



Annual Report and Accounts

**FOR THE YEAR ENDED
31 MARCH 2025**

**Empowering those with visual, sensory impairments
and other disabilities to live a fulfilled and independent
life supporting choices to enable their full potential.**

Company Number 04228432 (England and Wales)
The Wilberforce Trust
Charity Number 1087065

Contents

Page 3	Foreword from the Chair and Chief Executive
Page 6	Report of the Trustees - Our Purpose and Activities
Page 8	Review of the Year
Page 12	Supported Living
Page 16	Our Properties
Page 18	Our People
Page 20	Yorsensory
Page 22	Community
Page 24	Volunteering
Page 26	Club Wilber
Page 28	Fundraising and Fundraising Governance
Page 29	Structure, Governance and Management
Page 32	Financial Review
Page 32	Investment Policy
Page 32	Reserves Policy
Page 33	Environmental, Social and Governance
Page 34	Our Advisors
Page 35	Trustee Responsibility in relation to the financial statements
Page 36	Statement as to disclosure to our auditors
Page 37	Independent Auditor's Report



Foreword from the Chair and Chief Executive

This has been a year of change, not least the Charity's transition to a new CEO.

We remain at capacity across all our locations and have continued to enhance our engagement and co-production efforts with tenants and their families.

We remain committed to new perspectives and ideas to ensure our approach and processes stay ahead of key changes and represent Best Practice in the sectors in which we operate. This approach will continue in the year to come with some further changes and efficiencies we are seeking to implement. We are also pushing ahead to ensure that our commitment to improving the environment and our sustainability credentials continue to evolve. As ever we remain fully committed to creating opportunities for inclusive and accessible communities – this is at the heart of everything we do, just like our Weston's Café at Wilberforce House. We continue to subsidise some of our activities from any surplus we do generate in the spirit of the wider community benefit and drive for inclusivity.

Wilberforce Trust wears many "hats".... we are a supported living care provider, a landlord, a charity, an expert advisor and a hub within and across our local communities. We are seeking to share the stories of all of these different aspects with content directly from those using our services and have used video content to a far greater extent this year towards achieving this aim.

We have worked hard this year to establish a stronger presence across social media platforms to increase awareness of all that we do, as well as continuing to

improve accessibility connected to all our means of communication. The introduction of a partnership with the Royal Association for Deaf People (RAD) through our Yorsensory service has been a key step forward in relation to broader aspects of sensory impairment for people in York.

We are currently in a key transitional phase of our evolution, refreshing some core internal "pillars" that form the foundations of all our operations, in particular:

- **Human Resources (HR)**
- **Finance**
- **Information Technology (IT)**

Improvements and investment in these areas will serve to underpin the next phase of our strategy which will undergo a significant refresh in 2025 now that Wilberforce House is fully bedded in and we reflect on our learnings from its build and operations.

Everything we achieve, we do so in partnership, across all the facets of our activities, whether this is with:

- **Partnerships** - including strong relationships with local authorities, the Sensory Impaired Community and other sensory loss charities
- **Communities** – the public, our supporters, our amazing volunteers
- **Funders** – enabling offers and services such as befriending, creation of our sensory garden and the ongoing success and impact of Club Wilber

Our services and engagement do not come without their challenges. We are operating in an environment of numerous external pressures, challenges within the landscape of Local Authority and central government funding pressures, and against a backdrop of ever increasing demand and competitive environment for high quality social care as well as national continued and recognised challenges for those living with sensory impairment.

For York alone, if the workforce grows proportionally to the projected number of people aged 65 and over then the total number of adult social care posts in the Yorkshire and the Humber region will need to increase by 26% (from 176,000 to 222,000 posts) between 2023/24 and 2040.

Our people are our greatest asset and we have clear intentions within both our HR improvements and on a wider basis to continue to evolve and improve our approach to reward and recognition. Our work is challenging and diverse and our team members work incredibly hard and are truly dedicated to our service users and tenants. We recognise that the job is tough and demanding sometimes and we have signed up to pledges and programmes to continue to improve considerations around mental health wellbeing and menopause. We are also seeking to undertake a refresh of our values via co-production with all team members at all levels to underpin our future strategy and ways of working.

To ensure we have the most robust approach to our strategy, decision making, governance and risk management, we have also continued to evolve our Board of Trustees, saying goodbye and thank you to three members this year and welcoming three new Trustees. We have focussed hard on skill sets and experience that will help to make us stronger and continue to be committed to operating with a diverse Board from a lived experience perspective.

**Ellie Hudson, CEO and
Colin Aspinall, Chair of the Board of Trustees**

"Joining such a long-standing organisation has been a fantastic opportunity for me to combine my experience in working on large scale, fast moving operational environments with my charity and housing roles in recent years. I want to convey my heartfelt thanks to the Chair, Board of Trustees and Management Team for their support during my first year with Wilberforce Trust."

Ellie Hudson

"It has been a pleasure to welcome Ellie to the organisation and to support her as she integrates and makes a significant impact on the Trust. Ellie's experience has introduced a new focus to the Trust, leading to noticeable improvements."

Colin Aspinall



Report of the Trustees

Our Purpose and Activities

The Charity's Objects are:

The provision of accommodation, care, training and other facilities and services to relieve the disabilities of persons with visual impairments, who may have other sensory loss and other physical illnesses, or other physical disorder or disability of mind; and such other charitable purposes for the benefit of disabled persons in Yorkshire and elsewhere in the United Kingdom as the Trustees may from time to time determine.

Our Purpose

Empowering those with visual, sensory impairments and other disabilities to live a fulfilled and independent life supporting choices to enable their full potential.

Aim/Mission

The Trust aims to be a leading provider of high-quality accommodation, professional support, care, specialist equipment, information, and guidance to people with sight loss including those with other disabilities. To encourage and facilitate the development of services, on a local, regional and national basis by being a model of good practice. Our aim is to do this in a way which gives people of all ages choices and enhances their quality of life.

Our Values

Respect and Dignity – Ensure all people who use our services or work in them are treated with respect and dignity, given supportive, inclusive choices and are acknowledged as individuals in an equal and fair way.

Integrity and Honesty – Always do the 'right' thing even if it's hard. Do not settle for others any less than you may want for yourself. Be of sound judgement and truthfulness.

Teamwork – Encourage the contribution of everyone. Communicate effectively, be committed, willing and dependable to each other and the charity.

Empowerment – Encourage all to have confidence with self-development and training. To achieve aspirations for individuals and the charity through having clear goals and objectives.

Continuous Improvement – Continually look at ways to improve the way we do things. Create a quality, safe environment for all our service users and staff. Abide by the codes of practice and agencies that govern us.

Our Strategic Aims and Objectives

- Customer centric
- Empower and develop our people
- Invest and maintain our housing stock
- Qualitative and Quantitative driven outcomes through beneficial customer centric support packages
- Maintain a strong, trusted, reliable brand
- Create public benefit
- Financial sustainability



Image courtesy of Jonny Walton



The trustees have given due consideration to the Charity Commission's published guidance on the Public Benefit requirement under the Charities Act 2011.

Our Public Benefit

Empowering people - We are committed to helping those who have visual impairment (including those with other disabilities) to gain confidence and as much independence as they are able. We are committed to opening opportunities and encouraging people to achieve the aspirations they have for themselves and others.

Contributing to our society - We contribute to the York economy by providing employment for 130 people and are committed to improving people's knowledge of the care and support needs of those with visual impairment and including those with other disabilities, through training and education and by being a rewarding place to work. We have an equal opportunities policy for employment. We invest in providing services and activities to support our purpose, so we can help people at different times of their life to get the support they need at that time. We work to be a model of good practice to facilitate the development of services on a local, regional, and national basis.

Customer needs - Whilst we work with Healthcare and Local Authority agencies to deliver statutory services we also ensure we enhance these. This includes: practical and emotional support for adults, children, families, and supporters; helping to maintain an independent fulfilled life as much as possible; having an ability to reach those people who require a holistic approach to their needs; showing added value to partnership contracts.

The environment - Sustainability of our environment through our operations and working practices is important to us. We are taking steps to minimise our carbon footprint and increasing our recycling and waste management overall. Energy efficiencies and technology form part of our strategy and working policies. The organisation monitors our efficiencies through our Facilities Team and reporting which form part of the Board of Trustee's reports. Our approach to building and planting takes advice from experts to enable biodiversity and natural habitats to thrive.

Review of the Year

167,239
CARE HOURS
PROVIDED

1,338
ONLINE TRAINING
HOURS
COMPLETED

407
RESPONSIVE REPAIRS
CARRIED OUT -
4.5
DAYS
AVERAGE TIME
TO REPAIR

1,423
FACE TO FACE
TRAINING HOURS
COMPLETED

£100K
INVESTED IN
PROPERTY
REFURBISHMENTS

77%
OF STAFF ARE
HIGHLY SATISFIED
WITH THEIR
ROLES

45
TENANTS ACROSS
4
LOCATIONS

68
PROPERTY
REQUESTS -
6.5
DAYS
AVERAGE TIME
TO ADDRESS

89%
OF STAFF ARE
SATISFIED WITH
THE TRAINING
WE PROVIDE

83%
OF STAFF
RATED TEAM
COLLABORATION
POSITIVELY

78%
OF STAFF ARE
SATISFIED WITH
THEIR WORK-LIFE
BALANCE





331
**VOLUNTEER
HOURS**

260
**ATTENDEES TO
ACTIVITIES
WORKING WITH
10
OTHER
ORGANISATIONS**

BEFRIENDING
**323
HOURS**
**38
CLIENTS**

**27
VOLUNTEERS**
**34
NEW
APPLICATIONS**

76
**CLUB WILBER
FAMILIES
SUPPORTED**

142
**CLUB WILBER
INDIVIDUAL
MEMBERS**

15
**CLUB WILBER
SPONSORS**

26
**CLUB WILBER
ACTIVITIES**





YORSENSORY

ENQUIRIES	522
NEW CUSTOMERS	247
PEOPLE REGISTERED	85
ADVICE AND INFORMATION	1360
ASSESSMENTS COMPLETED	122
EQUIPMENT ISSUED	257 PIECES
REHABILITATION CLIENTS	53
FOLLOW UP VISITS	76
HEARING IMPAIRED CLIENTS	150
VISUALLY IMPAIRED CLIENTS	329
DUAL SENSORY CLIENTS	28

LINKEDIN
FOLLOWERS UP
36%
TOTAL IMPRESSIONS
27,721

FACEBOOK REACHING
38K
ACCOUNTS
UP
15%
ON LAST YEAR

**SENSORY
AWARENESS
TRAINING**

9 SESSIONS
3 ORGANISATIONS
89 ATTENDEES
36 HOURS

INSTAGRAM PROFILE
VISITS UP
35%
AND INTERACTIONS
WITH POSTS UP
100%

INSIGHT
244
LARGE PRINT COPIES
1,743
POSTED
3,282
BY EMAIL





Supported Living

Overview

With a strong focus on person-centred care, tenant engagement, and partnership with families and local authorities, we have upheld our commitment to delivering high-quality support that meets the evolving needs of our tenants.

