

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

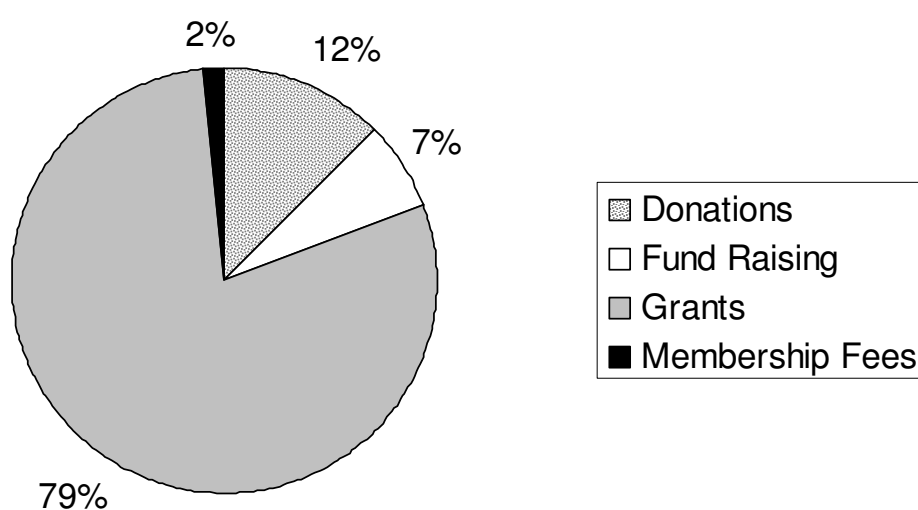
No Trustee expenses were claimed during the year.

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


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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:

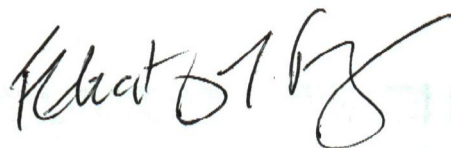
- to keep accounting records in accordance with section 130 of the 2011 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

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

Receipts and payments accounts

CC16a

For the period
from

01 Jan 2022

To

31 Dec 2022

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	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
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
James Hill	DR JAMES HILL	31/7/23