

The Beer-Harris Memorial Trust

(formerly The Dominic Beer Memorial Trust)

Trustees Annual Report and Accounts for the year 6th April 2021 to 5th April 2022

Registered Charity Number: 1155652

Charity's Principle Address:

Stockland House, Low Road, Church Lench, Evesham, Worcestershire WR11 4UH

Trustees:

Charles Beer
Joshua Beer
Naomi Beer
Susanna Beer

Miranda Harris
Roy Harris
John Milk

Governing document

Trust deed dated 03/05/2013 as amended by deed dated 28/01/2014, by deed dated 27/02/2018 & by deed dated 18/05/2020

Charitable Objects:

(1) The relief of sickness, particularly but not exclusively, mental illness including (a) supporting the provision for the public benefit of advice and counselling with particular but not exclusive focus on the marginalised and the most vulnerable, and (b) supporting research into mental illness and ways of enhancing the health and well-being of patients

(2) To promote social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded and assisting them to integrate into society by supporting organisations that promote social inclusion or by supporting research into the areas of mental health and social exclusion

(3) To support projects and research in the mental health field that reflect the values and principles held by the Trust's namesakes, namely inclusivity, integrity, compassion, respect, gratitude and hope.

Background

In 2013, Dr Dominic Beer, psychiatrist and leading light in the field of 'Challenging Behaviour' (patients suffering severe mental illness) died. This charity was set up in his name and among our trustees was Dominic's nephew, Joseph Harris. Joseph was a young man who cared passionately for justice and especially for those suffering from mental illness. He was one of the Trust's main fundraisers until his tragic death in November 2017. As a tribute to his memory, and in recognition of his service to the Trust and his aspirations for what the Trust might achieve the trustees agreed to change the name of the Trust from the Dominic Beer Memorial Trust to the Beer-Harris Memorial Trust.

Review of the year - Achievements and performance

The Trust initiated a wide range of successful fundraising activities during the year. It continues to make grants either to community based projects or to research projects that are for the benefit of patients with mental health problems with an emphasis (but not exclusive) on patients suffering from severe mental illness. The board met to discuss the distribution of funds to various projects. Grants were made to the following projects: Hope Into Action, Oakleaf, Just Life, Maytree, Maggs Day Centre, EDMHSS, Church Army, Tastelife, SLTHorses and YANA.

Financial Review

The Trust raised funds of £37,308 during the year and spent £33,790 as detailed below. Cash funds at the end of the year were £53,690, all of which was unrestricted.

The Trust hasn't yet set a Reserves policy, but the trustees are confident that the funds held are more than sufficient to continue to meet its own running cost as well as to continue making grants as detailed above.

The Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Approved by the trustees and signed on their behalf by

Roy Harris

Trustee

Date: 31st January 2023

The Beer-Harris Memorial Trust

Receipts and Payments Accounts for the year 6th April 2021 to 5th April 2022

	Unrestricted Funds £	Restricted Funds £	2022 Total Funds £	2021 Total £
Receipts				
Donations (including Gift Aid reclaimed)	28,058		28,058	30,265
Income from fundraising events	9,250		9,250	0
Sales	0		0	182
Total	37,308	0	37,308	30,447
Payments				
Grants made	14,863		14,863	11,000
Fundraising costs	16,665		16,665	10,000
Administrative, media & accounting expense:	2,262		2,262	2,150
Total	33,790	0	33,790	23,150
Net income	3,518	0	3,518	7,297
Cash funds at 6th April 2021	50,172	0	50,172	42,875
Cash funds at 5th April 2022	53,690	0	53,690	50,172

Statement of assets and liabilities at the end of the year

	2022 £	2021 £
Cash Funds:		
Cash in bank	53,410	50,158
Paypal account	280	14
	53,690	50,172
Other assets: gift aid due	501	406
Liabilities: fees & expenses due	5,400	5,600
Total	48,791	44,978

Approved by the trustees and signed on their behalf by

Roy Harris
Trustee

Date: 31st January 2023

Independent Examiner's report to the Trustees of The Beer-Harris Memorial Trust

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 5th April 2022

Responsibilities and basis of report

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Gordon Cowie

Address: 134 Foxberry Road, London SE4 2SH

Date: 31st January 2023