Our services, delivered across multiple sites, continue to reflect best practice standards in the care sector. We're proud to report that all properties were at full occupancy at the time of writing, with a delivery of 167,239 care hours across the last 12 months.

Tenants

Quarterly Tenant Forum

Our Tenant Forum, held quarterly, ensures that the voices of those we support remain at the heart of service delivery.

Activities Survey

In our latest Activities Survey, our tenants were able to express interest in a variety of activity options in the future to ensure we organise what they like the most. We are committed to focussing on engagement to meet their preferences and promote wellbeing.

Care Manager and Link Worker Assignment

Each tenant is assigned a dedicated Care Manager and Link Worker, fostering meaningful, consistent relationships that underpin effective support planning and delivery. Every tenant has individual and widely different care and support needs. Our processes ensure that every individual's plan and approach is truly person-centred.



Families

Annual Family Forums

We held two Family Forums this year, bringing together families, senior managers, and front-line care teams. These events create space for shared learning, feedback, and updates on service improvements.

Family Survey

The annual Family Survey provides valuable insight into the family experience. Results shows strong confidence in the care team, with several families providing commendations, including:

Providing necessary support and treating the tenants respectfully. Listen to the tenants' needs.

Very well organised. Feel confident for our son that he is in good hands.

Providing all tenants with a safe environment.

Good facilities and facility maintenance.

Senior management excellent communication with residents and family and try to run a smooth ship.

Staff are invariably polite and helpful, including care staff, reception, catering staff.

Care Manager Engagement

Families continue to benefit from a designated Care Manager, providing regular updates and a single point of contact for any concerns, enhancing transparency and partnership.



Local Authorities and Funders

Local Authority Engagement

This year included an Engagement Event attended by all key stakeholders. These touchpoints are vital in maintaining a strong relationship and promoting shared goals.

Delivery Forecast

We delivered 167,239 of care and support hours across the year. This figure reflects a consistent demand for services and a complex but well-coordinated staffing model.

Occupancy

All spaces across our housing sites are currently filled, highlighting effective referral management and positive relationships with commissioning bodies.

Partnering Authorities

Our services were delivered in partnership with:

- City of York Council (CYC)
- North Yorkshire Council (NYC)
- Lincolnshire County Council (LCC)
- NHS Continuing Healthcare (CHC)
- Independent Regional Authorities (NIRE)

Cross-Departmental Working

Marketing

We've developed new brochures and service leaflets to support referral processes and family engagement. These materials are used in events and by our partners to promote understanding of our care model.

Activities and Events

Our Activities Team has collaborated across departments and directly with tenants to deliver inclusive, seasonal events going forward, including:

- Quiz (monthly, weekend and evening)
- Sunday Lunch (quarterly)
- Cookery Club (weekday evening)
- Themed Discos (quarterly, weekend and evening)
- Christmas Party, Lunch and Carols (annually)
- Summer Excursion (annually)
- Animal Therapy (ongoing)

These activities reinforce a sense of community, personal development, and emotional wellbeing for all tenants and we will continue to strive to co-produce community activities to ensure inclusion and engagement.



Going Forward

Our focus for the coming year includes:

- Minimising periods with empty apartments or rooms by streamlining referral and onboarding processes, working in close partnership with local authorities and agencies
- Strengthening engagement with tenants, families, and commissioning partners through regular forums and feedback channels
- Enhancing systems for care planning and scheduling





Our Properties

At the heart of everything we do is a deep pride in our properties and a recognition of the vital role they play in the lives of our tenants. We are not simply managing buildings; we are nurturing homes and communities. This belief drives our ongoing commitment to maintaining and enhancing our properties to the highest possible standards.

We understand that effective facilities management is more than bricks and mortar — it's about long-term stewardship, continuous improvement, and ensuring that every space feels like a home. We take our responsibilities seriously, not only in the delivery of core services but in how we embed rigorous compliance and governance throughout our operations.

Co-production continues to be a priority wherever possible, and we are proud to work alongside our tenants to shape services that reflect their needs and aspirations. These collaborative efforts strengthen our relationships and help ensure that our homes are not just well-maintained but genuinely valued by those who live in them.

Ultimately, our aim is clear: to create safe, comfortable, and welcoming spaces where tenants feel secure, respected, and truly at home.

Repairs

Responsive Repair

During the year, a total of 407 responsive repairs were successfully carried out in-house by the Facilities Team. These repairs were managed efficiently, with an average response time of 4.5 days from report to closure. This demonstrates our continued commitment to maintaining high standards of service delivery, ensuring timely resolutions to reported issues, and minimising disruption for building users.

The in-house management of these repairs not only reflects cost-effective resource utilisation but also highlights the team's ability to provide consistent, reliable maintenance support across our facilities. We continue to monitor performance closely and seek improvements in response time and service quality.

Property Requests

In addition to responsive repairs, a total of 68 property requests were completed over the year, with an average turnaround time of 6.5 days. These requests fall outside the scope of standard responsive works and typically include more extensive tasks, such as full redecoration of rooms or entire apartments.



Tenant Feedback

I enjoy living at the Wilberforce Trust very much - I especially enjoy having the evening sun on my balcony.

One thing I really like about living here is that I have my own front door but have my friends living close. I also love that my apartment is so spacious.

I love how spacious my apartment is and how the layout makes it easier for my needs. I enjoy having my own front door if I want peace and quiet but also love that I can go on to the corridors or invite my friends round and socialise if I want to.

Sustainability Initiatives

This year, we've made strides forward in our commitment to sustainability. We're proud to report that all of our properties now meet a minimum EPC (Energy Performance Certificate) rating of C, reflecting our dedication to energy efficiency and environmental responsibility.

Our outdoor spaces have also seen exciting developments. We've introduced a wildflower meadow, expanded gardening clubs, and created allotments for tenants, fostering community engagement and biodiversity. A highlight is our sensory garden, which now runs entirely on solar power thanks to a 50kW solar system and solar-powered equipment—a great example of how green energy can enhance wellbeing.

Inside our properties, we've upgraded boilers and lighting systems to more economical and energy-efficient solutions. We've also made thoughtful changes to our waste and recycling practices. At Weston's Café, used coffee grounds are now recycled for use in our gardens—and we offer them to visitors free of charge to enrich their own green spaces.

Home Improvements

We've reinvested over £100,000 into our properties this year alone, ensuring our homes remain comfortable, modern, and welcoming. This includes the installation of brand-new kitchens in all three of our shared houses located in Tadcaster and Huntington, enhancing both functionality and tenant satisfaction.

Fire Safety Enhancements

Safety remains a top priority. At our Huntington property, we've installed sprinkler systems to provide an added layer of protection. Meanwhile, our Tadcaster properties now feature state-of-the-art fire panels, ensuring our homes are not only safe but equipped with the latest technology to protect both tenants and staff.



Sensory Garden

The sensory garden was funded by local individuals, businesses and a collective of community donations creating an inviting outdoor space that enables all of our tenants, visitors and staff to enjoy nature whilst sitting in the middle of our wildflower meadow.

Our People

This last year has seen significant change as we said farewell to our previous long-standing CEO, Philippa Crowther and welcomed Ellie Hudson.

Change can be challenging for many, but it also serves as a catalyst for growth. It has sparked meaningful conversations and strengthened collaboration between teams, creating a sense of unity as we navigated new beginnings together.

Staff engagement:

Over the past year, we continue to prioritise listening to our staff through a variety of feedback methods, most notably our annual team member survey.

The annual team member survey was conducted in June 2024, achieving a response rate of 50%, a notable increase from the previous year. The survey captured valuable insights across key themes including job satisfaction, leadership, communication, wellbeing, and inclusion.

Key findings included:

77% of respondents are highly satisfied with their roles

89% of staff are satisfied with the training we provide

83% of staff rated team collaboration positively

78% of staff are satisfied with their work-life balance

Areas identified for improvement included: reward and recognition, internal communications and career development opportunities. In response our Reward and Recognition programme is undergoing a full revamp with a refreshed approach launched in summer 2025 to celebrate better staff contributions and milestones. Our staff turnover rate is good in relation to industry and region levels but there is always room for further improvement and we are hopeful that a number of engagement activities will see direct impact on our ongoing retention levels.

We are also strengthening internal communications, ensuring that information is more timely, transparent, and accessible across all teams. Additionally, we are exploring new pathways for staff development, with a focus on fair access to training, clearer career progression routes, and greater support for professional growth. These initiatives reflect our commitment to turning feedback into meaningful action and creating a workplace where everyone is heard. In addition we will be making plans to improve team member engagement in the survey in 2025 and beyond.

We have introduced a flexible and hybrid working policy allowing staff (with suitable roles) to work remotely if they wish and more flexibility with start and finish times.

Notable achievements:

- Welcomed 10 nursing students on placement - strengthening our commitment to supporting the next generation of healthcare professionals.
- Commitment to Menopause Workplace Pledge.
- Mental Health at Work Commitment, in association with MIND.
- Successfully completed our first full year of providing dedicated HR support to Visionary, a vital membership organisation for visual impairment charities across the UK.
- Achieved Disability Confident employer status.



Yorsensory

Our core aim to support those with sensory loss to fully integrate and participate in society was delivered across the YorSensory Team throughout the year.

