prepared under the going concern concept, as the trustees believe this to be the most appropriate as it is considered that there are no material uncertainties, although the cost of living crisis during the past 12 months has been taken into account. Currently, income is sufficient but should there be a significant reduction, Trustees will review outgoings and plan accordingly.

##### b) Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.

##### c) Grants

Grants, including grants for fixed assets, are recognised within the accounts as they become receivable. Grants received in the accounting period in respect of future accounting periods are deferred until those periods.

##### d) Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably. Irrecoverable VAT is charged as a cost against the activity for which the expenditure was incurred.

Direct costs, including directly attributable salaries, are allocated on an actual basis to the activities. Support costs are allocated over the activities based on the estimated percentages of cost used.

Governance costs include the costs of meeting constitutional and statutory requirements and include costs associated with the strategic management of the charity's activities. They have been included in support costs.

##### e) Fixed assets

Expenditure on assets with an estimated economic life of more than twelve months and a cost of more than £2,000 are capitalised.

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

|                                  |                   |
|----------------------------------|-------------------|
| Fixtures, Fittings and equipment | 25% straight line |
|----------------------------------|-------------------|

##### f) Debtors

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

##### g) Cash at bank and in hand

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

##### h) Creditors

Creditors are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors are normally recognised at their settlement amount after allowing for any trade discounts received.

##### i) Operating leases

Rentals applicable to operating lease agreements where substantially all of the benefits and risks of ownership remain with the lessor are charged against profits on a straight-line basis over the period of the lease.

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

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**1 Accounting policies (*continued*)**

**j) Unrestricted funds**

Unrestricted funds can be used in accordance with the charitable objects at the discretion of the trustees.

Unrestricted designated funds have been set aside by the trustees out of unrestricted general funds for specific future purposes or projects.

**k) Restricted funds**

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

**2 Donations**

|                        | <b>Unrestricted<br/>Funds<br/>£</b> | <b>Restricted<br/>Funds<br/>£</b> | <b>Total Funds<br/>2023<br/>£</b> |
|------------------------|-------------------------------------|-----------------------------------|-----------------------------------|
| Donations and legacies | <b>177,015</b>                      | <b>72,972</b>                     | <b>249,987</b>                    |
| Grants receivable      | <b>13,425</b>                       | <b>39,594</b>                     | <b>53,019</b>                     |
|                        | <b><u>190,440</u></b>               | <b><u>112,566</u></b>             | <b><u>303,006</u></b>             |

**Prior year comparative**

|                        | <b>Unrestricted<br/>Funds<br/>£</b> | <b>Restricted<br/>Funds<br/>£</b> | <b>Total Funds<br/>2022<br/>£</b> |
|------------------------|-------------------------------------|-----------------------------------|-----------------------------------|
| Donations and legacies | 121,913                             | 186,437                           | 308,350                           |
|                        | <b><u>121,913</u></b>               | <b><u>186,437</u></b>             | <b><u>308,350</u></b>             |

Donations received from trustees and related parties during the year were £2,504 (2022: £2,140).

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

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**3 Income from: Charitable activities**

|                          | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | Total Funds<br>2023<br>£ |
|--------------------------|----------------------------|--------------------------|--------------------------|
| <i>Core activities</i>   |                            |                          |                          |
| Membership subscriptions | 16,833                     | -                        | 16,833                   |
| Other activities         | 51                         | 700                      | 751                      |
| Events                   | 66,659                     | 18,709                   | 85,368                   |
|                          | <b>83,543</b>              | <b>19,409</b>            | <b>102,952</b>           |

**Prior year comparative**

|                          | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | Total Funds<br>2022<br>£ |
|--------------------------|----------------------------|--------------------------|--------------------------|
| <i>Core activities</i>   |                            |                          |                          |
| Membership subscriptions | 22,161                     | -                        | 22,161                   |
| Other activities         | 23,249                     | -                        | 23,249                   |
| Events                   | 23,421                     | 15,854                   | 39,275                   |
|                          | <b>68,831</b>              | <b>15,854</b>            | <b>84,685</b>            |

**4 Income from: Other trading activities**

|                        | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | Total Funds<br>2023<br>£ |
|------------------------|----------------------------|--------------------------|--------------------------|
| Fundraising activities | 76,141                     | 1,272                    | 77,413                   |
| Trading income         | 2,890                      | -                        | 2,890                    |
|                        | <b>79,031</b>              | <b>1,272</b>             | <b>80,303</b>            |

