

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

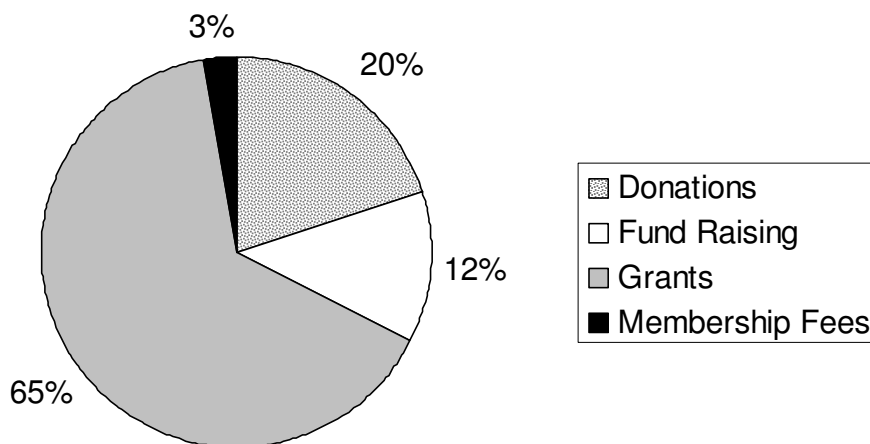
At their meeting on 1st August 2023 the Trustees agreed to incorporate the Charity by conversion to a CIO. A constitution was drafted and signed 30th August 2023 the new CIO was registered with the Charity Commission 25th September 2023 (Charity number: 1204911). The plan is to merge (convert) the Charity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

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:

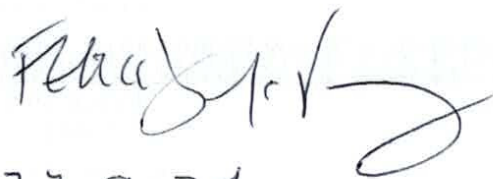
- to keep accounting records in accordance with section 130 of the 2011 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

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



CHARITY COMMISSION
FOR ENGLAND AND WALES

South Brent & District Caring

1150875

Receipts and payments accounts

CC16a

For the period
from

01 Jan 2023

To

31 Dec 2023

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	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
		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	
	James Hill	DR JAMES HILL	30/5/24	