We positively influenced service delivery and specification before going on to win the contract to deliver the Sensory Support Hub in the City with the addition of Children and Young People's mobility being the notable change to the core deliverables. Demand for adult services, in the form of enquiries, took a slight downturn. However, the ratio of enquiry to assessment increased from approximately 30% in 2023-2024, to 49% in 2024-2025. Vision rehabilitation demand decreased by 24% year on year suggesting that we are meeting people earlier on their sight loss journey. The team received referrals from 42 different sources, including several hospital teams, other charitable organisations and higher education settings. This is testament to the team raising awareness of our services as for the last six months of the year we were without a dedicated Outreach worker.

We started to deliver the Children and Young People's Orientation and Mobility service in October 2024, to ensure that each Child and Young Person with a visual impairment in York is able to develop the independent living skills they need to thrive. We worked with the Specialist Teaching Team and the Commissioners to highlight the need for secure specification for this element of the service.

Key achievements:

- Winning the new Sensory Support Hub Contract
- Achieving **100%** on service being excellent in feedback January-March.
- Collaborated with the Royal Association for Deaf people to bring advice service to York in British Sign Language.

Thank you for all your help this morning. It was very useful being able to try out equipment.

That's unbelievable, I'm so pleased. It literally means I can open the door to the outside world now! I cannot thank you enough for the difference your visit has made to my life. Thank you.

Whilst I knew about the Wilberforce Trust, I didn't know how your services operated particularly in relation to hearing support, offering advice and guidance on potential products. It is with some relief that I've located your Sensory Hub on this. When I left you this morning, I felt a sense of hope and optimism that has been absent since May. Many thanks once again and know that your work is much appreciated.



Community

Over the past year our Community Services directly supported over 100 clients, and by working with a number of other organisations, we indirectly reached many more. Our befriending service undertook a holistic review in October 2024, the introduction of a volunteer led programme will ensure sustainability and efficiency and that clients will no longer be subject to breaks in support. This included a thorough update of all documentation and the development and introduction of Befriending Training for volunteers.

Our Sensory Awareness Training uptake reduced on the same time last year, however, we still reached two other organisations. Our work with both Spire and Priory private hospitals gave our team a platform to build our new Sensory Awareness Training Video. Julie Day, Sensory Awareness Training Officer also used her time to provide her professional opinion in the York Access Forum, with notable achievements of:

- Influencing the design of the York Station Gateway to make it safer for visually impaired people to navigate that
- Highlighting to planners the consideration of disabled travellers' needs and views in Active Travel strategies.
- Encouraging City of York Council (CYC) to adopt a Supplementary Planning Document to provide guidance in implementing York's Local Plan, especially for disabled people.

As part of our commitment to continuous improvement we have completed a cross departmental survey of the activities offered to tenants in the Living and Learning Zone (LLZ). This has now been reviewed and is ready for implementation in the summer of 2025. We have also reviewed our marketing and audiences for sessions open to the community in the LLZ.

Key achievements:

Our rehabilitation professionals continued to provide support outside of our core contractual work with City of York Council. Over the year we have provided support to Galloways Society for the Blind, working on their contract with Sefton Council to reduce their Vision Rehabilitation waiting lists and improve their offer while re-contracting. We were part of a group who supported a cohort of Ukrainian health and education professionals through a scheme supported by the World Health Organisation and Blind Veterans here in the U.K. following our 2024 hosting of a group of visually impaired Ukrainian students and their teachers. We provided them with detailed information and videos on our rehabilitation, Yorsensory services and Club Wilber in order to better inform rehabilitation services and pathways in Ukraine in the future.

During the Sensory Support Hub negotiations we identified a need for an advice service for British Sign Language users, which was not detailed in the specification. However, we worked closely with Royal Association for Deaf people to bring this service to the Deaf community in York. It commenced in late February and we look forward to seeing it progress.



The excellent training delivered by the fabulous team was funny, engaging and seriously impactful. The take home sentiments for our team, were how humbled and impressed we were having now gleaned some personal experience of just how daunting it might be for anyone to navigate life whilst living with a visual impairment, never mind visiting a hospital.

This service has had a most positive outcome for me. The regularity, reliability and company has been of sincere assistance.

Another great example of two charities coming together to deliver vital services to blind and partially sighted people in our community!
Thank you, we have achieved so much together in the last 12 months and Cathy has been a great addition to the team.

Hasanga Parkinson
Galloways Society for the Blind



Volunteering

In 2024/25, our amazing volunteers continued to provide vital support across our services. Befriending, whether with those adults/service users who need a little more support, with Club Wilber and the partnership with York's Specialist Teaching Team to provide a play group and a cooking club after school, and with our internal activities including those offered in the Living and Learning Zone (LLZ) and by Club Wilber.

In 2024 one of our incredible volunteers celebrated their 25 year milestone and another celebrated 15 years. In order to replicate this kind of dedication we have developed a retention strategy, to ensure that volunteers feel truly valued, and have ample opportunity for training and support to continue their journey and development with us.

Our volunteer coordinator has developed stronger working relationships with local universities and other volunteer centric organisations which has enabled the streamlining of training and onboarding, the updating of policies and procedures and a future proofed pathway for further evolution next year.

Key Achievements:

- Volunteer coordinator completed Mental Health First Aid Training
- Key recruitment and retention improvements to safeguard and nurture our volunteer base
- Volunteer onboarding process streamlined and improved which has increased participation

Our volunteers this year contributed:

- **99.5** hours to Club Wilber
- **29.5** hours to Fundraising
- **63** hours to Marketing
- **70.5** hours to Befriending
- **68.5** hours to LLZ



It felt warming to enable someone that might be lonely to have someone to talk to and I'm looking forward to getting to know them.

As a volunteer I cannot tell you the reward you get from helping out, it is special, and so is a nice Thank You!

I think the trust is a great place and I'd recommend volunteering there to everyone if they have spare time.

We had a fabulous evening, the children's faces were amazing to see, you guys as a team are superb and such lovely people.



Club Wilber

Understanding the needs, interests and desired outcomes of all of the children, siblings, parents and professionals is fundamental to the success of Club Wilber. This year we have continued to progress on parent empowerment, engagement and relationships, especially with a change of Club Wilber coordinator.

This year Club Wilber took our members on some of their biggest adventures yet, in our mission to provide adapted, inclusive, supportive and fun activities for the young people and their families. Activities offered at a subsidy or even free of charge allow families to spend time together in a stress free and like minded environment. There were seasonal activities a plenty, as usual - the outstanding events of the year were Sam's Safari, Alton Towers and Forest Schools.

On top of the activities above, we also delivered Christmas advent calendars and Santa letters to all young people who wanted one. Both items were made accessible by us - Advent calendars had braille stickers on the doors, and for children who cannot take food orally we created picture calendars. Santa letters were standard print, large print, sensory with simplified language, or braille, generously translated for free by Club Wilber sponsor PIA.

Key Achievements:

- **100% of families said they would recommend Club Wilber to other families with children with a visual impairment**
- **100% of families said Club Wilber has had a positive impact on their family life**
- **Subsidised 'big trip' to Alton Towers**

Thank you to all our amazing sponsors who make the work we do with Club Wilber possible:



CLUB
WILBER





Having Club Wilber stay in touch stops me feeling isolated as a parent, by having an organisation who understands visual impairments, it means if I need support I know where to turn now.

We had a lovely day thank you so much. It isn't a trip we would have probably taken on our own as I don't do rides!!

As a whole family we love Club Wilber, they provide fantastic opportunities to socialise and enjoy inclusive activities.

Keep doing what you are doing!! Thank you very much.

I feel like I have someone I can turn to, WE can turn to, if/ when needed.

Fundraising and Fundraising Governance

Our fundraising activities are reviewed annually by the Board of Trustees to ensure transparency and accountability. All activities are undertaken by our employees and volunteers; we do not use external agencies. We use recognised platforms such as Local Giving to support fundraising efforts. The Trust is registered with the Fundraising Regulator and has committed to its Code of Fundraising Practice, ensuring all activities are legal, honest, open, and respectful. We also voluntarily comply with relevant fundraising standards and good practice guidance, including those previously set by the Fundraising Standards Board (FSB). In addition, we adhere to General Data Protection Regulation (GDPR) requirements when handling donor information, and risk assessments are carried out for all fundraising events to ensure the safety and wellbeing of participants and supporters.

Fundraising

We are extremely grateful to all our supporters who helped us to raise £14,282 through donations, sponsorship and events, and fundraising on our behalf. We would like to particularly thank the Gild of Freemen of York who chose us as their charity of the year July 2024 – June 2025, the St Andrew's Society who did the same for 2023/24, Haxby and Wigginton Scarecrow Festival, York Ainsty Rotary for the Santa Float and help with additions to the sensory garden and Copmanthorpe Women's Institute.

Our community projects, such as our Befriending project need specific grant funding in order for them to happen. Clients of our Befriending project are usually elderly people who are left feeling isolated and lonely due to their sight and/or hearing loss. Being unable to see and/or hear causes major problems with communication, with clients often getting to the

point where they choose to avoid it. In the same way someone who is frail and has poor vision can become very nervous about leaving the house due to the increased possibility of bumping into things or falling. Our service ensures these incidents of isolation are significantly reduced, offering regular interaction and activities of a clients choosing.

This year we have supported clients to de-clutter and organise their home, go on walks safely around the local area and been a much needed friendly face.

Thank you to all the organisations and Trusts who have supported us this year:

The Powell Family Foundation

Arlish and Chambers

Sylvia and Colin Shepherd Foundation

Happy Days

Ed De Nunzio Foundation

Co-op Local Community Fund

York Common Good Trust

British Science Week

RADAR

Boshier Hinton Foundation

Norman Collinson Charitable Trust

Hospital Saturday Fund

Earl Fitzwilliam Charitable Trust

W L Pratt Charitable Trust

Peter Sowerby Foundation

Skipton Building Society

Structure, Governance and Management

Safeguarding

Strict processes and procedures are in place to manage safeguarding. As a provider of Adult and Social Care, our aim is to deliver the highest level of quality support, care, and safety. To do this we ensure that our Trustees and staff are trained at a high-level including sight and hearing loss. Our processes and procedures must meet or exceed those standards as set down by section 20 regulations of the Health and Social Care Act 2008 (Regulated Activities) Regulations 2014. Our aspiration is to be the best, safest, most effective provider where customers, families and carers feel confident to receive services from Wilberforce Trust. The events and children's area are covered under our safeguarding policies and staff are appropriately trained. We have a named Safeguarding Officer.

