

SOUTH BRENT & DISTRICT CARING

England & Wales · Charity number 1150875

Details

Status Registered

Legal form Trust

Registered 2013-02-18

Register [View on the Charity Commission register](#)

Contact

Address SOUTH BRENT & DISTRICT CARING
The Old School Centre
Totnes Road
South Brent
Devon
TQ10 9BP

Phone 01364700282

Email info@sbadc.org.uk

Website www.sbadc.org.uk

Activities

Objects: (1)THE RELIEF OF THOSE PERSONS IN NEED LIVING OR RESIDING IN THE PARISH OF SOUTH BRENT AND THE IMMEDIATE NEIGHBOURING PARISHES.(2) TO PROMOTE SOCIAL INCLUSION FOR THE PUBLIC BENEFIT AMONG PERSONS WHO ARE EXCLUDED FROM SOCIETY BECAUSE THEY ARE ELDERLY OR BY REASON OF POOR MENTAL HEALTH, LIMITED FINANCIAL MEANS, FAILING HEALTH, REDUCED MOBILITY, OR A FULL-TIME CARING COMMITMENT WHERE ONE IS NEEDED.

Activities: Provide help and support, promote social inclusion, independence and a better quality of home life to the elderly and those of poor mental health, limited finances, failing health or reduced mobility living in South Brent & district.Help is provided by carefully selected, trained & fully supported volunteers & includes: befriending, transport, carer support, gardening, shopping & signposting.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, The Advancement Of Health Or Saving Of Lives
- **Who:** Elderly/old People, People With Disabilities

Geography

- Devon

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£60,298	£106,345	-	-
2023-12-31	£49,919	£62,419	-	-
2022-12-31	£54,888	£41,293	-	-
2021-12-31	£30,469	£26,675	-	-
2020-12-31	£70,526	£38,554	-	-

Trustees

Name	Role	Appointed
Dr RALF-PETER SCHURA		2023-08-01
Graham Royle		2020-10-29
JENNIFER HAZELL		2018-03-29

SOUTH BRENT & DISTRICT CARING

England & Wales - Charity number 1150875

Accounts

South Brent and District Caring

Registered Charity no: 1150875

Principal address: South Brent Old School Community Centre,
Totnes Road, South Brent TQ10 9BP

Report of the Trustees for the Year Ended 31st December 2024

The Trustees have pleasure in presenting their report and the financial statements of the Charity for the period ended 31st December 2024.

Objects and public benefit

The Charitable Objects of South Brent and District Caring are set out in the Deed of Trust signed 11th February 2013 and are as follows:

- (1) The relief of those persons in need living or residing in the Parish of South Brent and the immediate neighbouring parishes.
- (2) To promote social inclusion for the public benefit among persons, who are excluded from society because they are elderly or by reason of poor mental health, limited financial means, failing health, reduced mobility, or a full-time caring commitment where one is needed.

The Trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit in reviewing the work undertaken during the year.

Conversion to a Charitable Incorporated Organisation

During 2024 the Trustees have merged this Charity South Brent & District Caring (Charity number: 1150875) into a new CIO of the same name (Charity number: 1204911). For the most part financial activity moved over to the new CIO 1st May 2024 and this financial report covers the financial year 1st January 2024 to 31st December 2024 for the old charity. The Trustees Annual Report covers the same period and is a consolidated view of all the Charity's work over that period.

How the activities have delivered the public benefit

The Charity takes client referrals from family, friends, health-care professionals as well as clients referring themselves. During the year we have seen a large 18% increase in client numbers, while volunteer numbers have remained steady.

People	End of year numbers
Clients	275
Volunteers	161
Friends of Caring	207
Age Range	24 - 101

Reported people numbers only include those that have been active during the year.

The table below refers to one-to-one services, Befriending has helped 18 clients, some of this is carer respite short term befriending. Transport has increased by 46% following a year on year trend; the service enables clients to attend medical appointments while transport to our regular (CM/LC/FDWD) social events has doubled from last year enabling more isolated people to attend these groups. This is a really beneficial service but logistically our most time consuming. This year we have had the support of an office volunteer to help run this service. This volunteer alone has given us 240 hours of support in 2024. We currently have around 21 transport volunteers with a core of 15 who are regular drivers.

Bespoke Personal Support is generally Operation Christmas and anything outside of our 'normal remit' it was delivered to 121 individuals.

Trips were three in number delivered to 37 unique clients again up on last year, and very popular with excellent feedback, included our beach trip and the local Christmas pantomime.

Services	2024 delivery numbers
Befriending	426
Transport	543
Signposting & informing	68
Transport to CM/LC/FDWD	98
Form Filling & Admin	30
Prescription Collection	28
Trips	3
Bespoke Personal Support	32

Regular social and well-being sessions have continued to run weekly and remained very popular. To sustain the quality and availability of these regular services even more volunteers have kindly stepped in through the year to help the groups and the office run smoothly and the Trustees wish to thank them for their time and dedication. Foot care sessions have increased from 16 to 23 through the year as this service becomes ever more popular. Overall the total number of group sessions was 244 an increase of 33 on last year. The attendance numbers for the year were as follows:

Group sessions	Number of sessions	Average attendance
Coffee morning	49 up	11
Walk & Talk	51 up	8
Lunch Club	47 up	26 up
Friendsday Wednesday	49 up	14 up
Compassionate café	25	5
Foot care	23 up	11
Trips	3	18 up

Evaluation

Expected beneficiary outcomes are associated with each service and accumulate through the year each time the service is delivered. The totals are:

Outcome	Incidences in 2024
Reduced Isolation	4,650 up 33%
Improved health and emotional well being	4,867 up 34%
Increased choice and control	2,298 up 72%
Improved quality of life	4,902 up 33%
Freedom from discrimination and harassment	3,780 up 20%
Maintaining personal dignity	4,300 up 25%
Making a positive contribution	2,135 up 14%
Economic well being	2,827 up 26%

Office Enquiry Statistics

The figures below are for the period January¹ to December 2024. Office footfall is significantly increased if compared to the previous years total of 2445 contacts, a 27.5% increase.

	No	Total by different type of contact
Source of contact		
Phone	1092	3116
Visit	1902	
Home visit & other	122	
Of these...		Total Contacts
New Faces	328	3116
Repeat	1713	
Volunteer	765	
Professional	213	
Trustees	97	

Warm Space/The Hub Jan 24 -Dec 24

Total days recorded	Total users (visits)	Total volunteer sessions	Average daily users	Average volunteer per day
252 up	2716 up	521 down	10	2 down

The Hub is open from 9:30 –12:30 weekdays and hosts a number of activities and also functions as an open space for connection and a cuppa. The above includes Walk and Talk, Coffee Morning and Compassionate Café as groups using The Hub, they are counted in earlier figures. To see the other Hub users outside of those groups, the stripped back figure of total user visits are 1756, which is still a significant number of visits. This year saw a shift from

¹ Statistics had been collated to meet trustee meeting reporting periods, and so for 2024 an average figure has been taken for the period from 1st Jan until the first trustee meeting (23rd Feb) as the original reporting period stretched back to November 2023.

volunteers assisting all week as a warm space/hub to mostly for organised sessions. Taking off the Compassionate Café, Coffee Morning and Walk and Talk volunteer sessions leaves 57 volunteer sessions that are purely supporting The Hub.

Governance

The Care Services Co-ordinator reports six times a year to the Management Committee and four times a year to the Trustee board. Two Trustees sit on the Management Committee, one of which is the Chairman of the committee.