**Prior year comparative**

|                        | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | Total Funds<br>2022<br>£ |
|------------------------|----------------------------|--------------------------|--------------------------|
| Fundraising activities | 60,454                     | 1,438                    | 61,892                   |
| Trading income         | 4,982                      | -                        | 4,982                    |
|                        | <b>65,436</b>              | <b>1,438</b>             | <b>66,874</b>            |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

**5 Investment income**

|                          | Unrestricted Funds | Restricted Funds | Total Funds 2023 |
|--------------------------|--------------------|------------------|------------------|
|                          | £                  | £                | £                |
| Bank interest receivable | 2,533              | 40               | 2,573            |
|                          | <u>2,533</u>       | <u>40</u>        | <u>2,573</u>     |

**Prior year comparative**

|                          | Unrestricted Funds | Restricted Funds | Total Funds 2022 |
|--------------------------|--------------------|------------------|------------------|
|                          | £                  | £                | £                |
| Bank interest receivable | 57                 | 14               | 71               |
|                          | <u>57</u>          | <u>14</u>        | <u>71</u>        |

**6 Expenditure on: Raising funds**

|                   | Activities undertaken directly | Support Costs (Note 8) | Total 2023    |
|-------------------|--------------------------------|------------------------|---------------|
|                   | £                              | £                      | £             |
| Sale of goods     | 4,106                          | -                      | 4,106         |
| Fundraising costs | 59,209                         | 13,557                 | 72,766        |
|                   | <u>63,315</u>                  | <u>13,557</u>          | <u>76,872</u> |

**Prior year comparative**

|                   | Activities undertaken directly | Support Costs (Note 8) | Total 2022    |
|-------------------|--------------------------------|------------------------|---------------|
|                   | £                              | £                      | £             |
| Sale of goods     | 984                            | -                      | 984           |
| Fundraising costs | 53,450                         | 9,966                  | 63,416        |
|                   | <u>54,434</u>                  | <u>9,966</u>           | <u>64,400</u> |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

**7 Expenditure on: Charitable activities**

|                           | Activities<br>undertaken<br>directly<br>£ | Support<br>Costs<br>(Note 8)<br>£ | Total<br>2023<br>£ |
|---------------------------|---|-----------------------------------|--------------------|
| <i>Core activities</i>    |   |                                   |                    |
| Helpline                  | 23,847                                    | 6,778                             | 30,625             |
| Library                   | 2,421                                     | 1,129                             | 3,550              |
| Gathering and events      | 167,375                                   | 44,059                            | 211,434            |
| Other pastoral activities | 197,413                                   | 47,449                            | 244,862            |
|                           | <b>391,056</b>                            | <b>99,415</b>                     | <b>490,471</b>     |

**Prior year comparative**

|                           | Activities<br>undertaken<br>directly<br>£ | Support<br>Costs<br>(Note 8)<br>£ | Total<br>2022<br>£ |
|---------------------------|---|-----------------------------------|--------------------|
| <i>Core activities</i>    |   |                                   |                    |
| Helpline                  | 20,909                                    | 4,983                             | 25,892             |
| Library                   | 1,953                                     | 831                               | 2,784              |
| Gathering and events      | 58,664                                    | 32,390                            | 91,054             |
| Other pastoral activities | 159,209                                   | 34,882                            | 194,091            |
|                           | <b>240,735</b>                            | <b>73,086</b>                     | <b>313,821</b>     |

**8 Support costs**

|                           | Premises<br>costs<br>£ | Office<br>expenses<br>£ | Other<br>Expenses<br>£ | Total<br>£     |
|---------------------------|------------------------|-------------------------|------------------------|----------------|
| <i>Core activities</i>    |                        |                         |                        |                |
| Helpline                  | 674                    | 4,338                   | 1,766                  | 6,778          |
| Library                   | 112                    | 723                     | 294                    | 1,129          |
| Gathering and events      | 4,383                  | 28,197                  | 11,479                 | 44,059         |
| Other pastoral activities | 4,721                  | 30,367                  | 12,361                 | 47,449         |
|                           | <b>9,890</b>           | <b>63,625</b>           | <b>25,900</b>          | <b>99,415</b>  |
| Fundraising costs         | 1,349                  | 8,676                   | 3,532                  | 13,557         |
| <b>Total 2023</b>         | <b>11,239</b>          | <b>72,301</b>           | <b>29,432</b>          | <b>112,972</b> |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

