



CHARITABLE INCORPORATED ORGANISATION 1157919  
REGISTERED 21 JUL 2014

## **MOORLAND COMMUNITY CARE GROUP**

### **Trustees Report and Accounts for the year ended 31 December 2020**

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## Legal and Administrative Information

The charity is registered and is a Charitable Incorporated Organisation.

CIO Registered Number: 1157919

## Trustees

The Trustees serving during the year and since the year end were as follows:

- Rev Kevin Hooke (Chair)
- Mrs Muriel Rumford
- Ms Linda Griesell – resigned 13<sup>th</sup> April 2021
- Mrs Susan Clutton
- Ms Valerie Browning
- Mrs Jenny Wigram
- Ms Stella West-Harling
- Mr Robert Bradshaw (Secretary)
- Ms Susan Hurrell (Treasurer)

### Registered Office

135 Churchfields Drive  
Bovey Tracey  
Newton Abbot  
TQ13 9QZ

### Bank

Lloyds Bank  
41 Courtenay Street  
Newton Abbot  
TQ12 2QW

### Independent Examiner

Marianne Barrett Rogers FCA CTA FALA  
22 Union Street  
Newton Abbot  
TQ12 2JS

**Moorland Community Care Group**  
**Trustees Report for the Year Ending 31<sup>st</sup> December 2020**

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The Trustees present their report and accounts for the year ended 31 December 2020.  
The accounts have been prepared in accordance with the Charities Commission guidance for Independent Examination of Charity Accounts and the Charity's Governing Document.

**Objectives and Activities**

The objects of the Charity are:

to promote social inclusion for the public benefit by preventing people living in the towns of Bovey Tracey, Ashburton and Buckfastleigh, all in Devon, together with their adjacent parishes, from becoming socially excluded, relieving the needs of those people who are socially excluded and assisting them to integrate into society.

for the purpose of this clause 'socially excluded' means being excluded from society, or parts of society, as a result of one or more of the following factors: unemployment; financial hardship; youth or old age; ill health (physical or mental); substance abuse or dependency including alcohol and drugs; discrimination on the grounds of sex, race, disability, ethnic origin, religion, belief, creed, sexual orientation or gender re-assignment; poor educational or skills attainment; relationship and family breakdown; poor housing (that is housing that does not meet basic habitable standards; crime (either as a victim of crime or as an offender rehabilitating into society).

**Public Benefit**

The Charity's main activities and beneficiaries are identified in the review below. The Trustees confirm that they have referred to Charity Commission guidance on public benefit and are satisfied that the organisation's activities conform with these requirements. All of the charity's activities are to benefit those most disadvantaged in our area of benefit and some of the activities are delivered in partnership with other voluntary and community groups to further the organisation's charitable purpose for the public benefit.

**Achievements and Performance**

Alongside every other charity in the UK, our plans and activities during 2020 have been shaped by the impact of the Covid pandemic.

The whole team at Moorland Community Care Group – trustees, staff members and volunteers - have worked incredibly hard to continue to support our clients during this year. The people we support have also shown great flexibility and resilience during this time.

Our stated plans for 2020 included a renewed emphasis on social activities, including for people living with dementia and people near the end of their life. We were looking forward to supporting people get to the cinema, enjoy trips to the seaside and to gather for social groups.

We planned to establish a new monthly Memory Café in Buckfastleigh, in partnership with St Luke's Church. We planned a cookery group for men living alone who needed a boost to their skills.

In Spring 2020, Covid restrictions meant a huge change to the way we went about our work. For a charity whose work is all about trying to reduce social isolation and support people's wellbeing, the impact of repeated lockdowns and restrictions on much of everyday life was (and remains) significant.

Our response to Covid was innovative and speedy.

Much of our work that took place directly, face to face with clients, moved to the telephone. Our terrific team of volunteers continued to offer clients regular befriending meetings over the phone and whilst that doesn't exactly replicate the experience of a physical meeting, it meant that we could offer regular, safe, contact to combat some of the isolation and loneliness that some people inevitably experienced.

