



# **Shy Lowen Horse and Pony Sanctuary**

## **Annual Report 2023**

# Reference and Administration Details

Charity name	<b>Shy Lowen Horse and Pony Sanctuary</b>
Registered Charity Number	<b>1122891</b>
Charity's principal address	<b>18 Back Lane</b>
	<b>Thornton</b>
	<b>Merseyside</b>
Postcode	<b>L29 7WD</b>

Trustee Name	Office (if any)	Dates acted (if not for whole year)
Bernadette Langfield	Chair	
Eric Langfield		
Michelle Irving		
Patricia Sheridan		
Kellie O'Shea		
Elouise Jones		
Nanette Cox		

# Structure, Governance and Management

## Description of the Charity's Trusts

*Type of governing document:* **Trust Deed**

*How the Charity is constituted:* **Trust**

*Trustee selection methods:* **Appointed by The Board of Trustees** the charity operates with a Child and Vulnerable Adults Protection Policy and Trustees, staff and adult volunteers are DBS (CRB) checked every three years.

The Charity works closely with Carla Lane's Animals In Need, military veteran charity Tom Harrison House and local education providers

The trustees recognize that public interest in the riding establishment activities are improving future economic sustainability. Continuation in the future sustainability will be dependant upon improvements to the infrastructure. The infrastructure improvements are proving to be impossible to achieve without securing a long lease (minimum 25 years) of the sanctuary site. Difficulty in negotiating a suitable lease with the land owner Sefton Council has been ongoing. As a result we engaged property specialist solicitor Stephen Breen in September 2022 following a second petition to seek a resolution with the land owner Sefton Council. This situation is ongoing.

## **Objectives and Activities**

FOR THE BENEFIT OF THE PUBLIC TO RELIEVE THE SUFFERING OF ANIMALS (IN PARTICULAR EQUINES) IN NEED OF CARE AND ATTENTION AND TO PROVIDE AND MAINTAIN RESCUE HOMES OR OTHER FACILITIES FOR THE RECEPTION, CARE AND TREATMENT OF SUCH ANIMALS.

TO PROMOTE HUMANE BEHAVIOUR TOWARDS ANIMALS BY PROVIDING APPROPRIATE CARE, PROTECTION, TREATMENT AND SECURITY FOR ANIMALS WHICH ARE IN NEED OF CARE AND ATTENTION BY REASON OF SICKNESS, MALTREATMENT, POOR CIRCUMSTANCES OR ILL USAGE.

TO EDUCATE THE PUBLIC IN MATTERS PERTAINING TO ANIMAL WELFARE IN GENERAL AND THE PREVENTION OF CRUELTY AND SUFFERING AMONG ANIMALS.

TO PROVIDE OPEN SPACE FOR PEOPLE OF ALL AGES AND ABILITIES TO ENJOY AND RESPECT NATURE AND WILDLIFE.

TO PROVIDE MENTAL HEALTH SUPPORT FOR PEOPLE WITH THE USE OF HOLISTIC THERAPIES.

TO PROVIDE INCLUSIVE AND AFFORDABLE ETHICAL EQUESTRIAN RECREATIONAL AND LEISURE PURSUITS FOR THE COMMUNITY.

***Whilst organising and arranging activities and events the trustees had regard for the guidance issued by the Charity Commission on Public Benefit.***

- © We were able to host eight of the open days in this financial year—there are 7 annually but this financial year had 2 Easter open days owing to Easter being late in 2022 and early in 2023. The open days were all very well attended even though the events in May and June were affected by unseasonal heavy rain and the dog show planned for the August event was postponed to September owing to excessive heat. The events were attended by a total in excess of 1400 people and raised over £10,000
- © During April as the post Covid 19 recovery gained momentum we began to recruit new volunteers and the young volunteer Care Committee meetings started again.
- © We are very grateful to all of the following people and organisations for their huge contribution in funding this charity throughout the pandemic crisis and the recovery through from 2020 to the present day. Without their help we would not survive.

Monty Roberts  
Kelly Marks  
Roger Lyon  
Mike Badger  
Joyce Lund Trust  
Jean Sainsbury Animal Welfare Trust  
Sefton MBC Discretionary  
LCR Cares  
Petplan Charitable Trust  
Royal Sun Alliance  
Ravensdale Trust  
Sylvia Waddilove Trust  
Marchig Animal Welfare Trust  
Marchig Foundation  
CAF Resilience Fund  
Hilda Holmes Charitable Trust  
Elise Pilkington Charitable Trust  
The Armed Forces Covenant Fund  
Sefton CVS  
Community Foundation for Merseyside  
Blue Sky Foundation  
Crosby Rotary Club  
Hemby Charitable Trust  
Liverpool One Foundation

## **Activities relating to aims and objectives**

Horses and ponies come to Shy Lowen for a number of reasons: owner's redundancy or other economic problems; illness of owners; animal behavioural problems or animal age or infirmity; abandoned animals etc with re-homed horses who are in new homes with permanent loan adoption contracts remaining the property of Shy Lowen as they have been guaranteed a home for life. New homes are inspected prior to placement and these are subject to contracts requiring specific care standards including agreement not to sell or pass the animal on to others.