Our Quality Assurance is designed within the Care Quality Commission (CQC), City of York Council (CYC), North Yorkshire Council (NYC) frameworks to support planning delivery and monitoring along with continuous improvement of all the support and care we provide. The Trust puts quality, safety and our clients first in everything we do, and everything is measured and monitored against the standards as set down by external auditors, reviewed each quarter by the Compliance, Governance and Care Committee.

Structure

The names of the current Trustees are listed within this report. The organisation is a not-for-profit charity and any surplus generated is used for the objects of the charity. No Trustee is appointed to any office of the charity paid by salary.

The charity has a Chief Executive and Finance Director. The Management Team run the day-to-day operations, including business support areas in HR, Fundraising, Property and IT, Housing, Care, Compliance and Training, and other services under the Yorsensory banner i.e. rehabilitation, technology and equipment for disabled users, and other activities for learning and fun for babies, children and young adults. The organisation has a fundraising department and a volunteer department.

The Chairman meets the Chief Executive monthly, to review the operational core activities and the financial position of the charity.

The Board of Trustees' meet as a full board quarterly.

Two subcommittees meet on a quarterly basis and report and make recommendations to the full Board of Trustees meeting.

Sub-committees:

- The Finance and People Committee (F and P) of three Trustees and Executives meet quarterly.
- The Compliance, Governance and Care Committee of two Trustees, Executive and services team meet quarterly.
- Project committees are used for specific items as and when deemed appropriate by the Trustees, made up of selected Trustees and personnel.

Composition:

A quorum of at least two Trustees is required for Sub-committees.

A quorum of not less than five members is required for a Trustee Board Meeting.

Trustees

A detailed skills matrix is in place and Trustees complete this each year. The matrix itself is reviewed against our future strategy at each strategy session to ensure it aligns with what the organisation needs in terms of key skills sets in the future.

While we have a Trustee with lived experience of those that we serve, we hope to strengthen this representation in the future.

When a vacancy occurs or is due to occur, the Chief Executive Officer (CEO) and Trustees seek through differing media including social media, to identify and attract potential recruits who will match the required skills and who will complement the Board structure and dynamic overall.

Potential Trustees are asked formally to apply with a CV, formally interviewed by the Chief Executive and a second interview by the Chairman or another Trustee. Candidates are assessed as to their suitability to act as a Trustee, whilst the organisation carries out the required checks. If the candidate is deemed suitable the Chairman will invite the candidate to attend a Board Meeting to act as an observer if there is one scheduled. Following the candidate's expression of willingness to act as a Trustee, the Chairman will formally propose them to the full Board Meeting to approve. On this approval they will then be invited to join the Board of Trustees and will be formally accepted at the following Annual General Meeting (AGM).

Trustees may co-opt members for specific duties and periods onto the Board, where full appointment as a Trustee is not appropriate.

New trustees undergo an induction process to brief them on their legal obligations under charity and company law, the content of the Articles of Association, the committee and decision-making processes, the strategic priorities and recent financial performance of the charity. During this process they meet key employees and other trustees. Trustees are encouraged to attend appropriate external training events where these will facilitate the undertaking of their role.

Trustees are offered a range of training which includes key mandatory, financial and governance aspects as per Charity Commission recommendations, but also a range of topics linked to all our activities and to align with our strategic priorities. Training needs are reviewed annually. We facilitate visits to Wilberforce Trust premises to review services, effect introductions to Trust staff and service users and meet with the Trust Chairman and CEO. A Trustee pack is given to all new Trustees, including all charity commission information, declaration of conflict of interest and governance documentation. All Trustees, Executives and staff are DBS (Disclosure and Barring Service) checked and only take up duties after clearance.

Pay reviews for the charity's key management personnel take into account the current and projected short-term economic outlooks, projected income streams and limitations from services provided and are benchmarked against key care and charity sector norms and reports relevant for the Yorkshire and Humberside region.

Risk Management FRS102

The potential risks faced by the Trust have been evaluated across the charity by the management team and Trustees and formally recorded. A risk register and conflict of interest register are working documents held and administered by the CEO and Head of Compliance. The register is formally reviewed by the Finance and People Committee Committee and highlighted to the Board of Trustees, and data and actions approved quarterly. Appropriate actions, systems and procedures are put into place to avoid and mitigate risks. This involves identifying the type of risks the charity faces, prioritising them in terms of potential impact and likelihood of occurrence and identifying means of mitigating the risks. The Board of Trustees also review horizon risks periodically.

FRS102 is a financial reporting standard relevant for entities that are not profit oriented. This involves identifying the type of risks the charity faces, prioritising them in terms of potential impact and likelihood of occurrence and identifying means of mitigating the risks.

As part of this process the Trustees have reviewed the adequacy of the charity's internal control systems and consider that they conform to guidelines issued by the Charity Commission. A risk register is maintained on an ongoing basis.

The principal risks within the risk register include those relating to workforce capacity, quality and availability, cyber and IT challenges, potential impact to future income and new and changing legislative requirements. To mitigate against the workforce capacity risks the management have developed and monitored training matrices to ensure adequacy of skills and have a referral scheme for employees successfully introducing applicants for available positions. We have also commissioned an independent review against existing Care Quality Commission (CQC) requirements, albeit we are aware that the assessment framework may imminently change. We continue to monitor this closely. In relation to cyber and IT we are imminently changing our IT provider to ensure we have strong controls and will be pursuing additional cyber credentials and phishing exercises as part of this transition. Income streams are reviewed to ensure we continue to maintain independence and sustainability of care and housing separately. In relation to future legislation we have recently commissioned a review of our tenancy documentation including an impact assessment of those areas of legislation currently under consultation.

Numerous audits are conducted on an ongoing basis against all aspects of our operations and we have comprehensive insurance coverage.

We are externally audited by CQC, for regulatory care compliance and NHS Continuing Healthcare (CHC), City of York Council (CYC) and North Yorkshire Council (NYC) against quality standards for health and social care and our financial auditors HPH.

Financial Review

The Trustees are pleased to present their report together with the financial statements of the charity for the year ended 31st March 2025. Legal and administrative information as set out forms part of the overall report. The financial statements comply with current statutory requirements, the Memorandum and Articles of Association, SORP (Statements of Recommended Practice) and the public benefits reporting requirements, and the Charities Act 2011.

Following review, HPH auditors have expressed a wish to remain as The Wilberforce Trust auditors and have been appointed by the Board of Trustees. This is the last year that HPH will act as our auditors and we thank them for their service and support.

Constitution

The Wilberforce Trust is a company limited by guarantee and a Registered Charity governed by its Memorandum and Articles of Association. The date of incorporation was 4th June 2001.

Governance of Other Charities

Under an order from the Charity Commissioners dated 22nd August 2002 the Wilberforce Trust is the Trustee for the Wilberforce Home for the Blind. This fund is included in the financial statements of the charity and is now fully incorporated into the Permanent Endowment Fund following the Charity Commissioners decision effective 4th March 2005.

Investment Policy

Julius Baer manages the Trust's investment portfolio and act as our Investment Advisers.

The Trustees provided our Investment Managers with a preference for income generation for the equity component of the investment portfolio. This investment therefore concentrates on income producing companies, both stable and growing dividends. Our Investment Management company use a structured data-driven screening process across all aspects of Environmental, Social and Governance risk towards ensuring sustainable investment choices for the Trust. The Trustees do not set specific performance objectives at present, monitoring the outcomes on a periodic basis but our investment approach is under review at present and this may change in the following financial year.

The Trust's investment aims are:

- To create sufficient financial return to enable the Trust to carry out its purposes effectively and without interruption and:

- To create sufficient surplus to meet the needs and enhance current services, create new services as applicable for those people we serve and:
- To maintain and, if possible, enhance the value of the investment funds.

The Trustees' policy therefore is, on the advice of the Trust's Investment Managers, to invest in an appropriate mix of real assets, i.e. equities, fixed interest, and monetary assets to achieve these aims. The Trustees avoid investing the fund in ways they believe would counter the charity's work. They work with their fund manager on the investment approach and review this periodically. The investment managers are required to present their reports bi – annually in order that the Trustees can monitor performance.

Reserves Policy

The Trustees continue to believe that a free reserve (excluding the Permanent Endowment) equivalent to two years cover of the charity's overhead provides adequate security for the Trust, protects its staff and the time it takes to rehouse and resettle tenants and care teams. This currently implies a reserve of approximately £1m.

Environmental, Social and Governance

As a charitable organisation, we ensure surplus funds are invested back into providing services and activities to support our purpose, so we can help people at different times of their life to get the support they need at that time. We develop and publish Impact Reports to prove our output, successes and encourage supporters.

Environmental:

Sustainability of our environment is important to us. Having well maintained, energy efficient buildings and facilities and taking steps to minimise our carbon footprint form our green strategy and working policies. Increasing our recycling and waste management, reducing our paper use by using online storage and encouraging sustainable travel amongst our staff are a few examples of our commitment to more sustainable services. Energy efficiency monitoring takes place as part of the Trustee Board reporting. Our Wilberforce House base has solar panelling to use energy more efficiently and was built to a standard that considered environmental materials, and provides vast open, enriching spaces which include a Sensory Garden.

The demographic of people supported across sensory services is generally ageing, which means that the equipment we issue is often returned to us. We are unable to re-issue this due to warranty periods and cross contamination. We sought out an effective recycling programme, firstly trying to 'pay it forward' by gifting equipment to clients who declined assessment, secondly by donating the surplus stock to charity shops. Research led us to the wonderful work done by PhysioNet who identify, collect, repair and prepare various aids for daily living and ship them to low and middle-income countries around the world. We have donated over 30 pieces of equipment over the past year.