**8 Support costs (continued)**

**Prior year comparative**

|                           | Premises<br>costs<br>£ | Office<br>expenses<br>£ | Other<br>Expenses<br>£ | Total<br>£    |
|---------------------------|------------------------|-------------------------|------------------------|---------------|
| <i>Core activities</i>    |                        |                         |                        |               |
| Helpline                  | 747                    | 2,869                   | 1,367                  | 4,983         |
| Library                   | 125                    | 478                     | 228                    | 831           |
| Gathering and events      | 4,858                  | 18,646                  | 8,886                  | 32,390        |
| Other pastoral activities | 5,232                  | 20,080                  | 9,570                  | 34,882        |
|                           | <u>10,962</u>          | <u>42,073</u>           | <u>20,051</u>          | <u>73,086</u> |
| Fundraising costs         | 1,495                  | 5,737                   | 2,734                  | 9,966         |
| <b>Total 2022</b>         | <u>12,457</u>          | <u>47,810</u>           | <u>22,785</u>          | <u>83,052</u> |

Support costs have been allocated to activities based on estimated percentages of costs used.  
Governance costs of £3,456 (2022: £2,917) have been included in support costs.

**9 Staff costs and numbers**

**The aggregate payroll costs were:**

|                       | <b>2023</b><br>£      | <b>2022</b><br>£ |
|-----------------------|-----------------------|------------------|
| Wages and salaries    | <b>217,382</b>        | 187,302          |
| Social security costs | <b>14,049</b>         | 11,380           |
| Pension costs         | <b>3,675</b>          | 3,382            |
|                       | <u><b>235,106</b></u> | <u>202,064</u>   |

No employee received emoluments of more than £60,000.  
Benefits paid to key management personnel of the charity during the year were £57,997 (2022: £54,603).

The average number of staff employed by the charity during the financial year amounted to:

|                                   | <b>2023</b><br><b>No</b> | <b>2022</b><br><b>No</b> |
|-----------------------------------|--------------------------|--------------------------|
| Pastoral and befriending services | <u><b>10</b></u>         | <u>9</u>                 |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

**10 Net income/(expenditure)**

Operating surplus/(deficit) is stated after charging:

|                                      | 2023<br>£ | 2022<br>£ |
|--------------------------------------|-----------|-----------|
| Independent examiner's fees          |           |           |
| Accounts preparation                 | 2,076     | 1,840     |
| Independent examination              | 1,380     | 1,223     |
| Trustees' expenses                   |           |           |
| Travel (0 trustees, 2022: 1 trustee) | -         | 132       |

**11 Taxation**

The charity is exempt from corporation tax on its charitable activities.

**12 Comparative Statement of Financial Activities**

|                                       | Unrestricted<br>Funds<br>£ | Restricted<br>Funds<br>£ | Total Funds<br>2022<br>£ |
|---------------------------------------|----------------------------|--------------------------|--------------------------|
| <b>Income from:</b>                   |                            |                          |                          |
| Donations                             | 121,913                    | 186,437                  | 308,350                  |
| Charitable activities                 | 68,831                     | 15,854                   | 84,685                   |
| Other trading activities              | 65,436                     | 1,438                    | 66,874                   |
| Investments                           | 57                         | 14                       | 71                       |
| <b>Total income</b>                   | <u>256,237</u>             | <u>203,743</u>           | <u>459,980</u>           |
| <b>Expenditure on:</b>                |                            |                          |                          |
| Raising funds                         | 64,400                     | -                        | 64,400                   |
| Charitable activities                 | 147,381                    | 166,440                  | 313,821                  |
| <b>Total expenditure</b>              | <u>211,781</u>             | <u>166,440</u>           | <u>378,221</u>           |
| <b>Net income/(expenditure)</b>       | 44,456                     | 37,303                   | 81,759                   |
| <b>Transfers between funds</b>        | 1,513                      | (1,513)                  | -                        |
| <b>Net movement in funds</b>          | <u>45,969</u>              | <u>35,790</u>            | <u>81,759</u>            |
| <b>Total funds as at 1 April 2021</b> | 375,519                    | 56,023                   | 431,542                  |
| <b>Total funds at 31 March 2022</b>   | <u>421,488</u>             | <u>91,813</u>            | <u>513,301</u>           |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

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**13 Tangible fixed assets**

|                                   | Office<br>equipment<br>£ | Total<br>£ |
|-----------------------------------|--------------------------|------------|
| <b>Cost</b>                       |                          |            |
| At 1 April 2022 and 31 March 2023 | 7,322                    | 7,322      |
| <b>Depreciation</b>               |                          |            |
| At 1 April 2022                   | 7,322                    | 7,322      |
| Charge for the year               | -                        | -          |
| At 31 March 2023                  | 7,322                    | 7,322      |
| <b>Net book value</b>             |                          |            |
| <b>At 31 March 2023</b>           | -                        | -          |
| At 31 March 2022                  | -                        | -          |