Susanne Archard as Care Services Coordinator and Lucy Jonas as Operations Manager have remained in their roles throughout the year.

During the financial period and subsequently to date the following Trustees held office:

- Jennie Hazell
- Carolyn Hedges (Resigned 21st November 2024)
- James Hill
- Elaine Musgrave (Elected 21st November 2024)
- John Rawlinson
- Graham Royle (Acting Chairman)
- David Schura
- Lindsey Stewart

No Trustee expenses were claimed during the year.

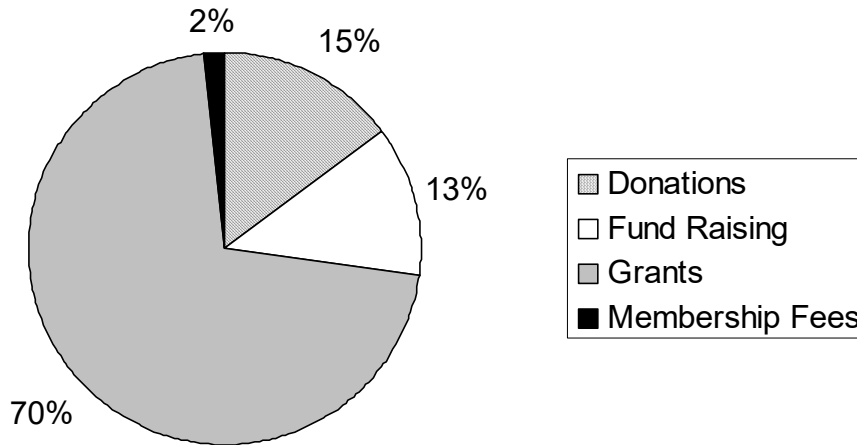
The Charity has become noticeably busier and new volunteers have risen to the challenge, the Trustees have also agreed to increase paid support workers hours. In 2023 contracted hours amounted to 1.33 equivalent full time (EFT) workers in 2024 this rose to 1.46 EFT and in 2025 it is expected to rise to 1.65 EFT.

Principal Funding Sources

During the financial period grant funding has been gratefully received from

Studd Charitable Trust, The Freemasons: Dartmoor Lodge, South Brent Feoffees (specifically for the residents of South Brent Parish), South Brent Parish Council, Devon Community Car Forum, Sustainable South Brent, Livewell Foundation, Garfield Weston Foundation, Soundart Radio and National Lottery Awards for All England. The Trustees wish to express their sincere gratitude for this funding and the support and recognition given to the work the Charity undertakes.

The chart on the next page shows the four main sources of revenue.



The Trustees acknowledge and thank the many private individuals who donate so generously through regular giving. Not only is this an enormous help to the sustainability of the Charity but a tangible appreciation of the benefit South Brent & District Caring delivers to the local community.

Reserves policy

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a minimum level of four months and a maximum of twelve months of unrestricted expenditure. At the end of the financial period the Trustees estimate the Charity holds 10 months operating costs in unrestricted reserves.

Risk review

The Trustees continue to review risk scoring and mapping the Charity’s exposure based on the following risk appetite profile:

- Operational Risk - Minimal
- Conduct Risk - Cautious
- Regulatory Risk - Minimal
- Solvency Risk - Minimal

The Trustees continue to manage risk and review exposure to changes in the operating environment.

Responsibilities of the Trustees

All new Trustees are vetted and receive the latest version of “The Essential Trustee” CC3, the Deed of Trust and an outline of their responsibilities.

Signed on behalf of the Board



 Graham Royle (Acting Chairman)

Dated..... 5/7/2025

Independent Examiner's Report to the Trustees of South Brent & District Caring

I report on the accounts of the Charity for the year ended 31st December 2024 set out on pages 8 to 9.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

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 next statement.

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 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 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.

Name: Mrs Felicity M Ferry

Signed:



Date:

8 August 2025

Relevant professional qualification or body: ACA

Address: Oakmeade
Exeter Road
South Brent
TQ10 9JP



CHARITY COMMISSION
FOR ENGLAND AND WALES

South Brent & District Caring 1150875

Receipts and payments accounts

CC16a

For the period from 01 Jan 2024 To 31 Dec 2024

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Incoming resources from generated funds	-	-	-	-	-
Voluntary income	36,069	-	-	36,069	35,020
Activities for generating funds	6,905	-	-	6,905	4,808
Investment income	1,649	-	-	1,649	473
Incoming resources from charitable activities	-	-	-	-	-
Transport	5,339	-	-	5,339	3,353
Client activities & services	10,337	-	-	10,337	6,262
Miscellaneous	1	-	-	1	3
Sub total (Gross income for AR)	60,298	-	-	60,298	49,919
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	60,298	-	-	60,298	49,919
A3 Payments					
Costs of Generating Funds					
Fundraising costs	542	-	-	542	1,540
Charitable activities					
Client activities & service expenses	6,479	-	-	6,479	10,848
Transport	3,377	-	-	3,377	2,346
Care coordination & admin services	15,076	-	-	15,076	40,172
Office	2,017	-	-	2,017	5,378
Volunteer support	941	-	-	941	914
Other resources expended					
Office equipment	134	-	-	134	785
Miscellaneous	16	-	-	16	436
Sub total	28,582	-	-	28,582	62,419
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
Merger asset transfer	77,763	-	-	77,763	-
Sub total	77,763	-	-	77,763	-
Total payments	106,345	-	-	106,345	62,419
Net of receipts/(payments)	- 46,047	-	-	- 46,047	- 12,500
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	55,970	-	-	55,970	68,470
Cash funds this year end	9,923	-	-	9,923	55,970

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Savings account	-	-	-
	Current Account	9,596	-	-
	Petty Cash	327	-	-
	Total cash funds	9,923	-	-

(agree balances with receipts and payments account(s))

OK OK OK

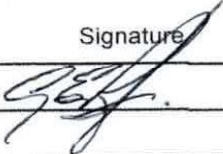
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature 	Print Name G.E. ROYLE	Date of approval 5/7/25
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SOUTH BRENT & DISTRICT CARING

England & Wales - Charity number 1150875

Accounts

South Brent and District Caring

Registered Charity no: 1150875

Principal address: South Brent Old School Community Centre,
Totnes Road, South Brent TQ10 9BP

Report of the Trustees for the Year Ended 31st December 2023

The Trustees have pleasure in presenting their report and the financial statements of the Charity for the period ended 31st December 2023.

Objects and public benefit

The Charitable Objects of South Brent and District Caring are set out in the Deed of Trust signed 11th February 2013 and are as follows:-

- (1) The relief of those persons in need living or residing in the Parish of South Brent and the immediate neighbouring parishes.
- (2) To promote social inclusion for the public benefit among persons, who are excluded from society because they are elderly or by reason of poor mental health, limited financial means, failing health, reduced mobility, or a full-time caring commitment where one is needed.

The Trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit in reviewing the work undertaken during the year.

The Warm Room established in October 2022 continued to function throughout 2023 acting as a community hub and drop in centre; this has been a joint initiative with Sustainable South Brent. The Hub has facilitated networking and community engagement and as a result the Charity has been able to reach deeper into the community and connect with the more isolated introducing them to a range of client services and regular social events. Attendance to these events has increased and the number of events has also increased to meet demand. The Charity has become noticeably busier and new volunteers have risen to the challenge, the Trustees have also agreed to increase paid support workers hours. In 2022 the three contracted workers provided 0.99 equivalent full time (EFT) hours in 2023 this rose to 1.33 EFT and in 2024 it is expected to rise to 1.46 EFT.

