

The Beer-Harris Memorial Trust

(formerly The Dominic Beer Memorial Trust)

Trustees Annual Report and Accounts for the year 6th April 2023 to 5th April 2024

Registered Charity Number: 1155652

Charity's Principle Address:

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

Trustees:

Charles Beer
Joshua Beer
Emily Standen

Miranda Harris
Roy Harris
Georgina Szanto from 01/01/2024

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: Just Life, Hope Into Action, Oakleaf, Maggs Day Centre, Off the Fence, Tastelife, Music in Hospitals, SIS, Beder, Off the Streets, Arise, Freedom, Brendans Bridge and GRow for Life.

Financial Review

The Trust raised funds of £31,369 during the year and spent £28,958 as detailed below. Cash funds at the end of the year were £36,456 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

Miranda D Harris
Trustee & Trust Administrator/CEO
Date: 28 June 2024

The Beer-Harris Memorial Trust

Receipts and Payments Accounts for the year 6th April 2023 to 5th April 2024

	Unrestricted Funds £	Restricted Funds £	2024 Total Funds £	2023 Total £
Receipts				
Donations (including Gift Aid reclaimed)	25,391		25,391	16,882
Sales & Income from fundraising events	5,978		5,978	5,582
Total	31,369	0	31,369	22,464
Payments				
Grants made	22,655		22,655	25,621
Fundraising costs	4,164		4,164	14,473
Administrative, media & accounting expense:	2,139		2,139	2,015
Total	28,958	0	28,958	42,109
Receipts minus Payments	2,411	0	2,411	-19,645
Cash funds at 6th April 2023	34,045	0	34,045	53,690
Cash funds at 5th April 2024	36,456	0	36,456	34,045

Statement of assets and liabilities at the end of the year

	2024 £	2023 £
Cash Funds:		
Cash in bank	36,452	34,015
Paypal account	4	30
	36,456	34,045
Other assets:		
gift aid due	633	633
due from JustGiving	375	
	1,008	633
Liabilities: fees & expenses due	550	400
Total	36,914	34,278

Approved by the trustees and signed on their behalf by

Miranda D Harris
Trustee & Trust Administrator

Date: 28 June 2024

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 2024

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: 28 June 2024