THE EVERGREEN CARE TRUST

England & Wales · Charity number 1158271

Details

Other names	Evergreen Care Stamford & District
Status	Registered
Legal form	CIO
Registered	2014-08-18
Register	View on the Charity Commission register

Contact

Address	Evergreen Care Trust Shyp House 1 Barnack Road Stamford Lincolnshire PE9 2NA
Phone	01780765900
Email	office@evergreencare.org.uk
Website	www.evergreencare.org.uk

Activities

Objects: 1 TO RELIEVE ELDERLY PEOPLE AND VULNERABLE ADULTS RESIDENT IN STAMFORD AND THE SURROUNDING AREA WHO ARE IN NEED, BY PROVIDING SERVICES AND FACILITIES CALCULATED TO RELIEVE THE NEEDS OF SUCH PERSONS.2 TO RELIEVE PEOPLE WHO ARE ELDERLY OR VULNERABLE AND RESIDENT IN STAMFORD AND THE SURROUNDING AREA, BY PROVISION OF CARERS AND THE PROVISION OF SUPPORT AND TRAINING TO SUCH CARERS.3 TO PRESERVE AND PROTECT THE GOOD HEALTH OF ELDERLY PERSONS IN NEED AND VULNERABLE ADULTS IN STAMFORD AND THE SURROUNDING AREA THROUGH PROVISION OF FINANCIAL ASSISTANCE, SUPPORT, CARE, EDUCATION AND PRACTICAL ADVICE.4 TO PROVIDE AND ASSIST IN THE PROVISION OF FACILITIES IN THE INTERESTS OF SOCIAL WELFARE FOR RECREATION OR OTHER LEISURE TIME OCCUPATION OF INDIVIDUALS WHO HAVE NEED OF SUCH FACILITIES BY REASON OF THEIR YOUTH, AGE, INFIRMITY OR DISABILITY, FINANCIAL HARDSHIP OR SOCIAL CIRCUMSTANCES WITH THE OBJECT OF IMPROVING THEIR CONDITIONS OF LIFE

Activities: Volunteer Projects: Advocacy, Befriending, Chaplaincy & Listening Sevice, Clean Team,Hospital to Home Support, Hand & Nail Care, Friendship Lunch ClubsPaid for Services: Home Support, Wellbeing Wardens(CQC regulated)Campaigns: zero tolerance unsupported discharge home from hospital of older &

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vulnerable patients without carer/family support; trusted persons bank accounts

Classification

- **How:** Makes Grants To Organisations, Provides Human Resources, Provides Services, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Religious Activities
- **Who:** Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies

Geography

- Cambridgeshire
- Lincolnshire
- Northamptonshire
- Peterborough City
- Rutland

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£369,517	£334,557	-	-
2024-03-31	£395,066	£440,673	-	-
2023-03-31	£357,296	£360,437	-	-
2022-03-31	£408,393	£364,008	-	-
2021-03-31	£438,555	£411,028	-	-

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Trustees

Name	Role	Appointed
DEREK MICHAEL RISK		2017-09-17
Deborah Ewan		2025-12-11
Joanna Rachel Peck		2022-07-28
LOUISE DEBORAH MARSH		2014-11-24
Nicholas John Adams		2018-09-05
Paul Edward Herniman		2019-12-17
Roland Marshall Higgins		2024-04-25

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THE EVERGREEN CARE TRUST

England & Wales - Charity number 1158271

Accounts

EVERGREEN CARE TRUST
(A Charitable Incorporated Organisation)

REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDING 31 MARCH 2025

Charity Registration No. 1158271

EVERGREEN CARE TRUST

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EVERGREEN CARE TRUST

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2025

The Trustees of the Charity present their report with the financial statements for the year ended 31 March 2025. The Trustees have adopted the provisions for charities of the FRS 102 Statement of Recommended Practice (SORP).

