



Shy Lowen Horse and Pony Sanctuary

Annual Report 2024

Reference and Administration Details

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|-----------------------------|---|
| Charity name | Shy Lowen Horse and Pony Sanctuary |
| Registered Charity Number | 1122891 |
| Charity's principal address | Buckley Hill Lane Liverpool Merseyside |
| Postcode | L29 1YB |

| 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 and the plans for nature trails, wellbeing zones and easier access are key to improving the future sustainability of this charity to support the equine rescue work at its heart. The future sustainability will be dependant upon improvements to the infrastructure. As a result of us engaging property specialist solicitor Stephen Breen in September 2022 as outlined in our report for the financial year ending 31st March 2023 agreement with the land owner Sefton Council. The lease was completed on 28th March 2024. This provided the security required to complete the site upgrades we have long had in our plans. Deepest thanks to Stephen Breen and Ken Unsworth for all the work they did on our behalf

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 nine open days in this financial year—there are usually 7 annually but this financial year had an additional Halloween event over two evenings when we had the Four Horsemen of the Apocalypse and lantern lit skeleton horse rides utilising luminous paint to create illusion. All of open days were all well supported with the music festival event in July being most lucrative for fundraising
- © We are very grateful to all our dedicated staff and volunteers who ensure that the charity remains healthy and operates in accordance with the ethics and mission we strive to achieve. We also thank the following people and organisations for their contributions in supporting and funding this charity 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
Pets At Home Foundation
Merseyside Police Commissioner Youth Diversion Fund

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 3 years old 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.

The rehoming of equines remains slow as the economic crisis continues to bite. We have also seen a marked increase in the requests to take in horses from owners who are not able to support their animals any longer. This has led to us offering 'in home' support by providing basic care needs items such as food and bedding so horses can remain in their home.

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. This provides free of charge or low cost advertising which reaches the followers who are in excess of 12000 people.

It is also the medium preferred by most young people and we feel that with a major focus being on younger people through Care Committee 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 but has changed structure and so donations are routed through PayPal which incurs costs being taken from the donations before release to the charity.

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.

Some rehoming applications have failed because the applicant has not been truthful about their knowledge and experience. We introduced a requirement for video footage being provided showing the level of expertise the applicant has. This has reduced the number of 'time wasters' and failed appointments as we can assess in advance the suitability and match applicants to animals seeking homes accordingly.

Achievements and Performance

We were honoured Shy Lowen Horse & Pony Sanctuary was awarded the prestigious Charity Of The Year by the Equine Business Awards

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.

Security of tenure was achieved which has been a huge relief.

The site at Buckley Hill Lane has also been added to the register of community assets which affords further protection for the site.

Financial Review

We have had a goal for the past 3 years to achieve a minimum of 6 weeks and an ideal of 3 months of financial reserves and, pre covid, we were making inroads into doing this but the deficits and income challenges over those years meant that we used the funds we had managed to accumulate and we are currently operating very much on a 'hand to mouth' basis which is extremely challenging.

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 28/1/2025

RECEIPTS AND PAYMENTS ACCOUNTS
FOR THE YEAR ENDING 31 MARCH 2024

| | 2024 | | 2023 | |
|----------------------------------|---------------|-------------|---------------|------------|
| Receipts | unrestricted | restricted | unrestricted | restricted |
| loan horses | 8320 | | 7581 | |
| fundraising | 37711 | | 14169 | |
| sponsor horses | 9327 | | 7680 | |
| gift aid | 12918 | | 7276 | |
| friends of Shy Lowen | 6400 | | 7884 | |
| donations | 90426 | | 77581 | |
| grants | 40570 | 3600 | 42865 | |
| silent whispers training courses | 23600 | | 32060 | |
| tack sales | 1830 | | 1770 | |
| loanfrom clain | 0 | | 7000 | |
| legacy donation | 15000 | | | |
| Total Receipts | <u>246102</u> | <u>3600</u> | <u>205866</u> | |

Payments

| | | | |
|-------------------------|---------------|-------------|---------------|
| wages | 112412 | | 89996 |
| capital equipment | 8700 | 3600 | 9840 |
| hard feed | 15620 | | 15559 |
| hay | 32760 | | 30940 |
| bedding | 3900 | | 4250 |
| farrier | 6150 | | 5375 |
| rent | 1388 | | 1395 |
| electric | 789 | | 353 |
| manure | 4420 | | 5200 |
| transport | 0 | | 340 |
| tack | 853 | | 72 |
| water | 1609 | | 3726 |
| generator petrol | 60 | | 1820 |
| insurance | 6186 | | 11838 |
| tools | 2510 | | 1987 |
| skip hire | 1250 | | 1250 |
| cleaning | 5322 | | 4183 |
| fundraising | 2946 | | 2204 |
| vet | 13956 | | 9525 |
| repairs | 9628 | | 7272 |
| road tax | 709 | | 704 |
| bank | 974 | | 660 |
| stationery | 258 | | 193 |
| website | 135 | | 65 |
| reward and recognition | 95 | | 70 |
| vehicle fuel | 2080 | | 2269 |
| vehicle repairs and MOT | 975 | | 372 |
| ICO fee | 40 | | 35 |
| Licensing | 816 | | 664 |
| SAGE Payroll | 274 | | 202 |
| passports | 0 | | 45 |
| loan repayment CLAIN | 7000 | | |
| Total Payments | <u>243815</u> | <u>3600</u> | <u>212404</u> |

| | 2024 | | 2023 | |
|------------------------------------|--------------|------------|--------------|------------|
| | Unrestricted | Restricted | Unrestricted | Restricted |
| Net receipts (payments) | 2287 | 0 | -6538 | 0 |
| Cash balances as at 1/4/23 | 425 | 0 | 6963 | 0 |
| Cash balances as at 31/3/23 | 2712 | 0 | 425 | 0 |

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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 2024, 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: 28/01/25