How the activities have delivered the public benefit

The Charity takes client referrals from family, friends, health-care professionals as well as clients referring themselves. We have changed the way we report people numbers to only include those that have been active during the year, this has led to a reduction in clients and Friends compared with the report for last year but the figures are more relevant to current activity.

People	End of year numbers
Clients	233
Volunteers	165
Friends of Caring	203
Age Range	24 - 101

In terms of the one-to-one services, Befriending is still high on delivery due to the number of sessions but reducing year on year with 15 beneficiaries receiving this service. Transport is very notably up over 100 journeys to 372, with a related increase in transports to our groups that is enabling more isolated people to attend. During the year we have collected the following figures:

Services	2023 delivery numbers
Befriending	484
Transport	372
Signposting & informing	40
Transport to CM/LC/FDWD	50
Form Filling & Admin	40
Prescription Collection	29

Christmas outreach is included as 3 sessions this equates to 3 days over which 98 otherwise isolated local people received a visit and a homemade Christmas cake along with other gifts. Last financial year 61 people received this service. Numbers were bolstered by health professional referrals. Trips were three in number delivered to 29 unique clients, and very popular with excellent feedback.

The attendance numbers for the year were as follows:

Group sessions	Number of sessions	Average attendance
Coffee morning	48	11
Walk & Talk (new)	48	5
Lunch Club	44	25
Friendsday Wednesday	46	10
Compassionate café	25	5
Foot care	16	11
Christmas outreach	3	98
Trips	3	12

We welcomed Walk & Talk this year as a new service and offered a walk nearly every week of the year. Compassionate café had its first full year and increased the number of sessions offering 25 weekend cafes for people who have experienced bereavement. Overall the total number of groups run was 211.

Foot care has run a similar number of sessions however beneficiaries of this now increasingly busy service have increased from 29 in 2022 to 42 in 2023. It runs with a waiting list.

Evaluation

Expected client outcomes are associated with each service and accumulate through the year, these provide an indication of how the Charity is making a difference to people's lives. The totals and direction of travel are:

Outcome	Incidences in 2023
Reduced Isolation	3494 ↑
Improved health and emotional well being	3634 ↑
Increased choice and control	1335 ↑
Improved quality of life	3696 ↑
Freedom from discrimination and harassment	3151 ↑
Maintaining personal dignity	3440 ↑
Making a positive contribution	1881 ↑
Economic well being	2244 ↑

Office Enquiry Statistics

Collection of these started in the last financial year for 7 months with an overall total of 521 contacts for that period. The period below runs from December 1st 2022 until 17th November 2023, the period being due to how the stats are produced for trustee meetings. Office footfall very significantly increased during this period.

	No	Total by different type of contact
Source of contact		
Phone	736	2445
Visit	1576	
Home visit & other	133	
Of these...		Total Contacts
New Faces	343	2445
Repeat	1218	
Volunteer	633	
Professional	138	
Trustees	113	

Warm Space/The Hub Jan 23 -Dec 23

Total days recorded	Total users (visits)	Total volunteer sessions	Average daily users	Average volunteer per day
243	2313	692	9.5	3

The above includes Walk and Talk, Coffee morning and Compassionate Café as groups using The Hub, they are counted in earlier figures. To see the other Hub users outside of those groups, the stripped back figure of total user visits are 1432, which is still a significant number of visits. Taking off Compassionate Café & Coffee Morning volunteer sessions leaves 411 volunteer sessions.

Combining the groups, services, office enquiry/drop-in and The Hub paints a picture of how busy South Brent & District Caring has become throughout 2023.

Governance

The Care Services Co-ordinator reports six times a year to the Management Committee and four times a year to the Trustee board along with the Chairman of the Management Committee.

Susanne Archard as Care Services Coordinator and Lucy Jonas as Operations Manager have remained in their roles throughout the year.

During the financial period and subsequently to date the following Trustees held office:

- Jennie Hazell
- Carolyn Hedges (Elected 2nd May 2023)
- James Hill (Chairman)
- John Rawlinson
- Graham Royle
- David Schura (Elected 1st August 2023)
- Lindsey Stewart

No Trustee expenses were claimed during the year.

The Trustees want to recognise the enormous contribution the late John Gower gave to the Charity at many levels within the organisation; John retired as a Trustee 25th January 2023 and died 12th February 2024.

Conversion to a Charitable Incorporated Organisation

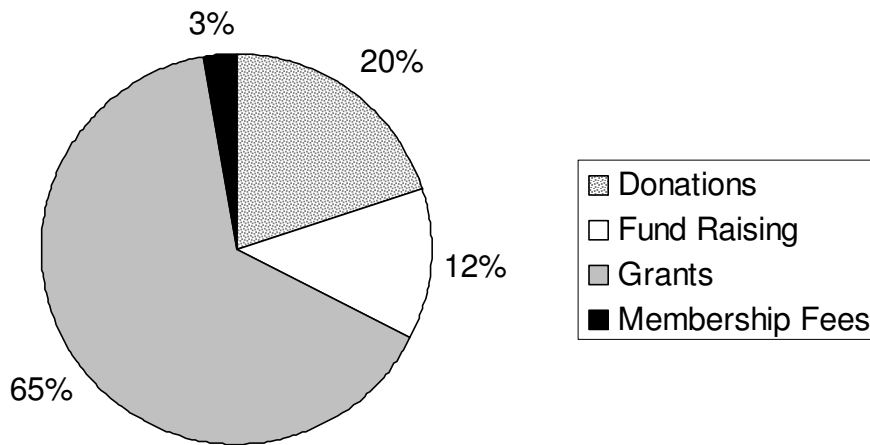
At their meeting on 1st August 2023 the Trustees agreed to incorporate the Charity by conversion to a CIO. A constitution was drafted and signed 30th August 2023 the new CIO was registered with the Charity Commission 25th September 2023 (Charity number: 1204911). The plan is to merge (convert) the Charity during 2024.

Principal Funding Sources

During the financial period grant funding has been gratefully received from

St Petroc's Church, Studd Charitable Trust, The Freemasons: Dartmoor Lodge and Trinity Chapter, South Brent Feoffees (specifically for the residents of South Brent Parish), South Brent Community Energy Society, North Huish Feoffees, South Brent Parish Council, Devon Community Car Forum and The Cooperative Community Fund. The Trustees wish to express their sincere gratitude for this funding and the support and recognition given to the work the Charity undertakes.

The chart below shows the four main sources of revenue. The balance between revenue streams is beginning to look similar to pre-pandemic.



The Trustees acknowledge and thank the many private individuals who donate so generously through regular giving. Not only is this an enormous help to the sustainability of the Charity but a tangible appreciation of the benefit South Brent & District Caring delivers to the community.

Reserves policy

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a minimum level of four months and a maximum of twelve months of unrestricted expenditure. At the end of the financial period the Trustees estimate the Charity holds 9 months operating costs in unrestricted reserves.

Risk review

The Trustees continue to review risk scoring and mapping the Charity's exposure based on the following risk appetite profile:

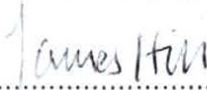
- Operational Risk - Minimal
- Conduct Risk - Cautious
- Regulatory Risk - Minimal
- Solvency Risk - Minimal

The Trustees continue to manage risk and review exposure to changes in the operating environment.

Responsibilities of the Trustees

All new Trustees are vetted and receive the latest version of "The Essential Trustee" CC3, the Deed of Trust and an outline of their responsibilities.

