



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From

Period start date: 1st January 2023 Period end date: 31st December 2023

Charity name: THE HELEN FOUNDATION

Charity registration number: 1113860

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To encourage and support young people in Teignbridge, South Devon to experience hands-on high-quality quality arts workshops
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	1. Working closely with Daisi (Charity No.1071762), to provide experienced and qualified arts practitioners for school-based workshops, with the costs heavily subsidised by The Helen Foundation. 2. Make The Helen Foundation Arts Awards available to all schools in Teignbridge at no cost to themselves.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees have confirmed (May 2024) that they have regard to the Charity Commission guidance on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Grants (subsidies for arts workshops) are available each year to state-funded schools in Teignbridge.
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	All the activities of the charity are carried out by volunteers.

Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	1457 young people across 27 schools benefited from participating in the charity's arts workshops. 90%+ approval that <ul style="list-style-type: none"> a) they learned something new b) they enjoyed the experience

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As shown in the annual accounts, the charity shows a strong balance sheet.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Balance carried in the current accounts are sufficient to fund work for the year ahead. Any surplus is invested to produce a steady reliable income to the charity
Amount of reserves held	Para 1.22	£35,000 – reviewed annually
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Trustees keep the charity's future under constant review.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Collecting boxes Regular donations Charity auctions Legacies
Investment policy and objectives including any social investment policy adopted	Para 1.46	Charity investments are only invested in ethical and sustainable funds.
A description of the principal risks facing the charity	Para 1.46	Ageing trustees and key volunteers. Trustees conscious of need to keep the charity's sustainability under regular review.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Declaration of Trust dated 2006
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	Charitable status granted 2006 No. 1113860
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees collectively decide on size and skill-set of trustees, recruiting as needed.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	THEHELEN FOUNDATION
Other name the charity uses	THF
Registered charity number	1113860
Charity's principal address	3 BROADLANDS SHASLDON TQ14 0EH

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Anne Kirk			
2	Roger Kirk	Chair		
3	Alexander Kirk			
4	Thomas Kirk			
5	Ben Galloway			
6	Nicola Cruickshank			
7	Leon Winston			
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

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Full name(s)

Anne Dulce Kirk	Roger Malcolm Kirk
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Position (eg Secretary,
Chair, etc)

Trustee	Trustee and Chair
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Date

26 May 2024

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
Other monetary assets			
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

	Fund to which asset belongs	Cost (optional)	Current value (optional)
Investment assets			
Eden Tree	Managed Inc	80,000	76,373
Aviva Plattform	Baillie Gifford	10,000	13,224
Aviva Plattform	Rathbone	20,000	17,021
Aviva Plattform	Royal London	10,000	8,068
Aviva Plattform	Cash	-	4

	Fund to which asset belongs	Cost (optional)	Current value (optional)
Assets retained for the charity's own use			
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

	Fund to which liability relates	Amount due (optional)	When due (optional)
Liabilities			
		-	
		-	
		-	
		-	
		-	

med by one or two trustees on
half of all the trustees

Signature	Print Name	Date of approval
R M Kirk	ROGER KIRK	24/07/2024
Anne S. Kirk	ANNE KIRK	24/7/24



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees

Charity Name
THE HELEN FOUNDATION

On accounts for the year ended

31 DECEMBER 2023

Charity no
(if any)

1113860

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

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

Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

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

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

* Please delete the words in the brackets if they do not apply.

Signed:

Date:

19/07/2024

Name:

GRAHAM PERRY

Relevant professional
qualification(s) or body

FFA (INSTITUTE OF FINANCIAL ACCOUNTANTS)

(if any):

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Address:

	Teign Accountancy Services	
	1 Charter House	
	Dawlish Business Park	
	Dawlish, Devon EX7 0JH	

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

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