Those who re-home an animal must donate a minimum of £10.00 a month as a Friend of Shy Lowen. Successful re-homing is due, in large part, to the work undertaken by volunteers.

Horses who are not rehomeable and those who are retained for working within the 'No Kicks, No Sticks' horse riding offering become permanent residents who be sponsored for as little as £10.00 a year and regular supporters come from far and wide to visit their adoptees.

Shy Lowen is sited on the edge of an urban area surrounded on three sides by social housing estates scoring highly for indices of deprivation. Volunteers come mainly from the local area and have few other opportunities to interact and care for horses and ponies. These people are able to enjoy open space, nature and be introduced to equestrianism.

Our volunteers range in age from 11 to over 80 years old. They are involved in all aspects of running the organisation from caring and training the resident animals, book-keeping, building and land management, fund-raising, machinery maintenance and any other ad hoc tasks.

We launched a second petition in an attempt to secure the holding of our HQ at Buckley Hill Lane

## **Social media**

Shy Lowen makes active use of social media through its webpage

<http://www.shylowen.com/>

Facebook

<https://www.facebook.com/pages/Shy-Lowen-Horse-Pony-Sanctuary/105853832819403>

And X (formerly known as Twitter)

<https://twitter.com/shylowen>

Social Media remains the most effective way to inform and educate the public about the Sanctuary and equine-related issues and advertise horses and ponies suitable for re-homing.

It is also the medium preferred by most young people and it is important to adapt to their communication style when working and educating young people.

The funding stream through Facebook has continued to be popular and is a great resource as it is completely free of charge both to hold as a platform and for donations.

We utilize these platforms to keep people up to date with the animals at Shy Lowen by showing regular videos and photographs of the activities and are exploring how we can make further use of them in the future

This leads to more donations being made as we are able to appeal for support.

The Shy Lowen Community were delighted to receive a visit on 23rd March from the Liverpool FC goalkeeper Adrian San Miguel with his family. Adrian very kindly gave over his social media page to Shy Lowen for several days to support our work.

# **Achievements and Performance**

We were honoured that our Chair Bernadette Langfield received one of the 490 Royal Voluntary Service Platinum Awards to commemorate the Platinum Jubilee of Queen Elizabeth II

Rehoming of horses and ponies has remained very slow this year as the effects of lockdown furlough bite people's finances.

Donations have remained steady .

We have continued to receive significant grant funding which has allowed the charity to survive.

# Financial Review

Our vulnerability owing to lack of reserve funding continues to cause serious issues. We are continually exploring means to improve this situation to ensure that the charity survives in the short term and thrives in the long term.

No funds are in deficit.

## Declaration

The Trustees declare that they have approved the Trustees Report above.

Signed on behalf of the charity's Trustees.

*Signature(s)*



*Full Name(s)* Bernadette Langfield

*Position* Trustee

*Date* 20/1/2024

**RECEIPTS AND PAYMENTS ACCOUNTS  
FOR THE YEAR ENDING 31 MARCH 2023**

	Total Funds	Total Funds
	2023	2022
<b>Receipts</b>		
loan horses	7581	4800
fundraising	14169	8126
sponsor horses	7680	6020
gift aid	7276	9664
friends of Shy Lowen	7884	1450
donations	77581	69524
grants	42865	42250
silent whispers	32060	22415
tack sales	1770	657
loanfrom clain	7000	
<b>Total Receipts</b>	<u>205866</u>	<u>164906</u>
<b>Payments</b>		
wages	89996	84686
capital equipment	9840	6950
hard feed	15559	12976
hay	30940	29120
bedding	4250	3900
farrier	5375	5380
rent	1395	1395
electric	353	0
manure	5200	4160
transport	340	120
tack	72	98
water	3726	3960
generator petrol	1820	2912
insurance	11838	8800
tools	1987	272
skip hire	1250	1250
cleaning	4183	2900
fundraising	2204	921
vet	9525	5320
repairs	7272	420
road tax	704	576
bank	660	0
stationery	193	165
website	65	65
reward and recognition	70	0
vehicle fuel	2269	3255
vehicle repairs and MOT	372	1340
ICO fee	35	0
Licensing	664	0
SAGE Payroll	202	0
passports	45	160
<b>Total Payments</b>	<u>212404</u>	<u>181101</u>

	<b>2023</b>		<b>2022</b>	
	<b>Unrestricted</b>	<b>Restricted</b>	<b>Unrestricted</b>	<b>Restricted</b>
<b>Net receipts (payments)</b>	-6538		-16165	
<b>Cash balances as at 1/4/22</b>	6963		23158	
<b>Cash balances as at 31/3/23</b>	425		6963	

## **Independent examiner's report to the trustees of Shy Lowen Horse and Pony Sanctuary – Charity number 1122891**

I report on the accounts of the Trust for the year ended 31 March 2023, which are set out on pages 01 to 02.

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

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

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

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

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

### **Independent examiner's statement**

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

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
  - to keep accounting records in accordance with section 41 of the 1993 Act; and
  - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act have not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



Signature

Name: Kari Hansen

Address: Newstead Farm

Quarry Street

Liverpool

L25 6DY

Date: 22/01/24