Our trustees and staff team were quickly active in local Covid Response groups, working in partnership with local councils, charities, churches and businesses to build community responses to local need; co-ordinating the provision of food and practical and emotional support to our towns and communities.

And alongside our continued befriending and wellbeing support, here at Moorland we started an innovative 'day centre on the phone' from scratch, establishing a daily programme of social and creative activities using group telephone calls. This development has proved hugely popular and meant that dozens of people (often very isolated and unable to get out of their homes during Covid) were able to participate in regular, fun and free social gatherings. We'll tell you more about this below.

We also devoted time in 2020 to look towards the future development of Moorland Community Care Group. Trustees commissioned a report into the future of the organisation, leading in October 2020 to the appointment of a manager for the charity to lead on operational and strategic management (and in late 2020 the recruitment of a volunteer co-ordinator to lead on recruitment, training and support of volunteers) and an aim to strengthen governance, funding and capacity of the charity to maintain and develop its role as a stand-alone body and as part of the South Devon Wellbeing Partnership.

The end of 2020 sees us still in the midst of the pandemic with continued lockdown and social restrictions in place. It has undoubtedly been a tough time for everyone involved in the charity – the team continue to work remotely and alone for much of the time, our volunteers continue to provide regular support for clients over the phone and our telephone groups remain active and popular, but many people we work with were isolated and lonely before Covid affected our ability to be alongside other people and we know that some of the people we support crave social contact, while also understandably fearing the potential health impacts of the virus.

We'll do our best during 2021 to keep supporting local people's health and wellbeing. Thank you to everyone who's worked alongside us during this difficult year.

I've only been in post as Manager with Moorland Community Care Group since October 2020, so I'd like my colleagues to tell you more about this last year...

...Here's more about the fantastic work we did during 2020 as described by our team of Wellbeing Co-ordinators;

#### **Our Dementia and End of Life service**

***Jayne Edwards, Dementia and End of Life Co-ordinator***

#### **Connectivity**

A lot of our work focused on navigating the maze of health and social care support services for clients, helping to reduce the repetition of form-filling and connecting those services most appropriate to patients' care.

We work closely with a range of partners to support our clients; the Older Peoples Mental Health Team, GPs, Social Workers, District Nurses, Occupational Health teams, Occupational Therapists, Dieticians, the local council as well as other charities such as Age UK and Rowcroft.

#### **Coaching Carers**

Reinstating the identity and personality of those caring for someone living with dementia has always been a key component of my work. I support carers to develop techniques that help them manage their personal time, rebuild friendships and hobbies away from their loved one as that personal focus has shown to be successful in helping carers to cope, particularly in dealing with the twilight hours, when their loved ones often live through the 'sundowning' phenomenon - a more confused and agitated time. This proved challenging in 2020 due to the pandemic, with those able to connect online proving more fortunate than those who could not.

### **Focusing on what's important to someone; "This is me", an Alzheimer's Society resource**

I work alongside all my clients to complete this Alzheimer's Society resource. The booklet 'This is me' ensures that a person's cultural and family background, important events, people and places as well as their preferences and routines are identified and can be shared with professionals, with the aim that a client experiences a more personalised and contextualised service.

### **Memory Walks**

'Walking for Health Walks' took place fortnightly until the first Lock down in March 2020. Participants thrived during this time and the inclusivity and diversity amongst those walking provided a positive experience.

### **Memory Cafés**

Memory Cafes in Ashburton and Bovey Tracey were suspended in March 2020. Previously these had gleaned many new clients – from which other agencies and services were accessed in support of clients and their carers/families. The plan to open a new café in Buckfastleigh was put on hold due to the pandemic.

### **Covid-19**

The effect of covid had serious repercussions for clients, especially those living alone. The lack of social interaction with family and friends and, indeed, lack of professional visits impacted negatively upon people. Initially there was a steer towards regular phone calls and linking in with town support for shopping; then a focus on phone activities with dementia-friendly quizzes. The changing roadmap out of lockdown inevitably resulted in reduced visits. That said, we were able to advocate on behalf of clients, especially with the Older People's Mental Health Team and Social Care, resulting in packages of care for people living with dementia.