Signed on behalf of the Board



 James Hill
 Chairman of the Board of Trustees

Dated... 30.11.2024

Independent Examiner's Report to the Trustees of South Brent & District Caring

I report on the accounts of the Charity for the year ended 31st December 2023 set out on pages 8 to 9.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

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 next statement.

Independent examiner's statement

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

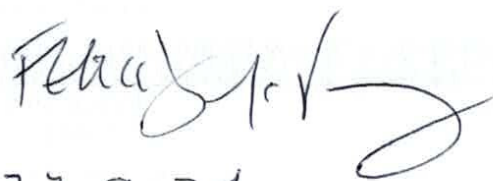
- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

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.

Name: Mrs Felicity M Ferry

Signed:



Date:

27-9-24

Relevant professional qualification or body: ACA

Address: Oakmeade
Exeter Road
South Brent
TQ10 9JP



South Brent & District Caring		1150875	
Receipts and payments accounts			
For the period from	01 Jan 2023	To	31 Dec 2023

CC16a

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Incoming resources from generated funds	-	-	-	-	-
Voluntary income	35,020	-	-	35,020	47,254
Activities for generating funds	4,808	-	-	4,808	3,426
Investment income	473	-	-	473	51
Incoming resources from charitable activities	-	-	-	-	-
Transport	3,353	-	-	3,353	3,117
Client activities & services	6,262	-	-	6,262	1,065
Miscellaneous	3	-	-	3	25
Sub total (Gross income for AR)	49,919	-	-	49,919	54,888
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	49,919	-	-	49,919	54,888
A3 Payments					
Costs of Generating Funds					
Fundraising costs	1,540	-	-	1,540	414
Charitable activities					
Client activities & service expenses	10,848	-	-	10,848	5,219
Transport	2,346	-	-	2,346	-
Care coordination & admin services	40,172	-	-	40,172	27,496
Office	5,378	-	-	5,378	4,765
Volunteer support	914	-	-	914	856
Other resources expended					
Office equipment	785	-	-	785	1,407
Miscellaneous	436	-	-	436	1,136
Sub total	62,419	-	-	62,419	41,293
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	62,419	-	-	62,419	41,293
Net of receipts/(payments)	- 12,500	-	-	- 12,500	13,595
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	68,470	-	-	68,470	54,875
Cash funds this year end	55,970	-	-	55,970	68,470

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Savings account	53,024	-	-
	Current Account	2,684	-	-
	Petty Cash	262	-	-
	Total cash funds	55,970	-	-

(agree balances with receipts and payments account(s))

OK OK OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
James Hill	DR JAMES HILL	30/5/24

SOUTH BRENT & DISTRICT CARING

England & Wales - Charity number 1150875

Accounts

South Brent and District Caring

Registered Charity no: 1150875

Principal address: South Brent Old School Community Centre,
Totnes Road, South Brent TQ10 9BP

Report of the Trustees for the Year Ended 31st December 2022

The Trustees have pleasure in presenting their report and the financial statements of the Charity for the period ended 31st December 2022.

Objects and public benefit

The Charitable Objects of South Brent and District Caring are set out in the Deed of Trust signed 11th February 2013 and are as follows:-

- (1) The relief of those persons in need living or residing in the Parish of South Brent and the immediate neighbouring parishes.
- (2) To promote social inclusion for the public benefit among persons, who are excluded from society because they are elderly or by reason of poor mental health, limited financial means, failing health, reduced mobility, or a full-time caring commitment where one is needed.

The Trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit in reviewing the work undertaken during the year. In 2022 the Charity has worked hard to safely return clients to regular social activities after the isolation during the Covid-19 lockdowns. Many clients had got out of the habit of getting out the house and were in danger of suffering increased loneliness and a loss of social confidence as a knock on effect of the pandemic. Clients have responded well to the encouragement and attendance numbers at the regular activities have built steadily through the year.

In September the Charity saw increasing demand driven by the cost of living crisis and in October with the help of South Brent Community Energy Society we were able to open a warm room at the Old School Community Centre. This has allowed us to reach new clients, address isolation as well as the cost of living and develop social cohesion.

In June the Charity was honoured to receive the Queens Award for Voluntary Service. While the award is given to everyone who volunteers for the Charity the Trustees want to add their thanks and appreciation to all those who volunteer tirelessly for South Brent & District Caring, it is only through their commitment that the whole thing works.



**The Queen's Award
for Voluntary Service**

The MBE for volunteer groups

How the activities have delivered the public benefit

The Charity takes client referrals from family, friends, health-care professionals as well as clients referring themselves. As part of the post pandemic recovery we have promoted the services offered to the local community and this has resulted in a 20% increase in client numbers, as well as more volunteers and Friends.

People	End of year numbers
Clients	262
Volunteers	156
Friends of Caring	259
Age Range	18 - 101

In terms of the one-to-one services, Transport, typically to health appointments has seen a big increase of 41% over last year as the NHS tackles the post pandemic backlog. We have also formalised the transport to the regular events as this enables inclusivity and improves attendance. We have introduced a Special Support category covering flexible support where a service has been driven by the client's specific need. During the year we have collected the following figures:

Services	2022 delivery numbers
Befriending	514
Transport	247
Gardening	55
Shopping	49
Transport to CM/LC/FDWD (new)	20
Form Filling & Admin	18
Special Support (new)	17

Numbers of regular group sessions are up overall for the year post pandemic. Coffee morning moved into the Warm Space in November 2022 to increase activity and conviviality in that space. Foot care was impacted by Covid-19 for longer in 2022 than other services. Overall a positive move for most groups sessions starting to recover numbers, and a new group starting in The Compassionate Café & trips. The attendance numbers for the year were as follows:

Group sessions	Number of sessions	Average attendance
Coffee morning	22	9
Lunch Club	22	19
Friendsday Wednesday	45	11
Foot care	14	10
Compassionate café (new Sept 2022)	4	7
Day trips (new Sept 2022)	1	12

Evaluation

Expected client outcomes are associated with each service and accumulate through the year, these provide an indication of how the Charity is making a difference to people's lives. The totals and direction of travel are:

Outcome	Incidences in 2022
Reduced Isolation	2102 ↑
Improved health and emotional well being	2165 ↑
Increased choice and control	932 ↑
Improved quality of life	2296 ↑
Freedom from discrimination and harassment	2017 ↑
Maintaining personal dignity	2088 ↑
Making a positive contribution	712 ↓
Economic well being	1423 ↑

The fall in 'making a positive contribution' is due to database cleaning.

Office Enquiry Statistics – new in 2022

Collection of these started on 1st June 2022 to track office contacts. The office footfall increased during the year as people, volunteers and professional contacted or dropped in for support, to request services and to speak with the co-ordinators.

	Number by different type of contact	Total Contacts
Source of contact		
Phone	190	521
Visit	321	
Home visit	12	
Of these...		
New enquiry/client	142	521
Repeat	237	
Volunteer	123	
Professional	19	

The Warm Room is undergoing separate evaluation to be published later in 2023

Governance

The Care Services Co-ordinator reports six times a year to the Management Committee and four times a year to the Trustee board along with the Chairman of the Management Committee.

In June 2022 Jane Sullivan stepped down as Care Services Coordinator and Susanne Archard took on the role. Lucy Jonas was also contracted the same month to take over from Susanne as Office Manager. The Trustees thank Jane for her service to the Charity always calmly resolving problems for the better since she joined in November 2016 - most notably over the last two years.