Our raised beds and 'Sow and Grow' project was designed to restore and create natural habitats on our grounds. Throughout our Sensory Garden and gardening areas we have created natural habitats that support existing, and encourage new, wildlife and create additional biodiversity in our local area. Our grounds are an ecological haven in a heavily built up area. The planning and construction of these facilities focussed on the use of pollinating plants, to create pollinator corridors and although the Sensory

Garden is now 'building' complete we are working hard to include new, accessible additions such as bug hotels and interactive bird song boards.

Social:

As long-standing members of the community, we are committed to bringing positive change to York people, through providing opportunity for unparalleled support, stable and sustainable employment and creating a self-reliant community base amongst our customers and beyond. We understand the benefits social value provides, which can aid the recovery of local communities and economies, especially through employment, re-training and return to work opportunities, community support, developing new ways of working and supporting the holistic needs of its customers.

As an organisation with a wide range of touchpoints and activities, each one is committed to identifying and implementing practical ways to achieve the highest standards of accessibility and inclusion. We recognise that our communities are diverse and understand the importance of offering Outreach services, face to face opportunities, accessible communication and activities and using accessibility as a measure of social sustainability.

We contribute positively to our communities beyond our direct work with clients, the tender written to win the Sensory Support Hub provision included direct quotes and improvements as fed back from our clients. The development of the Befriending service and activity provision is all directed from clients.

Governance:

As an organisation we know that there is added value in working collaboratively, whether that be with our peers, other organisations, local authorities or by building long term partnerships to support our clients. Much of our work in the community is unachievable without an element of partnership working. We are thankful to all the organisations who we had the pleasure of working with, including but not limited to York Access Forum, Blind Veterans UK, Galloways, World Health Organisation, Royal National Institute of Blind People, Visionary, York Centre for Voluntary Services and Royal Association for Deaf people.

Our Advisors

Directors, Trustees and Advisors

The directors of the charitable company (“the charity”) are its Trustees for the purpose of the Charity Law and throughout this report are, collectively referred to as the Trustees.

Colin Aspinall (Chairman), Charles Anelay, Andrew Knowles, Anne Mwangi, Maria Robinson, Stuart Young, Stephen Cluderay (resigned November 2024), Simon Cowell (resigned November 2024), Sue Hawkesworth (resigned November 2024), Jane Carter (resigned May 2024), Beth Wallace (appointed July 2024), Kate Thompson (appointed July 2024) and Philippa Crowther (appointed July 2024).

PATRON:	Dame Judi Dench
COMPANY SECRETARY:	Eleanor Hudson (appointed July 2024) Philippa Crowther (resigned July 2024)
EXECUTIVE MANAGEMENT:	Eleanor Hudson - CEO
COMPANY REGISTRATION NUMBER:	4228432
CHARITY REGISTRATION NUMBER:	1087065
PRINCIPAL OFFICE:	Wilberforce House The Grove York YO24 1AN
BANKERS:	Barclays Bank plc Parliament Street York YO1 1XD
INVESTMENT ADVISERS:	Julius Baer 1 Globe Road Leeds LS11 5FD
AUDITORS:	HPH Chartered Accountants 54 Bootham York YO30 7XZ



Trust's Responsibility in relation to the financial statements

The Trustees are responsible for preparing the Wilberforce Trust's report and financial statements in accordance with applicable law and regulations. Charity law requires the Trustees to prepare financial statements for each financial year in accordance with United Kingdom Generally Accepted Accounting Practice (United Kingdom Accounting Standards and applicable law). Under charity law the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing these financial statements, the Trustees are required to:

Select suitable accounting policies and apply them consistently.

Make judgements and estimates that are reasonable and prudent.

State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

Prepare the financial statements on the going concern basis unless it is appropriate to presume that the charity will continue in business.

The Trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011.

They are also responsible for the safeguarding of assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

A Trustee owes duties of honesty, integrity, loyalty, and good faith to the beneficiaries of the trust. They must act exclusively in the best interests of the trust and be actively involved in any decisions.

Financial statements/ annual reports are published on the charity's website (www.wilberforcetrust.org.uk) in accordance with legislation in the United Kingdom governing the preparation and dissemination of financial statements. The maintenance and integrity of the charity's website is the responsibility of the Trustees. The Trustees responsibility also extends to the ongoing integrity of the financial statements contained therein.

Statement as to disclosure to our auditors

Financial Review

The Trust continued to pursue strong financial management during the year. Operational income is contractual from housing and supported living, investment dividends, fundraising and grants. The Trust has sufficient resources to be in a position to weather the current economic uncertainties and volatility.

Operational income in the year £5.4m (2024: £5.1m), yielding a surplus on operations of £441k (2024: surplus of £423k) with investment income contributing £171k (2024: £186k), £1.7m was added to reserves (2024: £631k) including £469k of gains in financial investments (2024: £208k) and £796k of gains on revaluation of fixed assets (2024: £nil).

Operating costs, including funding activities, were £4.9m (2024: £4.6m)

When revalued for reporting purposes, our investment portfolio showed, in line with global stock market changes, an unrealised gain of £114k (2024: £208k). Existing investment properties (previously included at nil value) were also valued in the year resulting in a further unrealised gain of £355k.

Cashflow was positive at £525k from operations supported by financial investment returns of £160k.

Total Funds at the year end stood at £17.4m. These funds included Unrestricted General Funds of £4.2m, Unrestricted Designated Funds of £6.2m, Restricted Funds of £0.1m and Permanent Endowment Funds of £6.9m.

Reserves

The Trustees continue to believe that a free reserve (excluding the Permanent Endowment) equivalent to two years cover of the Charity's overhead provides adequate security for the Trust, protects its staff and the time it takes to rehouse and resettle tenants and care teams. This currently implies a reserve of approximately £1m. The free reserves figure at the year end exceeded this amount at £4.2m.

We are currently carrying a higher level of reserves pending further exploration of an additional build project to add further capacity at Wilberforce House. Once we have finalised costings and feasibility, we will designate funds as appropriate in accordance with SORP and our reserves and investment policies. We do not have a confirmed timeline at this point for this project.

SIGNED ON BEHALF OF THE TRUSTEE BOARD



Colin Aspinall (Chairman)

11 November 2025

HPH**Chartered Accountants****INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF THE WILBERFORCE TRUST****OPINION**

We have audited the financial statements of The Wilberforce Trust (the 'charitable company') for the year ended 31 March 2025, which comprise the Statement of Financial Activities and Income and Expenditure Account, the Balance Sheet, the Cash Flow Statement and the related notes, including significant accounting policies. The financial reporting framework that has been applied in their preparation is 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 Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2025 and of the charitable company's incoming resources and application of resources for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

BASIS OF OPINION

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

CONCLUSIONS RELATING TO GOING CONCERN

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

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

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

OTHER INFORMATION

The trustees/directors are responsible for the other information contained within the annual report. The other information comprises the information included in the Annual Report, other than the financial statements and our Auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

HPH**Chartered Accountants****INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF THE WILBERFORCE TRUST****OPINION ON OTHER MATTERS PRESCRIBED BY THE COMPANIES ACT 2006**

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Trustees' report, which includes the directors' report, prepared for the purposes of company law, for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report included within the trustees' report have been prepared in accordance with applicable legal requirements.

MATTERS ON WHICH WE ARE REQUIRED TO REPORT BY EXCEPTION

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report included within the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.
- the trustees were not entitled to prepare the financial statements in accordance with the small companies regime and take advantage of the small companies exemption in preparing the trustees' report.

RESPONSIBILITIES OF DIRECTORS

As explained more fully in the trustees' responsibilities statement on page 7 the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

AUDITOR'S RESPONSIBILITIES FOR THE AUDIT OF THE FINANCIAL STATEMENTS

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an Auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

- We obtained an understanding of the legal and regulatory frameworks within which the company operates, focusing on those laws and regulations that have a direct effect on the determination of material amounts and disclosures in the financial statements. The laws and regulations we considered in this context were the Companies Act 2006 together with the Charities SORP (FRS102). We assessed the required compliance with these laws and regulations as part of our audit procedures on the related financial statement items.



HPH**Chartered Accountants****INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF THE WILBERFORCE TRUST**

- In addition, we considered provisions of other laws and regulations that do not have a direct effect on the financial statements but compliance with which might be fundamental to the charitable company's ability to operate or to avoid a material penalty. The laws and regulations we considered in this context were Care Quality Commission, Health and Safety legislation, Employment legislation, Charity Commission regulations and General Data Protection Regulation (GDPR).
- Auditing standards limit the required audit procedures to identify non-compliance with these laws and regulations to enquiry of the Trustees and other management and inspection of regulatory and legal correspondence, if any.
- We also considered the opportunities and incentives that may exist within the charitable company for fraud.
- We identified the greatest risk of material impact on the financial statements from irregularities, including fraud, to be the override of controls by management and income recognition.

In response to the risk of irregularities and non-compliance with laws and regulations and risk of fraud, we designed procedures which included but were not limited to: sample testing on the posting of journals, timing of recognition of commercial income, review of trustee's minutes and any correspondence with regulators.

Owing to the inherent limitations of an audit, there is an unavoidable risk that we may not have detected some material misstatements in the financial statements, even though we have properly planned and performed our audit in accordance with auditing standards. We are not responsible for preventing non-compliance and cannot be expected to detect non-compliance with all laws and regulations. These inherent limitations are particularly significant in the case of misstatement resulting from fraud as this may involve sophisticated schemes designed to avoid detection, including deliberate failure to record transactions, collusion, or the provision of intentional misrepresentations. We are not responsible for preventing fraud and cannot be expected to detect all fraud.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our Auditor's report.

USE OF OUR REPORT

This report is made solely to the charitable company's members in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an Auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members for our audit work, for this report, or for the opinions we have formed.