### **Looking ahead**

Looking ahead to 2021 is very different to looking ahead to 2020. We hope that a renewed emphasis on social activities through funding granted for those living with dementia and end of life will be able to take place. Digital pathways will be further explored. Much of our success though, lies with face to face visits, listening to people, building relationships and confidence for families and we hope we'll be able to look forward to doing that more in 2021.

### **Community Connections – our day centre on the phone**

***Sara Hurley, activities co-ordinator***

June 8th 2020 was a big day for us in this year of pandemic.

That day saw the start of our innovative programme of social groups on the phone. These group calls were a progression from the 1-1 telephone befriending 'check in and chat' service that had supported so many individuals during the first lockdown. Our first week of group calls had six activities available which quickly expanded to ten social groups each week; morning and afternoon groups five days a week from Mondays to Fridays.

A range of groups were offered to appeal to a variety of interests and be accessible to as broad a range of clients as possible, including: crosswords & quizzes, relaxation, music, poetry, reminiscence, talks, seated exercise and our ever-popular bingo. Most groups are dementia-friendly and accommodating to people with mental & physical health conditions. Being able to reach housebound people and involve them in a group activity was a revelation for both staff and participants.

In October 2020 we successfully secured £22,800 in funding from the National Lottery Emergency Covid fund. This funding will enable us to continue phone group activities until April 2021.

The groups have proved hugely popular. We're currently reaching around 80 people with the groups, with around 50 people regularly attending several groups during any one week.

We've shared our concept and learning with 10 partner organisations, some of whom have gone on to set up their own schemes. We are immensely grateful to five of our volunteers who have been invaluable to the success of our Community Connections project, both behind the scenes making reminder calls for people to join groups and in leading groups themselves.

'Behind the scenes reminder calls' have been an effective way of helping to reduce isolation, and alongside keeping close contact with facilitators, they have helped us monitor changes in participant's cognition, mental health, anxiety and wellbeing.

Participants have often come from our existing client caseloads alongside new referrals from Social Prescribers and other statutory partners. New friendships have been formed between participants at the groups, some peer telephone befriending has begun, and it's been an excellent way to provide a consistent service across all of our area of benefit.

The Community Connections lottery project funded the beginning of a digital trial, aimed at increasing ways of people staying connected with one another and the wider world. A soft start has allowed us to learn how to support individuals with their unique digital access needs. A survey of 22 existing users of the telephone groups gave us vital information which informed next steps. Three people have been set up with Moorland-owned tablets with the help of an IT specialist and we plan to launch trial online social groups called 'Internet Explorers' early in 2021.

**We're really pleased about how the project has gone. But don't take our word for it....here's a flavor of some of the feedback we've had about the project**

*It's absolutely amazing. Everything is really good, in fact it surpasses how good I thought it would be. For people like me who are on their own with no-one to talk to except the cat, it's absolutely brilliant. All of it. I especially enjoy the Friday morning relaxation session and guided visualisation.*

*What you do is great! I love coming to Brenda's quiz and bingo. I enjoy her company and talking to her and being part of the group.*

*It's absolutely uplifting coming to the groups. You feel like you're getting to know people even though you can't see their faces.*

*I love it, it's been a great boon to me I would have climbed up the walls without it. I've told so many people about it. I've really enjoyed the Dartmoor talks.*

**Being part of an innovative community response to Covid**  
**Suzy Williamson, Wellbeing Co-ordinator**

When Covid lockdown was announced, it was clear our services would be needed, but deployed in new ways. In Bovey Tracey, trustees were instrumental in creating a robust Covid response team, working in partnership with the local Spar supermarket, church groups, councillors and local people to provide shopping, phone calls and other support to the town's vulnerable population.

In Ashburton, we drew together the team that would go on to become a strong Covid response group with participants from the town council, local churches and local people, and in Buckfastleigh, we joined the Covid response team that was led by local town councillors and members of the armed forces and local church.

Local food banks played a vital role in supporting vulnerable people, medicines were delivered to isolated and shielding residents, shopping collected from Spar and other shops offered payment over the phone.