During the financial period and subsequently to date the following Trustees held office:

- John Gower (Retired 25th January 2023)
- Jennie Hazell
- Carolyn Hedges (Elected 2nd May 2023)
- James Hill (Chairman)
- John Rawlinson
- Graham Royle
- Lindsey Stewart

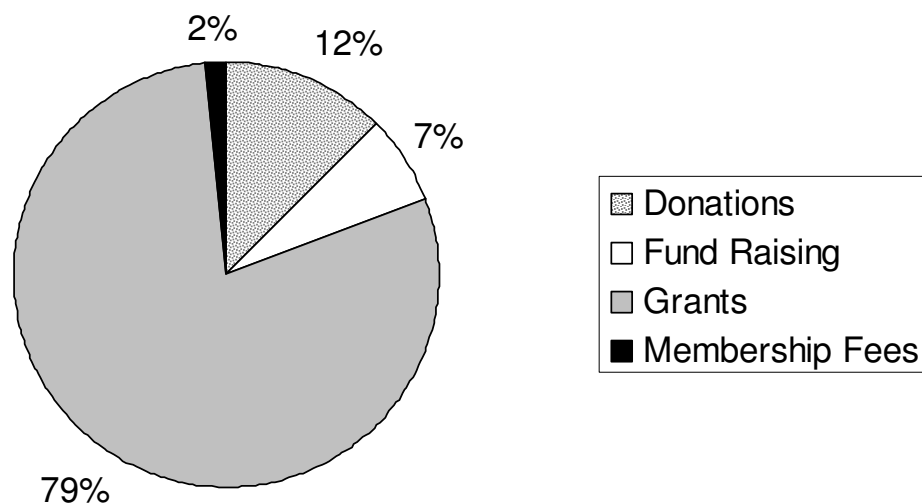
No Trustee expenses were claimed during the year.

Principal Funding Sources

During the financial period grant funding has been gratefully received from The Cooperative Community Fund, South Brent Feoffees (specifically for the residents of South Brent Parish), West Devon Community Transport Scheme, South Brent Community Energy Society (To enable the Warm Room), South Brent Parish Council, Dartmoor Freemasons Lodge, South Brent Parish Church, The Provincial Grand Chapter of Devonshire Freemasons (specifically for day trips), Awards for All and South Hams District Council, a Central Government grant for restarting services after Covid-19 lockdown . The Trustees wish to express their sincere gratitude for this funding and the support and recognition given to the work the Charity undertakes.

The chart below shows the four main sources of revenue. The revenue from fund raising events was once again constrained by Covid-19 restrictions because even though there were periods through the year when it was possible to hold events the main focus of the Charity was to rebuild service delivery.

The Trustees acknowledge and thank the many private individuals who donate so generously through regular giving. Not only is this an enormous help to the sustainability of the Charity but a tangible appreciation of the benefit South Brent & District Caring delivers to the community.



Reserves policy

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a minimum level of four months and a maximum of twelve months of unrestricted expenditure. At the end of the financial period the Trustees estimate the Charity holds 22 months operating costs in unrestricted reserves. This is higher than the maximum set by the policy and the Trustees have made careful decisions to increase the services provided in response to the cost of living crisis and to rebuild societal resilience and vitality in areas affected by the pandemic. In doing so the affect on the budget for 2023 has been to bring reserves down to 13 months of operating costs.

Risk review

The Trustees continue to review risk scoring and mapping the Charity's exposure based on the following risk appetite profile:

- Operational Risk - Minimal
- Conduct Risk - Cautious
- Regulatory Risk - Minimal
- Solvency Risk - Minimal

The Trustees continue to manage risk and review exposure to changes in the operating environment.

Responsibilities of the Trustees

All new Trustees are vetted and receive the latest version of "The Essential Trustee" CC3, the Deed of Trust and an outline of their responsibilities.

Signed on behalf of the Board


.....
James Hill
Chairman of the Board of Trustees

Dated *1st Aug 2023*
.....

Independent Examiner's Report to the Trustees of South Brent & District Caring

I report on the accounts of the Charity for the year ended 31st December 2022 set out on pages 8 to 9.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

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 next statement.

Independent examiner's statement

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

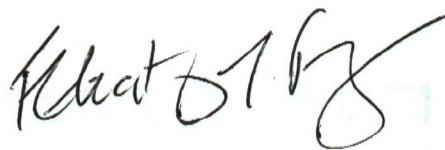
- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

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.

Name: Mrs Felicity M Ferry

Signed:



Date:

20-10-23

Relevant professional qualification or body: ACA

Address: Oakmeade
Exeter Road
South Brent
TQ10 9JP



CHARITY COMMISSION
FOR ENGLAND AND WALES

South Brent & District Caring		1150875		CC16a
Receipts and payments accounts				
For the period from	01 Jan 2022	To	31 Dec 2022	

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Incoming resources from generated funds	-	-	-	-	-
Voluntary income	47,254	-	-	47,254	27,141
Activities for generating funds	3,426	-	-	3,426	775
Investment income	51	-	-	51	57
Incoming resources from charitable activities	-	-	-	-	-
Transport	3,117	-	-	3,117	1,710
Foot care	1,065	-	-	1,065	785
Miscellaneous	25	-	-	25	1
Sub total (Gross income for AR)	54,888	-	-	54,888	30,469
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	54,888	-	-	54,888	30,469
A3 Payments					
Costs of Generating Funds					
Fundraising costs	414	-	-	414	258
Charitable activities					
Care service expenses	5,219	-	-	5,219	2,851
Covid-19 response	-	-	-	-	5,540
Care coordination & admin services	27,496	-	-	27,496	17,243
Office	4,765	-	-	4,765	3,395
Volunteer support	856	-	-	856	1,142
Other resources expended					
Office equipment	1,407	-	-	1,407	-
Miscellaneous	1,136	-	-	1,136	52
Sub total	41,293	-	-	41,293	30,481
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	41,293	-	-	41,293	30,481
Net of receipts/(payments)	13,595	-	-	13,595	- 12
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	54,875	-	-	54,875	54,887
Cash funds this year end	68,470	-	-	68,470	54,875

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Savings account	55,051	-	-
	Current Account	13,190	-	-
	Petty Cash	229	-	-
	Total cash funds	68,470	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
James Hill	DR JAMES HILL	31/7/23

SOUTH BRENT & DISTRICT CARING

England & Wales - Charity number 1150875

Accounts

South Brent and District Caring

Registered Charity no: 1150875

Principal address: South Brent Old School Community Centre,
Totnes Road, South Brent TQ10 9BP

Report of the Trustees for the Year Ended 31st December 2021

The Trustees have pleasure in presenting their report and the financial statements of the Charity for the period ended 31st December 2021.

Objects and public benefit

The Charitable Objects of South Brent and District Caring are set out in the Deed of Trust signed 11th February 2013 and are as follows:-

- (1) The relief of those persons in need living or residing in the Parish of South Brent and the immediate neighbouring parishes.
- (2) To promote social inclusion for the public benefit among persons, who are excluded from society because they are elderly or by reason of poor mental health, limited financial means, failing health, reduced mobility, or a full-time caring commitment where one is needed.

The Trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit in reviewing the work undertaken during the year. 2021 had been characterised by the fine judgement between protecting clients from Covid-19 infection and addressing the increased loneliness and mental health impact of the lockdown. Restrictions during the pandemic has caused increased isolation and a loss of social confidence among the elderly and produced a range of attitudes to the re-opening of social activities. While some clients have embraced the opportunity to return to the regular social sessions that were the highlight and way markers of their week others have been nervous or lacking the confidence after so long a break. This, along with social distancing requirements has reduced the numbers coming to the regular social events when they have been re-started. The Covid-19 uncertainties have also had varying effects on our pool of volunteers and volunteer drivers and the latter have also more recently been hit by the significant increase in fuel costs.