Sarah Wearing

.....
Sarah Wearing (Senior Statutory Auditor)

For and on behalf of HPH, Statutory Auditor

54 Bootham
York
YO30 7XZ

25 November 2025

THE WILBERFORCE TRUST
STATEMENT OF FINANCIAL ACTIVITIES
AND INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2025

	Note	Unrestricted	Restricted	Permanent	Year ended	Year ended
		General Fund £	Designated Funds £	Endowment Funds £	31 March 2025 £	31 March 2024 £
Income and endowments from:						
Donations and legacies	2	8,470	-	-	28,799	62,209
Charitable activities	3	5,107,182	-	-	5,128,375	4,696,316
Other trading activities	4	38,710	-	-	55,934	85,418
Investments	5	171,393	-	-	171,393	186,194
Other income	6	-	-	-	-	25,000
Total		5,325,755	-	-	5,384,501	5,055,137
Expenditure on:						
Raising funds	7 - 9	71,780	-	12,612	84,392	60,397
Charitable activities		4,584,656	176,977	23,667	4,859,564	4,571,901
Total		4,656,436	176,977	36,279	4,943,956	4,632,298
Net income/(expenditure) and net movement in funds						
before gains on investments		669,319	(176,977)	(36,279)	440,545	422,839
Net gains on investments	12	63,141	-	406,660	469,801	208,461
Net income/(expenditure)		732,460	(176,977)	370,381	910,346	631,300
Transfers between funds	17, 18 & 19	5,133	(5,133)	-	-	-
Other recognised gains:		-	404,933	390,669	795,602	-
Gains on revaluation of fixed assets for charity's own use		-	404,933	390,669	795,602	-
Net movement in funds		737,593	222,823	761,050	1,705,948	631,300
Reconciliation of funds:						
Total funds brought forward		3,496,361	6,020,844	6,135,079	15,705,976	15,074,676
Total funds carried forward		£ 4,233,954	£ 6,243,667	£ 6,896,129	£ 17,411,924	£ 15,705,976


The notes on pages 43 to 56 form part of these financial statements.

THE WILBERFORCE TRUST
(Registration number: 4228432)

BALANCE SHEET
AS AT 31 MARCH 2025

	Note	2025		2024	
		£	£	£	£
FIXED ASSETS					
Tangible Fixed Assets	10		10,229,867		9,595,042
Investments	12		5,965,433		5,523,659
			<hr/>		<hr/>
			16,195,300		15,118,701
CURRENT ASSETS					
Stock		5,784		4,611	
Debtors	13	117,626		87,478	
Cash at Bank and in Hand	14	1,474,998		785,373	
		<hr/>		<hr/>	
		1,598,408		877,462	
CREDITORS: amounts falling due within one year	15	381,040		290,187	
		<hr/>		<hr/>	
NET CURRENT ASSETS			1,217,368		587,275
			<hr/>		<hr/>
TOTAL ASSETS LESS CURRENT LIABILITIES			17,412,668		15,705,976
CREDITORS: amounts falling due after one year	16		744		-
			<hr/>		<hr/>
NET ASSETS			£17,411,924		£ 15,705,976
			<hr/> <hr/>		<hr/> <hr/>
REPRESENTED BY					
Unrestricted Funds					
Undesignated - General Fund			4,233,954		3,496,361
Designated	17		6,243,667		6,020,844
Restricted Funds	18		38,174		53,692
Endowed Funds	19				
Permanent endowment			6,376,321		6,002,937
Revaluation Reserve			519,808		132,142
			<hr/>		<hr/>
FUNDS			£17,411,924		£ 15,705,976
			<hr/> <hr/>		<hr/> <hr/>

Approved by the Board of Directors and Trustees on 11 November 2025 and signed on its behalf by:



C Aspinall
Director and Trustee



S Young
Director and Trustee

The notes on pages 43 to 56 form part of these financial statements.

**THE WILBERFORCE TRUST
STATEMENT OF CASHFLOWS
FOR THE YEAR ENDED 31 MARCH 2025**

	Note	2025 £	2024 £
Cash flows from operating activities:			
Net cash provided by operating activities	21	530,072	372,129
Cash flows from investing activities:			
Dividends, interest and rents from investments		171,393	186,194
Proceeds from the sale of property, plant and equipment		-	25,000
Purchase of property, plant and equipment		(39,867)	(260,770)
Proceeds from sales of investments		1,112,504	4,144,308
Purchase of investments		(1,084,477)	(1,594,987)
Net cash provided by investing activities		159,553	2,499,745
Cash flows from financing activities:			
Repayments of borrowing		-	(3,000,000)
Net cash used in financing activities		-	(3,000,000)
Change in cash and cash equivalents in the reporting period		689,625	(128,126)
Cash and cash equivalents at the beginning of the reporting period		785,373	913,499
Cash and cash equivalents at the end of the reporting period		1,474,998	785,373

Charity law requires separate administration of the cashflows of endowed and other restricted funds of the Charity. This constraint has not adversely affected cashflows as stated above.

The notes on pages 43 to 56 form part of these financial statements

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. ACCOUNTING POLICIES

Legal entity

The Wilberforce Trust is regulated by the Charity Commission (1087065), limited by guarantee and is registered in England and Wales. The address of the registered office and principal place of business is Wilberforce House, The Grove, York, YO24 1AN.

Basis of preparation

The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued in October 2019 and the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Companies Act 2006 and UK Generally Accepted Practice as it applies from 1 January 2019.

The Trust constitutes a public benefit entity as defined by FRS 102. The accounts are presented in UK Sterling pounds (£).

Going Concern

The Trustees have prepared financial projections, taking into consideration the current economic climate and its potential impact on the sources of income and planned expenditure. They have a reasonable expectation that adequate financial resources are available to enable the charity to continue in operational existence for the foreseeable future, and have adequate contingency plans in the event that income streams are reduced. Consequently the financial statements have been prepared on the basis that the charity is a going concern.

Income recognition

Income from service agreements is recognised when the Charitable Company has entitlement to the funds, any performance conditions attached to the items of income have been met, it is probable that the income will be received and the amount can be measured reliably. Voluntary income and donations including legacies are included in incoming resources when they are receivable, except when donors specify that they must be used in future accounting periods or donors conditions have not been fulfilled, then the income is deferred. The income from fundraising ventures is shown gross, with the associated costs included in fundraising costs. The value of services provided by volunteers is not incorporated into the accounts.

Grant income

Grant income is recognised when the conditions for receipt have been met and there is reasonable assurance that the grant will be received. It is then recognised in income on a systematic basis over the periods in which the entity recognises the related costs for which the grant is intended to compensate, except where the grant is compensation for expenses or losses already incurred or for the purpose of giving immediate financial support to the entity with no future related costs in which case it is recognised as income in the period in which it becomes receivable.

Expenditure and irrecoverable VAT

Resources expended are included in the Statement of Financial Activities on an accruals basis, inclusive of any VAT which cannot be recovered. All costs have been directly attributed to one of the functional categories of reserves expended in the Statement of Financial Activities.

Support costs are those incurred directly in support of the objects of the Charitable Company.

Governance costs are those associated with constitutional and statutory requirements.

Fundraising costs

Fundraising expenditure comprises costs incurred in inducing people and organisations to contribute financially to the Charitable Company's work. This includes the cost of advertising for donations and the staging of special fundraising events.

Operating leases

Rentals applicable to operating leases are charged to the Statement of Financial Activities over the period they are incurred.

Pension costs

The Charitable Company operates a defined contribution pension scheme and the charge in the accounts for pension costs represents the actual amount of contributions made by the employer to the pension scheme.

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. ACCOUNTING POLICIES (continued)

Fixed Assets

Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost/revaluation on a straight line basis over their expected useful economic lives as follows:

Freehold property	2% straight line basis
Fixtures and fittings	20% straight line basis
General equipment	20% straight line basis
Motor vehicles	20% straight line basis
IT equipment	25% straight line basis

All expenditure on all types of fixed assets of less than £2,500 is to be written off in year of purchase.

Investments and investment property

Investments and investment property are stated at market value at the balance sheet date. The Statement of Financial Activities includes the net gains and losses arising on revaluations and disposals throughout the year.

Fund accounting

Funds held by the Charitable Company are either:

- **Unrestricted general funds** - these are funds which can be used in accordance with the charitable objects at the discretion of the Directors/Trustees.
- **Unrestricted designated funds** - these are funds earmarked by the Directors/Trustees for particular purposes.
- **Restricted funds** - these are funds which can only be used for particular restricted purposes within the objects of the Charitable Company. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.
- **Permanent endowment funds** - these funds represent those assets which must be held permanently by The Wilberforce Home for the Blind charity.

Further explanation of the nature and purpose of each fund is included in the Notes to the Financial Statements.

Stock

Stock is stated at the lower of cost and net realisable value.

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.

Cash at bank and in hand

Cash at bank and cash 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 of similar account.

Creditors and provisions

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in a transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably.

Financial instruments

The Trust only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

2. DONATIONS AND LEGACIES

	2025 £	2024 £
Donations	9,013	11,034
Club Wilber	19,786	5,312
Legacies	-	45,863
	<u>£ 28,799</u>	<u>£ 62,209</u>



THE WILBERFORCE TRUST
NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

	2025	2024				
	£	£				
3. CHARITABLE ACTIVITIES						
Accommodation care & support services	£ 5,128,375	£ 4,696,316				
	2025	2024				
	£	£				
4. OTHER TRADING ACTIVITIES						
Grants & trusts income	17,224	53,639				
Other fundraising events	128	20				
Local giving income	1,330	1,764				
Café income	37,252	29,995				
	£ 55,934	£ 85,418				
	2025	2024				
	£	£				
5. INVESTMENTS						
Dividends investments listed on a recognised stock exchange	139,951	163,558				
Bank & other interest	18,412	12,417				
Rent received investment property	13,030	10,219				
	£ 171,393	£ 186,194				
	2025	2024				
	£	£				
6. OTHER INCOME						
Gain on disposal of fixed assets	£ -	£ 25,000				
7. ANALYSIS OF TOTAL EXPENDITURE						
	Staff costs	Premises costs	Depreciation	Other	2025	2024
	£	£	£	£	£	£
<u>Raising funds</u>						
Fundraising costs	-	-	-	56,365	56,365	25,917
Investment management costs	-	-	-	28,027	28,027	34,480
<u>Charitable activities</u>						
Accommodation, care & support services	3,138,519	367,037	200,644	1,144,564	4,850,764	4,566,391
Governance costs						
- auditor's remuneration	-	-	-	8,800	8,800	5,510
	£ 3,138,519	£ 367,037	£ 200,644	£ 1,237,756	£ 4,943,956	£ 4,632,298

Included in the amounts shown above are support costs totalling £775,569 (2024 £945,080) as shown in Note 8.