**14 Debtors**

|                        | 2023<br>£     | 2022<br>£     |
|------------------------|---------------|---------------|
| Income tax recoverable | 36,221        | 42,020        |
| Prepayments            | 3,928         | 3,550         |
|                        | <b>40,149</b> | <b>45,570</b> |

**15 Creditors: amounts falling due within one year**

|                              | 2023<br>£     | 2022<br>£    |
|------------------------------|---------------|--------------|
| Accruals and deferred income | 9,911         | 6,523        |
| PAYE and other taxes         | 4,020         | 1,841        |
| Other creditors              | 2,534         | 435          |
|                              | <b>16,465</b> | <b>8,799</b> |



**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

**16 Commitments**

At 31 March 2023 the charity had minimum total commitments under non-cancellable operating leases as set out below:

|                     | <b>Property<br/>2023<br/>£</b> | <b>Property<br/>2022<br/>£</b> |
|---------------------|--------------------------------|--------------------------------|
| <b>Falling due:</b> |                                |                                |
| Within 1 year       | -                              | 3,384                          |

**17 Movement in funds**

|  | <b>At<br/>1 April<br/>2022<br/>£</b> | <b>Income<br/>£</b> | <b>Expenditure<br/>£</b> | <b>Transfers<br/>£</b> | <b>At<br/>31 March<br/>2023<br/>£</b> |
|--|--------------------------------------|---------------------|--------------------------|------------------------|---------------------------------------|
| <b>Restricted Funds</b>  |                                      |                     |                          |                        |                                       |
| Scottish Forum   | -                                    | 39,416              | (29,575)                 | -                      | 9,841                                 |
| TCF Local support group funds  | 60,358                               | 18,177              | (31,078)                 | -                      | 47,457                                |
| National Lottery Community Fund Grant for the Grief Companions Project | 6,738                                | 18,594              | (25,332)                 | -                      | -                                     |
| Helpline   | -                                    | 12,000              | (12,000)                 | -                      | -                                     |
| Leaflets   | -                                    | 3,550               | (3,550)                  | -                      | -                                     |
| Training   | -                                    | 2,000               | (2,000)                  | -                      | -                                     |
| Siblings   | 14,475                               | 7,000               | (18,677)                 | -                      | 2,798                                 |
| Suicide  | 10,123                               | 14,500              | (14,646)                 | -                      | 9,977                                 |
| Online support   | 69                                   | 14,550              | (6,049)                  | -                      | 8,570                                 |
| Bursaries  | 50                                   | -                   | -                        | -                      | 50                                    |
| Substance use  | -                                    | 3,500               | (3,500)                  | -                      | -                                     |
|  | 91,813                               | 133,287             | (146,407)                | -                      | 78,693                                |
| <b>Unrestricted funds</b>  |                                      |                     |                          |                        |                                       |
| General funds  | 421,488                              | 355,547             | (420,936)                | -                      | 356,099                               |
|  | 421,488                              | 355,547             | (420,936)                | -                      | 356,099                               |
|  | 513,301                              | 488,834             | (567,343)                | -                      | 434,792                               |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

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**17 Movement in funds (continued)**

***Restricted funds***

The Whirlow fund - used to fund an annual retreat for bereaved parents, siblings and grandparents.

The Scottish Forum fund - monies given to finance supportive retreat weekends in Scotland.

The Northern Ireland Branch fund - monies raised for support services for beneficiaries in Northern Ireland.

TCF Local support group funds - monies donated to support TCF's work in particular regions of the UK.

The National Lottery Community Fund Grant for the Grief Companion Project - monies given to TCF to expand the scheme which offers peer befriending to newly bereaved parents.

Helpline - monies given to fund the provision of a telephone and email national helpline for bereaved parents, siblings, grandparents and the professionals supporting them.

Leaflets - monies given to fund provision of supportive publications for the bereaved.

Training - funding for volunteer training and support.

Retreats - monies donated to provide and subsidise weekend and one day supportive retreats for the bereaved.

Siblings - monies to provide support services for bereaved adult siblings (18 years+).

Suicide - monies to provide support services for parents bereaved by suicide.

Online support - funds to enable some services to be delivered online.

Bursaries - monies donated to provide financial assistance to individuals attending retreat weekends and support days.