How the activities have delivered the public benefit

The Charity takes client referrals from family, friends, health-care professionals as well as clients referring themselves. A prominent feature of the work this year has been around bringing the client base back into circulation after lockdown/screening and this includes transport to vaccination centres, carefully arranged social gatherings with the appropriate protection and moving befriending from phone based to face-to-face when the client and volunteer feel comfortable to do so. This difficult operating environment affects some of the numbers on the following page.

People	End of year numbers
Clients	218
Volunteers	149
Friends of Caring	249
Age Range	21 - 100

During the year these are the numbers for the most popular services delivered:

Services	2021 delivery numbers
Befriending	990
Transport	175
Shopping	62
Form Filling & Admin	22

Regular activities that brought people together were reinstated when Government restrictions allowed, but average numbers are low either due to meeting size restrictions or because clients remained uncomfortable socialising while the Coronavirus continued to circulate. The attendance numbers for the year were as follows:

Group sessions	Number of sessions	Average attendance
Coffee morning	18	12
Lunch Club	10	14
Friendsday Wednesday	28	10
Foot care	8	20

Evaluation

Expected client outcomes are associated with each service and accumulate through the year each time the service is delivered. The totals are:

Outcome	Incidences in 2021
Reduced Isolation	2026
Improved health and emotional well being	1971
Increased choice and control	738
Improved quality of life	2033
Freedom from discrimination and harassment	1906
Maintaining personal dignity	1970
Making a positive contribution	782
Economic well being	893

Governance

The Care Services Co-ordinator reports six times a year to the Management Committee and four times a year to the Trustee board along with the Chairman of the Management Committee.

In July 2021 Hattie McCann stepped down as Office Manager and in September Susanne Archard took on the role. The trustees are very grateful to volunteers who helped with office administration during the interregnum.

During the financial period the following Trustees held office:

- John Gower (returned from sabbatical 1st July 2021)
- Jennie Hazell
- James Hill (Chairman)
- John Rawlinson
- Graham Royle
- Lindsey Stewart

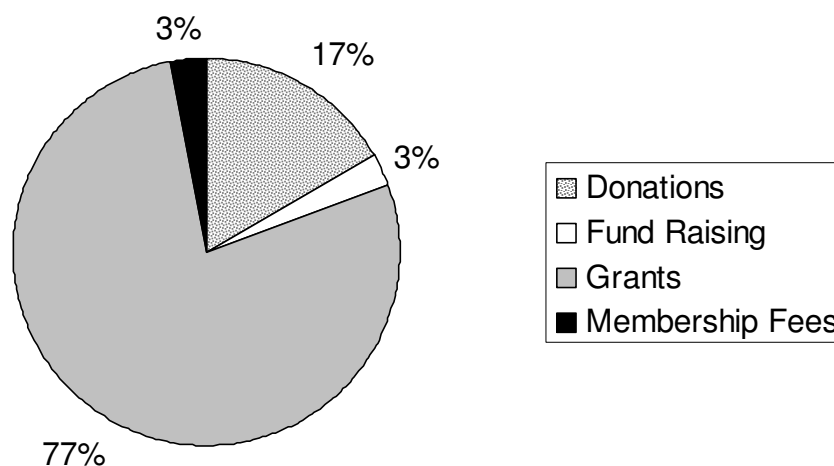
No Trustee expenses were claimed during the year.

Principal Funding Sources

During the financial period grant funding has been gratefully received from The Cooperative Community Fund, South Brent Feoffees, North Huish Feoffees, West Devon Community Transport Scheme. In addition the Charity has received some Government Covid-19 support funding. The Trustees wish to express their sincere gratitude for this funding and the support and recognition given to the work the Charity undertakes.

The Trustees are mindful to control running costs especially during these uncertain times costs for 2021 returned to the pre-pandemic level.

The chart below shows the four main sources of revenue. The revenue from fund raising events was constrained by Covid-19 restrictions because even though there were periods through the year when it was possible to hold events the uncertainty made these very difficult to plan and organise.



Reserves policy

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a minimum level of four months and a maximum of twelve months of unrestricted expenditure. At the end of the financial period the Trustees estimate the Charity holds 20 months operating costs in unrestricted reserves. While this is higher than the maximum set by the policy, it is a judicious stance as the Charity is operating in uncertain and difficult times caused by the after affects of the Covid-19 crisis with costs expecting to rise by at least 20% in 2022 to address the mental health issues and increased isolation caused by the pandemic.

Risk review

The Trustees continue to review risk scoring and mapping the Charity's exposure based on the following risk appetite profile:

- Operational Risk - Minimal
- Conduct Risk - Cautious
- Regulatory Risk - Minimal
- Solvency Risk - Minimal

The Trustees continue to manage risk and review exposure to changes in the operating environment.

Responsibilities of the Trustees

All new Trustees are vetted and receive the latest version of "The Essential Trustee" CC3, the Deed of Trust and an outline of their responsibilities.

Signed on behalf of the Board


.....
James Hill
Chairman of the Board of Trustees

Dated.....30 May 22.....

Independent Examiner's Report to the Trustees of South Brent & District Caring

I report on the accounts of the Charity for the year ended 31st December 2021 set out on pages 7 to 8.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

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 next statement.

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 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 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.

Name: Mrs Felicity M Ferry

Signed: 

Date: 15 - 7 - 2022

Relevant professional qualification or body: ACA

Address: Oakmeade
Exeter Road
South Brent
TQ10 9JP



CHARITY COMMISSION
FOR ENGLAND AND WALES

South Brent & District Caring

1150875

Receipts and payments accounts

CC16a

For the period
from

01 Jan 2021

To

31 Dec 2021

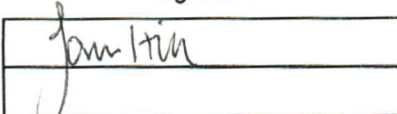
Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Incoming resources from generated funds	-	-	-	-	-
Voluntary income	25,552	-	-	25,552	68,945
Activities for generating funds	2,364	-	-	2,364	555
Investment income	57	-	-	57	120
Incoming resources from charitable activities	-	-	-	-	-
Transport	1,710	-	-	1,710	575
Foot care	785	-	-	785	330
Miscellaneous	1	-	-	1	1
Sub total (Gross income for AR)	30,469	-	-	30,469	70,526
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	30,469	-	-	30,469	70,526
A3 Payments					
Costs of Generating Funds					
Fundraising costs	258	-	-	258	193
Charitable activities					
Care service expenses	2,851	-	-	2,851	795
Covid-19 response	1,734	3,806	-	5,540	15,799
Care coordination & admin services	17,243	-	-	17,243	18,090
Office	3,395	-	-	3,395	2,521
Volunteer support	1,142	-	-	1,142	882
Other resources expended					
Office equipment	-	-	-	-	86
Miscellaneous	52	-	-	52	188
Sub total	26,675	3,806	-	30,481	38,554
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	26,675	3,806	-	30,481	38,554
Net of receipts/(payments)	3,794	- 3,806	-	- 12	31,972
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	51,081	3,806	-	54,887	22,915
Cash funds this year end	54,875	-	-	54,875	54,887

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Savings account	45,000	-	-
	Current Account	9,802	-	-
	Petty Cash	73	-	-
	Total cash funds	54,875	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	DR JAMES HILL	30 MAR 22

SOUTH BRENT & DISTRICT CARING

England & Wales - Charity number 1150875

Accounts

South Brent and District Caring

Registered Charity no: 1150875

Principal address: South Brent Old School Community Centre,
Totnes Road, South Brent TQ10 9BP

Report of the Trustees for the Year Ended 31st December 2020

The Trustees have pleasure in presenting their report and the financial statements of the Charity for the period ended 31st December 2020.