	2025	2024
	£	£
Included in other costs are:		
Agency costs	£ 398,395	£ 471,136
	<hr/>	<hr/>

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

8. SUPPORT COSTS

	Management £	Office costs £	Depreciation £	2025 £	2024 £
Accommodation, care & support services	£ 466,042	£ 275,842	£ 33,685	£ 775,569	£ 945,080

Support costs have been allocated to activity cost categories on a basis consistent with the use of resources.

9. STAFF COSTS

	2025 £	2024 £
Wages and salaries	2,773,493	2,417,961
Social security costs	270,666	242,384
Pension costs	94,360	95,306
	<u>£ 3,138,519</u>	<u>£ 2,755,651</u>

No remuneration has been paid to any Director/Trustee. Travelling expenses totalling £405 (2024 £nil) were reimbursed to 1 (2024 nil) Director/Trustee during the year.

The number of employees during the year, whose gross pay and benefits (excluding employer pension contributions and awards to inventors) fell within the following bands, was:

	2025 No.	2024 No.
£60,001 - £70,000	-	1
£70,001 - £80,001	1	-
£80,001 - £90,000	-	1

The key management personnel of the Trust, comprise the Trustees, the Chief Executive Officer and the Finance Director. The total employee benefits of the key management personnel of the Trust were £206,384 (2024 £199,168).

During the year the Charitable Company made termination payments totalling £47,333 (2024: £nil) in respect of one (2024: no) former employee.

The average monthly head count was 130 staff (2024 130).

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

10. TANGIBLE FIXED ASSETS

	Freehold property £	Fixtures and fittings £	General equipment £	Motor vehicles £	IT equipment £	Total £
<i>Cost or valuation</i>						
At 1 April 2024	9,914,025	-	-	-	64,339	9,978,364
Additions in year	-	17,643	14,640	7,584	-	39,867
Disposals in year	-	-	-	-	(41,120)	(41,120)
Revaluation	275,975	-	-	-	-	275,975
At 31 March 2025	10,190,000	17,643	14,640	7,584	23,219	10,253,086
<i>Depreciation</i>						
At 1 April 2024	318,983	-	-	-	64,339	383,322
Charge for year	200,644	-	-	-	-	200,644
Disposals in year	-	-	-	-	(41,120)	(41,120)
Revaluation	(519,627)	-	-	-	-	(519,627)
At 31 March 2025	-	-	-	-	23,219	23,219
<i>Net book value</i>						
At 31 March 2025	£ 10,190,000	£ 17,643	£ 14,640	£ 7,584	£ -	£ 10,229,867
At 31 March 2024	£ 9,595,042	£ -	£ -	£ -	£ -	£ 9,595,042

Unrestricted - designated
Endowed

2025 £	2024 £
6,233,867	5,966,044
3,996,000	3,628,998
£ 10,229,867	£ 9,595,042

The freehold property was revalued at 30 June 2022 by J L Burley of Briggs Burley Chartered Surveyors on the basis of open market value at £10,190,000.

If the freehold properties had not been included at valuation they would have been included under the historical cost convention as follows:

	2025 £	2024 £
Cost	10,002,098	10,002,098
Accumulated depreciation	(1,862,672)	(1,662,028)
Net book value	£ 8,139,426	£ 8,340,070

11. AUDITOR'S REMUNERATION

	2025 £	2024 £
Audit of the financial statements	4,000	4,000
Other fees to auditor		
All other non-audit services	2,930	2,930
	£ 6,930	£ 6,930

THE WILBERFORCE TRUST
NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

12. INVESTMENTS

	2025 £	2024 £
Market value at 1 April 2024	5,523,659	7,864,519
Additions	1,084,477	1,594,987
Disposals	(1,112,504)	(4,144,308)
Net gains	469,801	208,461
	<hr/> £ 5,965,433	<hr/> £ 5,523,659
	<hr/> 2025 £	<hr/> 2024 £
Unrestricted	3,065,304	3,017,578
Endowed	2,900,129	2,506,081
	<hr/> £ 5,965,433	<hr/> £ 5,523,659
	<hr/> 2025 £	<hr/> 2024 £
The historical cost of the above investments amounts to:	£ 5,113,678	£ 5,072,369
	<hr/>	<hr/>
Listed investments		
Within the UK	2,291,275	1,024,696
Outside the UK	3,319,158	4,498,963
Investment property - within the UK	355,000	-
	<hr/> £ 5,965,433	<hr/> £ 5,523,659
	<hr/>	<hr/>

All investments are held primarily to provide an investment return for the Charitable Company. The investment property is existing land and properties that were revalued during the year.

13. DEBTORS

	2025 £	2024 £
Trade debtors	18,198	18,614
Prepayments	27,280	9,619
Accrued income	72,148	59,245
	<hr/> £ 117,626	<hr/> £ 87,478
	<hr/> 2025 £	<hr/> 2024 £
Unrestricted	£ 117,626	£ 87,478
	<hr/>	<hr/>

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

14. CASH AND CASH EQUIVALENTS

	2025 £	2024 £
Cash in hand	1,617	821
Current account	5,000	5,000
Savings account	1,068,381	779,552
Short term deposits	400,000	-
	£ 1,474,998	£ 785,373
	2025 £	2024 £
Unrestricted	1,436,824	731,681
Restricted	38,174	53,692
Endowed	-	-
	£ 1,474,998	£ 785,373

15. CREDITORS: amounts falling due
within one year

	2025 £	2024 £
Trade creditors	28,864	79,715
Other creditors	23,311	2,712
Taxation and social security costs	54,571	59,640
Accruals and deferred income	273,881	147,615
Pension deficit funding agreement	413	505
	£ 381,040	£ 290,187
	2025 £	2024 £
Unrestricted	381,040	290,187
Unrestricted - designated	-	-
	£ 381,040	£ 290,187
	2025 £	2024 £
Deferred income		
Balance brought forward	91,377	98,882
Amount released in the year	(91,377)	(98,882)
Amount deferred in the year	112,885	91,377
	112,885	91,377

The Charitable Company was holding funds received in advance of the provision of contracted services, which will be fully released in the following financial year.

16. CREDITORS: amounts falling due
after one year

	2025 £	2024 £
Pension deficit funding agreement	744	-
	£ 744	£ -
	2025 £	2024 £
Unrestricted	744	-

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

17. DESIGNATED FUNDS

	Balance at 1 April 2024	Incoming resources	Resources expended	Gains on revaluation of fixed assets	Transfers	Balance at 31 March 2025
	£	£	£	£	£	£
Welfare Fund	9,800	-	-	-	-	9,800
Pension Reserve	20,000	-	-	-	(20,000)	-
Low Vision Service	25,000	-	-	-	(25,000)	-
Fixed Assets	5,966,044	-	(176,977)	404,933	39,867	6,233,867
	£ 6,020,844	£ -	(£ 176,977)	£ 404,933	(£ 5,133)	£ 6,243,667

	Balance at 1 April 2023	Incoming resources	Resources expended	Gains on revaluation of fixed assets	Transfers	Balance at 31 March 2024
	£	£	£	£	£	£
Welfare Fund	9,800	-	-	-	-	9,800
Pension Reserve	20,000	-	-	-	-	20,000
Low Vision Service	25,000	-	-	-	-	25,000
Fixed Assets	4,666,865	-	(176,983)	-	1,476,162	5,966,044
	£ 4,721,665	£ -	(£ 176,983)	£ -	£ 1,476,162	£ 6,020,844

Welfare Fund

To ensure that any hardship applications to continue to live in a tenanted house of The Wilberforce Trust can be funded where necessary to ensure that The Wilberforce clients can integrate in activities and live as independent lives as possible with equal opportunity.

Fixed Assets

Represents net book value of new building and other fixed assets and excludes property held as permanent endowment.

The transfer to the designated fixed assets fund relates to the purchase of fixed assets from unrestricted undesignated funds. The transfers from the designated Pension Reserve and Low Vision Service funds relates to designated funds no longer required.

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

18. RESTRICTED FUNDS

	Balance at 1 April 2024 £	Incoming resources £	Resources expended £	Transfers £	Balance at 31 March 2025 £
Club Wilber	36,692	29,329	(35,347)	-	30,674
Sensory garden and equipment	17,000	21,917	(38,917)	-	-
Befriending	-	7,500	-	-	7,500
	£ 53,692	£ 58,746	(£ 74,264)	£ -	£ 38,174

	Balance at 1 April 2023 £	Incoming resources £	Resources expended £	Transfers £	Balance at 31 March 2024 £
Club Wilber	9,651	36,889	(9,848)	-	36,692
Sensory garden and equipment	17,000	6,000	(6,000)	-	17,000
	£ 26,651	£ 42,889	(£ 15,848)	£ -	£ 53,692

Club Wilber

Funding for Club Wilber activities provided by Ed De Nunzio Charitable Trust, York Children's Trust, York Common Good Trust, Happy Days Children's Trust, NYCC Get Going, Blue Spark, Boshier-Hinton Foundation, Sylvia and Colin Shepherd CT and Yorkshire Building Society.

Sensory garden and equipment

New sensory equipment was purchased so that we can improve our offer to beneficiaries by enhancing and replacing our existing stock. Sensory stimulus can be really important for some of our beneficiaries, so as well as rolling out a programme for adults we are also supplementing baby sensory sessions and using the equipment for some Club Wilber activities too.

Our Sensory garden is designed to help visitors, staff and tenants benefit mentally from having a soothing and relaxing space, which appeals to all five senses and will connect them with nature. Tenants also have accessible raised beds in which they can sow and grow fruit and vegetables in order to encourage them to spend more time outdoors and get more exercise, which is beneficial both for physical and mental health, and also to 'eat healthy'.

Befriending

The Befriending Project is for people who are very elderly and have significant sight and/or hearing loss, if they are housebound and have no regular visitors. Volunteer befrienders will provide a lifeline for these beneficiaries through regular visits, to help them avoid social isolation and loneliness.

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

19. PERMANENT ENDOWMENT FUND

The Permanent Endowment Fund represents those assets which must be held permanently by the Charitable Company, principally property and investments. Income arising on the endowment fund can be used in accordance with the objects of the Charitable Company and are included as unrestricted income. Any capital gains or losses arising on the investments form part of the fund.