The Ashburton Covid team set up a relationship with Lloyds chemists, supported with funding from the council given to Lloyds to use to enable people who were shielding to buy necessary goods. Another innovation and success was the purchase of a black taxi cab to help vulnerable and isolated people get to hospital and other appointments. Building on our close working relationship with the local patient transport service, DASH, we saw that a new Covid-secure transport solution was required and a traditional black cab with partition to

separate driver and passenger would provide a quick and safe solution to helping people get around whilst maintaining social distancing requirements.

The League of Friends and volunteer drivers stepped in to provide an extraordinary service; taking vulnerable people to essential medical appointments and key workers to their place of work. The service ran throughout the year and served Ashburton, Buckfastleigh and also Bovey Tracey, where no similar service was available.

A dedicated helpline was set up to underpin the service, with volunteers available during the day and evenings and initially, offering a night-time standby service. An IT system and social media groups were established for recording all calls and enabling different teams to respond according to need.

One of our main roles as part of the local Covid response was to mobilise volunteers to provide welfare support. We created a strong structure with sub-teams available to take distress calls that came through to the main helpline each day, make follow up calls to every caller to the helpline to check if there were any welfare needs as yet undisclosed and a 'check in and chat' service offering support calls to people feeling isolated.

At its peak, we were organising 140 calls a week across Ashburton and Buckfastleigh, with a small number of clients receiving calls twice daily to ensure their safety. This included people living in very challenging domestic situations, people who had been bereaved and people who are living with dementia.

It was important to keep volunteers and clients safe through this service. With emergency lifting of the need for checks under the Disclosure and Barring Scheme (DBS), we ensured all volunteers were known to the Covid response teams and trained, with regular online support sessions. In Buckfastleigh we created small teams of volunteers who called their clients on rotation and also supported each other. In Ashburton, we recruited a retired senior psychotherapist to lead the team matching volunteers with clients and supporting the volunteers.

Ultimately, the daily helpline welfare response service was not needed and those volunteers were redeployed elsewhere. By September 2020, we began the transfer of any clients who needed ongoing support to our service at Moorland instead of the Covid Response service and recruited a small number of the Covid volunteers to become Moorland volunteers. The majority of volunteer had to return to work or family duties as restrictions eased. Each one was thanked for their service and we know it was a positive experience for those who were involved.

#### **In conclusion...**

We all know what a difficult time this last year has been. I want to say another sincere 'thank you' to everyone involved in our work this year and to everyone who has contributed to their local communities during 2020. Let's look forward to a different 2021

*Peter Nicholls*

*Manager, Moorland Community Care Group*

## **Financial Review**

The Charity was primarily funded by the agreements with Teignbridge Community and Voluntary Services who hold contracts with Devon County Council and Torbay and South Devon NHS Foundation Trust for delivery of local community activity across the Southern area of Devon.

There was a surplus of income over expenditure of funds for the year of £30,803.49

Net Assets at the year end amounted to £125,372.21 with restricted funds of £5,709.28. The free reserves of the Charity on 31 December 2020 were £119,662.93.

## **Reserves Policy**

The Charity recognises that it is good practice to develop a reserves policy to ensure that the organisation can meet its financial liabilities and to clarify with funders the reasons why we have money which is not specifically allocated, thereby creating transparency and accountability.

It is the current policy of Moorland Community Care Group to maintain unrestricted funds of 6 months running costs and calculated redundancy costs as a general reserve. This reserve exists to:

- Ensure the Moorland Community Care Group can meet its obligations in the short term in the event of late payment of grants
- Cover any outstanding liabilities such as staff redundancy payments and remaining lease commitments on premises
- Ensure that Moorland Community Care Group core activity can continue during a period of unforeseen difficulty

## **Plans for the Future**

Moorland Community Care Group looks to coming out of Covid-19 delivery and returning to a hybrid delivery of face to face, events and sessions and digital approaches to support the wellbeing of our residents. We plan to continue with the achievements reported above in the forthcoming years subject to satisfactory funding being available. We shall continue to look to work with partners where appropriate to ensure effectiveness and efficiency.