Substance use - monies provided to support our work with individuals bereaved by drug or alcohol use.

***Designated funds***

The TCF Local support group funds represented monies held by local groups that provide support services to beneficiaries. The trustees reconsidered the allocation of these funds in the prior year and concluded that they should be recognised as restricted funds, so the balance was transferred to the TCF Local Support Group Fund.

The Training and support of volunteers fund represented funds received from a generous legacy. The trustees set these funds aside for a training programme for volunteers which had to be cancelled due to Covid restrictions. The charity is now rethinking its training strategy, so the funds were transferred back to General Funds last year.

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

**17 Movement in funds (continued)**

**Movement in funds - prior year**

|  | At<br>1 April<br>2021<br>£ | Income<br>£    | Expenditure<br>£ | Transfers<br>£ | At<br>31 March<br>2022<br>£ |
|--|----------------------------|----------------|------------------|----------------|-----------------------------|
| <b>Restricted Funds</b>  |                            |                |                  |                |                             |
| Whirlow  | 1,718                      | -              | -                | (1,718)        | -                           |
| Scottish Forum   | 15,415                     | 19,797         | (170)            | (35,042)       | -                           |
| Northern Ireland Branch  | 10,768                     | -              | (505)            | (10,263)       | -                           |
| TCF Local support group funds  | -                          | 53,038         | (38,190)         | 45,510         | 60,358                      |
| National Lottery Community Fund Grant for the Grief Companions Project | 28,122                     | 36,716         | (58,100)         | -              | 6,738                       |
| Helpline   | -                          | 19,950         | (19,950)         | -              | -                           |
| Leaflets   | -                          | 4,350          | (4,350)          | -              | -                           |
| Training   | -                          | 26,500         | (26,500)         | -              | -                           |
| Retreats   | -                          | 4,025          | (4,025)          | -              | -                           |
| Siblings   | -                          | 18,025         | (3,550)          | -              | 14,475                      |
| Suicide  | -                          | 16,223         | (6,100)          | -              | 10,123                      |
| Online support   | -                          | 5,069          | (5,000)          | -              | 69                          |
| Bursaries  | -                          | 50             | -                | -              | 50                          |
|  | <u>56,023</u>              | <u>203,743</u> | <u>(166,440)</u> | <u>(1,513)</u> | <u>91,813</u>               |
| <b>Unrestricted funds</b>  |                            |                |                  |                |                             |
| Designated funds   |                            |                |                  |                |                             |
| TCF Local support group funds  | 10,780                     | 658            | (970)            | (10,468)       | -                           |
| Volunteer training and support   | 75,078                     | -              | -                | (75,078)       | -                           |
| General funds  | 289,661                    | 255,579        | (210,811)        | 87,059         | 421,488                     |
|  | <u>375,519</u>             | <u>256,237</u> | <u>(211,781)</u> | <u>1,513</u>   | <u>421,488</u>              |
|  | <u>431,542</u>             | <u>459,980</u> | <u>(378,221)</u> | <u>-</u>       | <u>513,301</u>              |

**18 Analysis of net assets between funds**

|                            | Other<br>net assets<br>£ | Total<br>2022<br>£ |
|----------------------------|--------------------------|--------------------|
| <b>Restricted funds</b>    | 78,693                   | 78,693             |
| <b>Unrestricted funds:</b> |                          |                    |
| Designated funds           | -                        | -                  |
| General funds              | 356,099                  | 356,099            |
|                            | <u>434,792</u>           | <u>434,792</u>     |

**THE COMPASSIONATE FRIENDS**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**YEAR ENDED 31 MARCH 2023**

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**18 Analysis of net assets between funds (continued)**

**Analysis of net assets between funds - prior year**

|                            | <b>Other<br/>net assets<br/>£</b> | <b>Total<br/>2022<br/>£</b> |
|----------------------------|-----------------------------------|-----------------------------|
| <b>Restricted funds</b>    | 91,813                            | 91,813                      |
| <b>Unrestricted funds:</b> |                                   |                             |
| Designated funds           | -                                 | -                           |
| General funds              | 421,488                           | 421,488                     |
|                            | <u>513,301</u>                    | <u>513,301</u>              |

**19 Company limited by guarantee**

The company is limited by guarantee and as such has no issued share capital. In the event of the company being wound up the liability of the members is limited to £1 each.

**20 Related party transactions**

Trustees waived expenses of £nil (2022: £1,250) during the year.

Other than those disclosed elsewhere in the accounts there are no further related party transactions in either the current or previous year.