	Balance at 1 April 2024	Incoming resources	Resources expended	Investment gains	Gains on revaluation of fixed assets	Balance at 31 March 2025
	£	£	£	£	£	£
Wilberforce Home for the Blind	3,496,856	-	(20,664)	-	-	3,476,192
Investments	2,506,081	-	(12,612)	406,660	-	2,900,129
Revaluation reserve	132,142	-	(3,003)	-	390,669	519,808
	6,135,079	-	(36,279)	406,660	390,669	6,896,129

	Balance at 1 April 2023	Incoming resources	Resources expended	Investment losses	Transfers	Balance at 31 March 2024
	£	£	£	£	£	£
Wilberforce Home for the Blind	2,063,140	-	(20,664)	-	1,454,380	3,496,856
Investments	6,882,170	83,787	(15,516)	93,807	(4,538,167)	2,506,081
Revaluation reserve	135,145	-	(3,003)	-	-	132,142
	9,080,455	83,787	(39,183)	93,807	(3,083,787)	6,135,079

20. ANALYSIS OF NET ASSETS BETWEEN FUNDS

	Tangible Fixed Assets	Investments	Net Current Assets	Long term liabilities	2025
	£	£	£	£	£
Fund balances at 31 March 2025 are represented by:					
Unrestricted Funds	-	3,065,304	1,169,394	(744)	4,233,954
Designated Funds	6,233,867	-	9,800	-	6,243,667
Restricted Funds	-	-	38,174	-	38,174
Permanent Endowment Fund	3,996,000	2,900,129	-	-	6,896,129
	£ 10,229,867	£ 5,965,433	£ 1,217,368	£ (744)	£ 17,411,924



THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

20. ANALYSIS OF NET ASSETS BETWEEN FUNDS (continued)

	Tangible Fixed Assets £	Investments £	Net Current Assets £	Long term liabilities £	2024 £
Fund balances at 31 March 2024 are represented by:					
Unrestricted Funds	-	3,017,578	478,783	-	3,496,361
Designated Funds	5,966,044	-	54,800	-	6,020,844
Restricted Funds	-	-	53,692	-	53,692
Permanent Endowment Fund	3,628,998	2,506,081	-	-	6,135,079
	£ 9,595,042	£ 5,523,659	£ 587,275	£ -	£ 15,705,976

21. RECONCILIATION OF NET MOVEMENT IN FUNDS TO NET CASH FLOW FROM OPERATING ACTIVITIES

	2025 £	2024 £
Net income for the reporting period		
Adjustments for:	1,705,948	631,300
Depreciation charges	200,644	200,650
Gains on disposal of fixed assets	-	(25,000)
Gains on investments	(469,801)	(208,461)
Gains on revaluation of fixed assets for charity's own use	(795,602)	-
Dividends, interest and rents from investments	(171,393)	(186,194)
(Increase)/decrease in stock	(1,173)	2,137
Increase in debtors	(30,148)	(8,352)
Increase/(decrease) in creditors	91,597	(33,951)
Net cash provided by operating activities	£ 530,072	£ 372,129

ANALYSIS OF CASH AND CASH EQUIVALENTS

Cash at bank and in hand	1,474,998	785,373
Total cash and cash equivalents	£ 1,474,998	£ 785,373

ANALYSIS OF CHANGES IN NET DEBT

	At 01/04/2024 £	Cash-flows £	At 31/03/2025 £
Cash	785,373	689,625	1,474,998
	£ 785,373	£ 689,625	£ 1,474,998

22. OPERATING LEASE COMMITMENTS

	At 31 March 2025 £	At 31 March 2024 £
The total of future minimum lease payments is as follows:		
Operating leases which expire:		
Within one year	4,778	5,153
Within one to two years	4,464	4,496
Within two to five years	4,464	-
	£ 13,706	£ 9,649

The amount of non-cancellable operating lease payments recognised as an expense during the reporting period was £4,464 (2024 £5,153).

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

23. LEGAL STATUS

The Charity is a company limited by guarantee and has no share capital. The liability of each member in the event of winding up is limited to £10.

24. TAXATION

No corporation tax has been provided in the Charitable Company's accounts because the income of the entity, a registered charity, is within the exemption granted within Sections 466 to 493 of the Corporation Tax Act 2010.

25. PENSION SCHEME

The Pensions Trust Retirement Solutions - The Growth Plan

The Charitable Company participates in the scheme, a multi-employer scheme which provides benefits to some 638 non-associated participating employers. The scheme is a defined benefit scheme in the UK. It is not possible for the company to obtain sufficient information to enable it to account for the scheme as a defined benefit scheme. Therefore it accounts for the scheme as a defined contribution scheme.

The scheme is subject to the funding legislation outlined in the Pensions Act 2004 which came into force on 30 December 2005. This, together with documents issued by the Pensions Regulator and Technical Actuarial Standards issued by the Financial Reporting Council, set out the framework for funding defined benefit occupational pension schemes in the UK.

The scheme is classified as a 'last-man standing arrangement'. Therefore the Charitable Company is potentially liable for other participating employers' obligations if those employers are unable to meet their share of the scheme deficit following withdrawal from the scheme. Participating employers are legally required to meet their share of the scheme deficit on an annuity purchase basis on withdrawal from the scheme.

A full actuarial valuation for the scheme was carried out at 30 September 2023. This valuation showed assets of £514.9m, liabilities of £531.0m and a deficit of £16.1m. To eliminate this funding shortfall, the Trustee has asked the participating employers to pay additional contributions to the scheme as follows:

Deficit contributions

From 1 April 2025 to 31 March 2028: £2,100,000 per annum (payable monthly)

The recovery plan contributions are allocated to each participating employer in line with their estimated share of the Series 1 and Series 2 scheme liabilities.

Where the scheme is in deficit and where the Charitable Company has agreed to a deficit funding arrangement the Charitable Company recognises a liability for this obligation. The amount recognised is the net present value of the deficit reduction contributions payable under the agreement that relates to the deficit. The present value is calculated using the discount rate detailed in these disclosures. The unwinding of the discount rate is recognised as a finance cost.

Present values of provision

	2025	2024	2023
	£	£	£
Present value of provision	1,157	505	1,081
Reconciliation of opening and closing provisions	2025		2024
	£		£
Provision at start of period	505		1,081
Interest expense	13		42
Deficit contribution paid	(515)		(618)
Remeasurements – impact of any change in assumptions	7		-
Remeasurements – amendments to the contribution schedule	1,147		-
Provision at end of period	<u>1,157</u>		<u>505</u>

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

25. PENSION SCHEME (continued)

Income and expenditure impact	2025 £		2024 £
Interest expense	13		42
Remeasurements – impact of any change in assumptions	7		-
Remeasurements – amendments to the contribution schedule	1,147		-
Assumptions	2025	2024	2023
	% per		% per
	annum	% per annum	annum
Rate of discount	4.84	5.31	5.52

The discount rates shown above are the equivalent single discount rates which, when used to discount the future recovery plan contributions due, would give the same results as using a full AA corporate bond yield curve to discount the same recovery plan contributions.

The following schedule details the deficit contributions agreed between the Charitable Company and the scheme at each year end period:

Deficit contributions schedule

Year ending	2025 £	2024 £	2023 £
Year 1	413	515	618
Year 2	413	-	515
Year 3	413	-	-

The Charitable Company must recognise a liability measured as the present value of the contributions payable that arise from the deficit recovery agreement and the resulting expense in the income and expenditure account i.e. the unwinding of the discount rate as a finance cost in the period in which it arises.

It is these contributions that have been used to derive the Charitable Company's balance sheet liability.

26. CONTRACTS AND COMMITMENTS

Capital commitments at 31 March 2025 in relation to building works were £nil (2024: £nil).

27. VOLUNTEERS

Trust volunteers visit our tenants on a regular basis. Many of them have become befrienders and are making a real difference to the lives of the people they visit. Every volunteer is matched with a tenant carefully ensuring the same common interest from football to museum visits, from shopping for fun to reading carefully chosen books, from writing letters to going to the park together.

Our team of over 65 volunteers bring so much to The Wilberforce Trust. Skills, passion and energy that we are so grateful for. This year they befriended, crafted, baked, fund raised amazingly, giving so much of their time that was invaluable to the people whom we support and no report can be complete without placing on record our sincere thanks for their efforts.

28. RELATED PARTIES

There were no related party transactions during the reporting period.

THE WILBERFORCE TRUST

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

29. COMPARATIVE STATEMENT OF FINANCIAL ACTIVITIES AND INCOME AND EXPENDITURE ACCOUNT

	Unrestricted	Restricted	Permanent	Year ended
	General	Designated	Endowment	31 March
	Fund	Funds	Funds	2024
	£	£	£	£
Income and endowments from:				
Donations and legacies	19,320	-	-	62,209
Charitable activities	4,696,316	-	-	4,696,316
Other trading activities	85,418	-	-	85,418
Investments	102,407	-	83,787	186,194
Other income	25,000	-	-	25,000
Total	4,928,461	-	83,787	5,055,137
Expenditure on:				
Raising funds	44,881	-	15,516	60,397
Charitable activities	4,355,403	176,983	23,667	4,571,901
Total	4,400,284	176,983	39,183	4,632,298
Net income/(expenditure) and net movement in funds before gains on investments	528,177	(176,983)	44,604	422,839
Net gains on investments	114,654	-	93,807	208,461
Net income/(expenditure)	642,831	(176,983)	138,411	631,300
Transfers between funds	1,607,625	1,476,162	(3,083,787)	-
Net movement in funds	2,250,456	1,299,179	(2,945,376)	631,300
Reconciliation of funds:				
Total funds brought forward	1,245,905	4,721,665	9,080,455	15,074,676
Total funds carried forward	£ 3,496,361	£ 6,020,844	£ 6,135,079	£ 15,705,976

We're always looking to improve our accessibility.
If you find any problems or require this information
in a different language or format, such as
braille, audio or large print then please let us know.



 **TheWilberforceTrust**

 **@wilberforcetrust**

 **The Wilberforce Trust**