As we grow we will seek to ensure we have the capacity to deliver and recruit where resources are available and need is identified.

## **Management**

Trustees are appointed in line with the Charity's Governing Document.

The Charity has an induction pack which is given to all Trustees covering information about the organisation, a copy of the Governing Document, guidance on Charity Responsibilities, Charity Policies and background information.

The Board of Trustees meets at least 4 times a year. Staff attend these meeting but do not have a vote.

Trustees are responsible for approving all policy and practice updates and have reviewed the liabilities and contingency plans in year. The Trustees are responsible for setting pay and remuneration and revised salary levels in the year.

**Moorland Community Care Group**  
**Trustees Report for the Year Ending 31<sup>st</sup> December 2020**

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**Risk Management**

The Board has identified major risks that the organisation is exposed to and have implemented systems to manage those risks. Reserve funds are maintained should funding cease leading to the closure of the organisation as detailed in the Reserves Policy.

The Trustees' Report was approved by the Board of Trustees

Signed:



Rev Kevin Hooke  
Chair

Dated: 29/9/21

**Independent Examiner's Report to the Trustees of Moorland Community Care Group CIO**  
**Charity number 1157919**

I report to the trustees on my examination of the accounts of Moorland Community Care Group CIO for the year ended 31<sup>st</sup> December 2020.

***Responsibilities and basis of report***

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

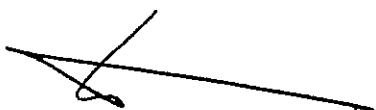
I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

***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 giving me cause to believe that in any material respect:

- (1) Accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
- (2) The accounts do not accord with those records.

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



Marianne Barrett Rogers FCA CTA FALA  
22 Union Street  
Newton Abbot TQ12 2JS

Dated: 30<sup>th</sup> September 2021

Statement of Receipts and Payments for the year to  
31st December 2020.

	Notes	Unrestricted General £	Unrestricted Designated £	Restricted £	31/12/2020 £	31/12/2019 £
<b>Receipts</b>						
Donations	1	30.00	904.50	-	934.50	2,698.30
Contracted Services	2	33,922.82	11,125.00	17,600.00	62,647.82	80,960.68
Grants	3	2,176.00	54,327.60	3,000.00	59,503.60	11,087.00
<b>Total Receipts</b>		<b>36,128.82</b>	<b>66,357.10</b>	<b>20,600.00</b>	<b>123,085.92</b>	<b>94,745.98</b>
<b>Payments</b>						
Charitable Activities	4	22,389.79	51,241.18	18,651.46	92,282.43	58,961.41
<b>Total Payments</b>		<b>22,389.79</b>	<b>51,241.18</b>	<b>18,651.46</b>	<b>92,282.43</b>	<b>58,961.41</b>
<b>Net Receipts</b>		<b>13,739.03</b>	<b>15,115.92</b>	<b>1,948.54</b>	<b>30,803.49</b>	<b>35,784.57</b>
<b>Bank Account as at 01/01/2020</b>		<b>69,515.58</b>	<b>21,145.18</b>	<b>3,760.74</b>	<b>94,421.50</b>	<b>58,636.93</b>
<b>Transfers</b>	-	<b>2,670.43</b>	<b>2,670.43</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Bank account as at 31/12/2020</b>		<b>80,584.18</b>	<b>38,931.53</b>	<b>5,709.28</b>	<b>125,224.99</b>	<b>94,421.50</b>
<b>Statement of Assets and Liabilities as at 31st December 2020</b>						
<b>Bank Account</b>		<b>80,584.18</b>	<b>38,931.53</b>	<b>5,709.28</b>	<b>125,224.99</b>	<b>94,421.50</b>
<b>Payments In advance</b>		<b>187.22</b>	<b>-</b>	<b>-</b>	<b>187.22</b>	<b>-</b>
<b>Total Assets</b>		<b>80,771.40</b>	<b>38,931.53</b>	<b>5,709.28</b>	<b>125,412.21</b>	<b>94,421.50</b>
<b>Creditors</b>		<b>40.00</b>	<b>-</b>	<b>-</b>	<b>40.00</b>	<b>-</b>
<b>Net Assets</b>		<b>80,731.40</b>	<b>38,931.53</b>	<b>5,709.28</b>	<b>125,372.21</b>	<b>94,421.50</b>