Objects and public benefit

The Charitable Objects of South Brent and District Caring are set out in the Deed of Trust signed 11th February 2013 and are as follows:-

- (1) The relief of those persons in need living or residing in the Parish of South Brent and the immediate neighbouring parishes.
- (2) To promote social inclusion for the public benefit among persons, who are excluded from society because they are elderly or by reason of poor mental health, limited financial means, failing health, reduced mobility, or a full-time caring commitment where one is needed.

The Trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit in reviewing the work undertaken during the year. As a community caring organisation the Trustees decided it was appropriate to take a central role in providing assistance to all residents in need during the Covid-19 pandemic. At the same time many of the Charity's normal methods to tackle loneliness; social inclusion and assist with healthcare were terminated in accordance with Government restrictions. The Charity quickly moved to working from home and re-organised business processes. New services were brought on-stream to serve everyone in South Brent, Avonwick and North Huish needing help during the pandemic and a corresponding volunteer network was put in place. A report on the response to the Covid-19 crisis is included on page 5.

How the activities have delivered the public benefit

The Charity takes client referrals from family, friends, health-care professionals as well as clients referring themselves. The Covid-19 crisis caused a number of new referrals, although help during the crisis was provided to any resident in need so these registered client numbers do not reflect the total number of people helped during the crisis.

Client numbers

Start of year	193
New referrals	41
Clients left during the year	3
End of year total	231

Age profile of all clients

Average age	81
Min Age	50
Max Age	100

Service provision numbers also come with notes regarding the crisis:

Services	2020 delivery numbers	No of clients
Befriending	1454	74
Transport	28	14
Shopping	74	7
Form Filling & Admin	28	10

Befriending: The number includes pre-pandemic home visits and phone befriending during the pandemic

Transport: Shown is the transport numbers completed before the March 2020 lockdown

Shopping: Is for the whole year where the client has called the Charity for a specific request, however most of the shopping during the crisis is covered in the South Brent Assist report on page 5

Form Filling: Figures cover the year; some form filling was possible over the phone during lockdown.

Regular activities that brought people together were cancelled during the March 2020 lockdown. Due to the age profile of our clients, these activities were for the most part not re-opened when restrictions were lifted during the summer, however Foot care and the Memory café were run with reduced numbers when safe and permitted in the second half of 2020. The attendance numbers for the year were as follows:

	Number of sessions	Average attendance
Coffee morning	5	18
Lunch Club	5	32
Memory café	16	25
Foot care	6	16

Evaluation

Expected client outcomes are associated with each service and accumulate through the year each time the service is delivered. The totals are as shown on the following page:

Outcome	Incidences in 2020
Reduced Isolation	2029
Improved health and emotional well being	1978
Increased choice and control	370
Improved quality of life	2036
Freedom from discrimination and harassment	1721
Maintaining personal dignity	1952
Making a positive contribution	410
Economic well being	333

Governance

The Care Services Co-ordinator usually reports six times a year to the Management Committee and four times a year to the Trustee board along with the Chairman of the Management Committee, however during the Covid-19 crisis weekly meetings with a broader representation of local groups were used to govern the all consuming response to the pandemic.

In response to family considerations Viv Sweeney and Kay Gauty resigned from the Charity at the start of the Pandemic and Jane & Robyn Sullivan provided Care Services Co-ordination by putting in long hours as a family bubble from their home. In July 2020 Hattie McCann joined the office and took over responsibilities from Robyn.

During the financial period the following Trustees held office:

- John Gower (retired 31st December 2020)
- Jennie Hazell
- James Hill (Chairman)
- John Rawlinson
- Graham Royle (appointed 29th October 2020)
- Lindsey Stewart

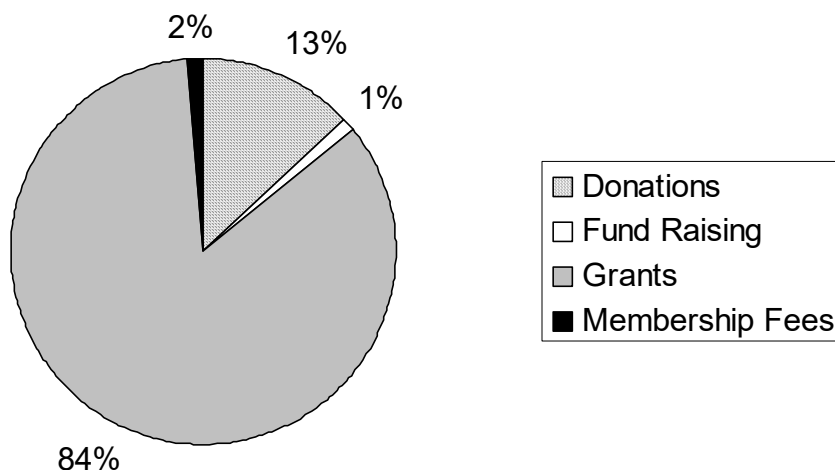
No Trustee expenses were claimed during the year.

Principal Funding Sources

During the financial period grant funding has been gratefully received from Awards 4 All, CAF Bank, Cooperative Community Fund, Dartmoor National Park, Devon Community Foundation, Devon County Council, Feoffees, Neighbourly, Rattery Parochial Church Council, Rattery Parish Council, South Brent Feoffees, South Brent Parish Council, South Hams CVS, South Hams District Council, Sustainable South Brent, Tesco Community Grants, West Devon CVS, Western Power Distribution, The Yapp Charitable Trust. The Trustees wish to express their sincere gratitude for this funding and the support and recognition given to the work the Charity undertakes.

The Trustees are mindful to control running costs especially in what has been a difficult year with additional expenses involved with mounting an effective response to the pandemic. Despite many of the usual activities being cancelled, expenses increased 25% on the previous year. Thankfully this was more than matched by the organisations listed above and private donors supporting charities like ours providing help during the Covid-19 crisis and the accounts show an operating surplus for the year of £31,972 putting the Charity in a strong position at the end of the year as local infection rates rise to their highest level throughout the pandemic.

The chart over page shows the four main sources of funding the extraordinary year is illustrated in particular by the revenue from fund raising as most events have been cancelled the contribution fell from 24% last year to just 1% in 2020. Conversely grant funding has risen from 52% to 84%



Reserves policy

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a minimum level of four months and a maximum of twelve months unrestricted expenditure. At the end of the financial period the Trustees estimate the Charity holds 15 months operating costs in unrestricted reserves. While this is higher than the maximum set by the policy, it is understood that this is a consequence of an extraordinary year and a snapshot amid the Covid-19 crisis when the Charity's expenses are higher than normal times. As such it is regarded as a strong position in the face of adversity and not a point of concern.

Risk review

The Trustees continue to review risk scoring and mapping the Charity's exposure based on the following risk appetite profile:

- Operational Risk - Minimal
- Conduct Risk - Cautious
- Regulatory Risk - Minimal
- Solvency Risk - Minimal

The Trustees continue to manage risk and review exposure to changes in the operating environment.

Responsibilities of the Trustees

All new Trustees are vetted and receive the latest version of "The Essential Trustee" CC3, the Deed of Trust and an outline of their responsibilities.

Signed on behalf of the Board



 James Hill

Dated.....19 May 21.....

