

## 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 31<sup>st</sup> December 2020**

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

#### **Objects and public benefit**

The Charitable Objects of South Brent and District Caring are set out in the Deed of Trust signed 11<sup>th</sup> 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:

<b>Services</b>	<b>2020 delivery numbers</b>	<b>No of clients</b>
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:

<b>Outcome</b>	<b>Incidences in 2020</b>
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 Gautry 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 31<sup>st</sup> December 2020)
- Jennie Hazell
- James Hill (Chairman)
- John Rawlinson
- Graham Royle (appointed 29<sup>th</sup> October 2020)
- Lindsey Stewart

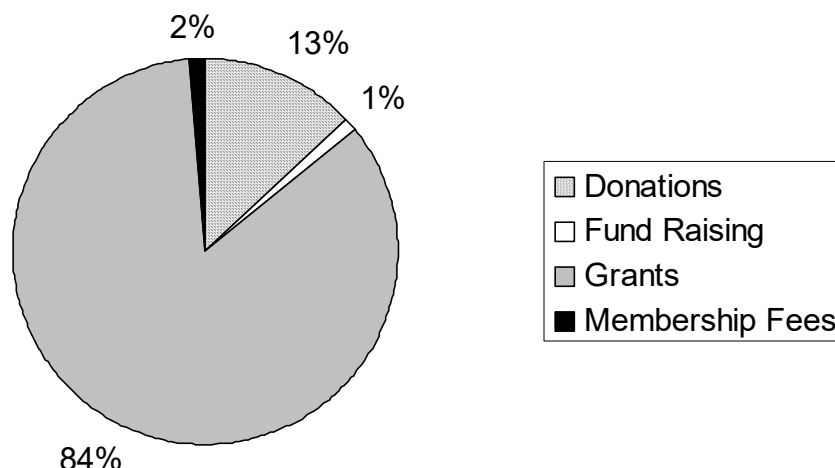
No Trustee expenses were claimed during the year.

## **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

Chairman of the Board of Trustees

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

## 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 10m<sup>2</sup> 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 31<sup>st</sup> 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





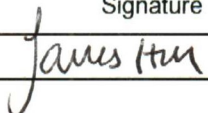
CHARITY COMMISSION  
FOR ENGLAND AND WALES

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 £
<b>A1 Receipts</b>					
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
<b>Sub total (Gross income for AR)</b>	<b>50,921</b>	<b>19,605</b>	<b>-</b>	<b>70,526</b>	<b>24,963</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>50,921</b>	<b>19,605</b>	<b>-</b>	<b>70,526</b>	<b>24,963</b>
<b>A3 Payments</b>					
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
<b>Sub total</b>	<b>22,755</b>	<b>15,799</b>	<b>-</b>	<b>38,554</b>	<b>30,705</b>
<b>A4 Asset and investment purchases. (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>22,755</b>	<b>15,799</b>	<b>-</b>	<b>38,554</b>	<b>30,705</b>
<b>Net of receipts/(payments)</b>	<b>28,166</b>	<b>3,806</b>	<b>-</b>	<b>31,972</b>	<b>- 5,742</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>22,915</b>	<b>-</b>	<b>-</b>	<b>22,915</b>	<b>28,657</b>
<b>Cash funds this year end</b>	<b>51,081</b>	<b>3,806</b>	<b>-</b>	<b>54,887</b>	<b>22,915</b>

## 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 £
<b>B1 Cash funds</b>	Savings account	40,582	3,806	-
	Current Account	10,322	-	-
	Petty Cash	177	-	-
	<b>Total cash funds</b>	<b>51,081</b>	<b>3,806</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	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