These financial statements were approved by the Board on: 28/9/21



Rev Kevin Hooke  
Chair



Ms Susan Hurrell  
Treasurer

**Notes to the accounts for the year to  
31st December 2020**

**1 Donations**

	Unrestricted	Restricted	31/12/2020
Client donations	934.50	-	934.50

**2 Contracted Services**

Teignbridge CVS	45,047.82	17,600.00	62,647.82
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**3 Grants**

Teignbridge CVS	12,400.00	3,000.00	15,400.00
Councillor Fund	756.00	-	756.00
Devon Community Foundation	4,940.00	-	4,940.00
Devon County Council	5,112.60	-	5,112.60
Groundworks	500.00	-	500.00
Rotary Club	120.00	-	120.00
National Lottery	22,880.00	-	22,880.00
Buckfastleigh Town Council	495.00	-	495.00
Ashburton Town Council	700.00	-	700.00
WPD	6,900.00	-	6,900.00
Bovey Tracey Town Council	1,500.00	-	1,500.00
Other	200.00	-	200.00
	56,503.60	3,000.00	59,503.60

**4 Payments**

IT Licenses	975.25	-	975.25
Postage	235.80	32.50	268.30
Printing	250.53	-	250.53
Telephone	1,329.25	192.04	1,521.29
Sationery	32.90	47.64	80.54
Clubs,Groups,Activity Sessions	554.22	11.01	565.23
Equipment	350.58	10.57	361.15
Bovey Action Group Funds	8,352.06	-	8,352.06
Covid 19 For Clients	610.26	14.98	625.24
Home Help Spend	60.00	-	60.00
Insurance	444.92	-	444.92
Meetings	38.25	-	38.25
PR & Marketing	185.00	-	185.00
Professional Fees	1,645.50	-	1,645.50
Recruitment	-	-	-
Salaries & Pensions	45,154.48	17,655.57	62,810.05
Sessional Workers	12,166.90	-	12,166.90
Travel Expenses	813.02	687.15	1,500.17
Volunteer Expenses including DBS Checks	432.05	-	432.05
	73,630.97	18,651.46	92,282.43

## 5 Analysis of Designated Funds for the year to 31st December 2020

Designated Funds are unrestricted funds earmarked by the Trustees for particular purposes.

	31/12/2019	Income	Expenditure	Transfers In/- Out	31/12/2020
Bovey Tracey Activities	11,664.26	1,754.50	13,779.02	360.26	-
Ashburton Activities	4,056.15	4,798.80	11,048.87	2,193.92	-
Buckfastleigh Activities	5,424.77	4,153.80	9,694.82	116.25	-
Bovey Action Group	-	11,645.00	9,553.78	-	2,091.22
Lottery Grant	-	22,880.00	4,876.17	-	18,003.83
Home Help Bursary	-	1,000.00	60.00	-	940.00
Home from Hospital	-	20,125.00	2,228.52	-	17,896.48
	<u>21,145.18</u>	<u>66,357.10</u>	<u>51,241.18</u>	<u>2,670.43</u>	<u>38,931.53</u>

## 6 Restricted Funds

Restricted Funds are subject to specific conditions by donors as to how they may be used.  
The purposes and uses of the restricted funds are set out below:

Wellbeing Co-ordination End of Life and Dementia:

To support those living with dementia or memory loss or facing end of life, their carers and families.

## 7 Unrestricted Funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

## 8 Trustees Remuneration

None of the Trustees (or any person connected with them) received any remuneration during the year. 1 Trustee received re-imbursed expenses of £185.68.

## 9 Employees

No employees received remuneration exceeding £60,000 or more.

## 10 Charitable Incorporated Organisations

The Trustees confirm, in accordance with the Charitable Incorporated Organisations (General) Regulations 2012, that at the year end the CIO did not have any outstanding guarantees to third parties nor any debts secured on assets of the CIO.