Chairman of the Board of Trustees

SOUTH BRENT ASSIST

'South Brent Assist' is a project developed under the auspices of South Brent & District Caring (SB&DC) in order to support those in and around South Brent who need help during the coronavirus epidemic. The existing charitable financial structure, management systems and volunteer co-ordination processes of South Brent & District Caring enabled this to be established quickly and managed effectively.

The organisation of South Brent Assist is overseen by the **South Brent Community Crisis Assistance Coordination Group**, established in order to facilitate collaboration between SB&DC and other organisations in the South Brent area. The group was convened on 19 March 2020 and is chaired by Rev Prof Gina Radford. Meetings were initially held weekly and are now fortnightly. Participants are drawn from a range of South Brent organisations, including South Brent Parish Council and South Brent & District Caring trustees.

Early strategic planning by the co-ordination group enabled crisis support to get off the ground quickly. As the pandemic developed and the effect of the lockdown imposed on 23 March 2020 became apparent, local needs were identified or anticipated, and met as they arose. Initially the focus was on establishing need, seeking the financial resources required - including grants and donations, and co-ordinating the large pool of volunteers who quickly came forward.

The co-ordination group focused on:

- meeting the current demands of the increasing pandemic
- forward planning in the medium term for likely effects of a relaxation of lockdown
- contingency planning and maintaining capacity to respond to a possible second 'spike'.

A range of methods was used to try to make sure that information reached the most vulnerable and isolated during the Covid-19 outbreak. Information leaflets were designed, printed and delivered at the beginning of lockdown to each household, followed two weeks later by an updated leaflet. Posters were also prominently displayed around the village. South Brent & District Caring's [existing website](#) was adapted so that its outward-facing home-page focussed on local crisis information. A [South Brent Crisis Assist Facebook page](#) was set up as a social media link to signpost people to local support facilities and provide a village platform for communicating information about the availability of resources, offers of help, support etc.

These activities included:

Assistance to those in need:

- Help for a range of needs, including delivering essential shopping or meals to people who are shielding or isolating. So far this has included over 800 deliveries from The Village Shop, Foggs and South Brent Pharmacy.
- Importantly, deliveries include prescriptions for people who are shielding or isolating and hearing aid batteries.
- Meals: Volunteers have also made at least 5 deliveries of takeaway food from the Packhorse on 4 days per week, (i.e. approx. 20 deliveries per week over 17 weeks = 340 deliveries).
- A short term food bank within the village was established. This is aimed at those experiencing financial hardship, shielding or self-isolating. Space has been rented at the Old School Community Centre to accommodate the food bank. There have been 50 deliveries to 15 households, reaching 149 people in total (85 adults, 64 children of 16 and under)

Co-ordinating volunteers:

- The above services have all been provided by volunteers. Over 170 people have come forward as volunteers, with about half this number currently being used. Since the easing of lockdown, with furloughed individuals gradually returning to work, the number available has also dropped. The volunteers have been co-ordinated day to day by the staff of South Brent & District Caring. Paid staff hours were increased to cover the additional COVID-19 related needs.



A volunteer delivering pharmacy supplies



Volunteering at the food-bank

Co-ordinating other offers of help and donations:

- Coordinating financial help: the charity's financial systems have enabled the management and proper accounting of increased giving to the charity generally, and also of donations restricted to specific, crisis-related activities such as the Food Bank.

Other activities:

- A volunteer phone befriending service makes calls to those in isolation, helping to compensate for the suspension of the physical befriending service and South Brent & District Caring's regular 'Lunch Club' and 'Wednesday Club' (both aimed at people who are elderly or isolated). The team of callers so far have made just over 1500 befriending calls, including around 400 made by the co-ordinator
- Wellbeing advice or mental health support – a helpline has been set up by local counsellors, coaches, and therapists offering a dedicated listening service with mental health signposting where needed.
- Facilitating local shops, pharmacy and food and takeaways in the provision of COVID safe services

A critical challenge was presented by the need to move out of SB&DC's office base at the Old School Community Centre (OSCC) and to develop ways in which the co-ordinator could manage day to day operations on-line from home. It quickly became apparent that due to personal circumstances the Office Manager was unable to work from home, so new temporary staff were quickly brought in and trained to cover the office management work.

It has become apparent that the SB&DC office is too small at 10m² to re-open safely for our staff and visitors, many of whom are elderly and vulnerable. To provide proper distancing we plan to use some of the funding raised to enable a move quickly to a larger room at the OSCC and install forced air ventilation to HSE guidance HSG202.

There is a need to consider the future, balancing risk and preparedness while maintaining the financial propriety required of a charity. '*After First Lockdown*', a discussion paper prepared for the trustees by John Gower and later put before the South Brent Assist Crisis Coordination group gave sharp clarity to the options, and has enabled contingency planning.

The response of donors has been wonderful and South Brent Assist and South Brent & District Caring thank all donors, from individual villagers to larger organisations and funding bodies, both for their original generosity, and their agreement to flexibility in the future use of funds to be retained for any second peak or extended lockdown.

The legacy of this difficult period, (which is not yet over) now appears to be a clear plan and financial and organisational structure in place for any future peak in the pandemic. South Brent & District Caring, has not only survived, but emerged as a robust organisation with a new 'COVID safe' base, in an appreciative village, in which community cohesiveness, kindness and generosity has been amply demonstrated.

Independent Examiner's Report to the Trustees of South Brent & District Caring

I report on the accounts of the Charity for the year ended 31st December 2020 set out on pages 9 to 10.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

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 next statement.

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 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 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.

Name: Mrs Felicity M Ferry

Signed: 

Date: 15 August 2021

Relevant professional qualification or body: ACA

Address: Oakmeade
Exeter Road
South Brent
TQ10 9JP



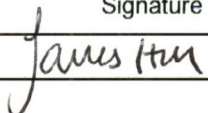
CHARITY COMMISSION
FOR ENGLAND AND WALES

South Brent & District Caring		1150875		CC16a
Receipts and payments accounts				
For the period from	01 Jan 2020	To	31 Dec 2020	

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Incoming resources from generated funds	-	-	-	-	-
Voluntary income	49,340	19,605	-	68,945	16,881
Activities for generating funds	555	-	-	555	5,193
Investment income	120	-	-	120	170
Incoming resources from charitable activities	-	-	-	-	-
Transport	575	-	-	575	1,832
Foot care	330	-	-	330	883
Miscellaneous	1	-	-	1	4
Sub total (Gross income for AR)	50,921	19,605	-	70,526	24,963
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	50,921	19,605	-	70,526	24,963
A3 Payments					
Costs of Generating Funds					
Fundraising costs	193	-	-	193	1,966
Charitable activities					
Care service expenses	795	-	-	795	1,089
Covid-19 response	-	15,799	-	15,799	1,667
Care Co-ordinator	18,090	-	-	18,090	21,758
Office	2,521	-	-	2,521	2,839
Volunteer support	882	-	-	882	989
Other resources expended					
Office equipment	86	-	-	86	310
Miscellaneous	188	-	-	188	87
Sub total	22,755	15,799	-	38,554	30,705
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	22,755	15,799	-	38,554	30,705
Net of receipts/(payments)	28,166	3,806	-	31,972	- 5,742
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	22,915	-	-	22,915	28,657
Cash funds this year end	51,081	3,806	-	54,887	22,915

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Savings account	40,582	3,806	-
	Current Account	10,322	-	-
	Petty Cash	177	-	-
	Total cash funds	51,081	3,806	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
			DR JAMES HILL	19 MAR 21