REFERENCE AND ADMINISTRATIVE DETAILS

All correspondence should be addressed to the charity's principal address:

The Evergreen Care Trust
Shyp House
1 Barnack Road
Stamford
Lincolnshire
PE9 2NA

Trustees

- Nicholas Adams — Chair
- Louise Deborah Marsh — Founder
- Paul Herniman
- Derek Michael Risk
- Jo Peck
- Roland Higgins (Appointed 28 April 2024)
- Fr Neil Shaw (Appointed 28 April 2024, Resigned 15 May 2025)

Charity Patron: Mrs Miranda Rock of Burghley

Mission, Values & Objectives

The Evergreen Care Trust is an established and trusted charity founded in 2005 to promote healthy ageing, honour old age and find meaningful ways to support older and vulnerable adults through advocacy, friendship, and practical support. The Trust was incorporated as a Charitable Incorporated Organisation on 1st December 2014 and is governed by a constitution.

New Trustees are selected and appointed by present members of the Trustee Board. The recruitment of Evergreen personnel both volunteers and employees is based on our values, sharing the same commitment and intention in supporting, training, equipping and caring for them as shown our member (service user) group.

Mission

To promote healthy ageing and positive attitudes towards older people; seeking relevant ways to honour old age and if needed, to serve through advocacy, friendship, and practical support.

Our Core Values

These remain foundational to our approach to care and relationships, ethos and activities.

Respect	We believe in the inestimable value of every human being without reservation.
Justice	We aspire to exercise the principles of truth, justice, and equity in all we do.
Service	We seek to nurture a care culture of serving throughout the organisation and into the wider community.
Training	We place great emphasis on development, equipping, and supporting all members of the Evergreen team.
Partnership	We highly esteem unity, collaboration and working together to make a difference.
Quality	We aspire to excellence without excess.
Generosity	We seek to demonstrate this, through grant giving, sharing resources, knowledge, and experience with partner colleagues.
Stewardship	We aspire to practice sound management of all funds and resources received.

Objectives

1. To ensure our vision and operations reflect the ethos and values on which the charity was founded.
2. To remain engaged with Neighbourhood Working (Health, Social Care and third sector collaborative working) Care network and consortium, and partnerships with local businesses, schools, colleges, churches, community groups and allied agencies.
3. To continue to monitor the demographic of the local community to ensure the Charity continues to provide the correct resource which matches the needs of the communities that we serve.
4. To aspire for excellence in all we do and provide.
5. To recruit and retain self-motivated and dedicated Evergreen personnel engaged in the governance, administration, and delivery of our care provision, offering excellent working and pay conditions for employees and showing appreciation to our volunteers along with support and training.

Public Benefit

The Trustees confirm that they have paid due regard to the Charity Commission guidance on public benefit in deciding on which activities the charity decides to undertake. They believe that the services the Trust has developed over 20 years, are now a vital resource for local older and vulnerable people and a strong partner with allied health and social care professionals. Most of the 'no charge' services which are mainly resourced by volunteers provide opportunities for social engagement, life enhancing activities, and support with

practical matters. The 'not for profit' paid for service covers a range of low-level interventions giving domestic support and companionship activities for which local demand is high.
The Trust is committed to equality and diversity and welcome engagement with people from different communities and minorities without reserve, whether as service users or as Evergreen personnel.

Services to the Local Community

Evergreen provides a wide range of services to support older people in Stamford, Bourne and The Deepings with currently 8 free of charge activities as well as the paid for service providing housekeeping, nutrition and hydration assistance and companionship support in member's homes to help maintain their independence for as long as possible. The free of charge services are largely resourced and lead by volunteer staff but are managed by three part-time paid staff. The paid for service is wholly resourced by paid staff.

The volunteer resourced services are:

- **Befriending**

This is our longest running volunteer service and has high demand and aims to match trained volunteer befrienders with befriendees. This service provides regular companionship in the home on a weekly basis, by mutual agreement, dependent on the needs of the befriendee. Activities may include things like a cuppa and conversation, accompaniment for shopping trips, medical appointments or just sharing hobbies and shared interests. This project is aimed at reducing loneliness and social isolation. As well as 'face to face' Befriending we also provide telephone Befriending which was established during Covid lockdown. During the year this provided an estimated 4500 hours of companionship time to 45 + members. We are gradually growing this service, but it is also dependent on finding additional volunteers and at the year-end there were still some 26 members in the local community on the waiting list.

- **Social Engagement**

These are group activities to build friendships and reduce isolation amongst older people in the community and mainly centres around the Friends Together Group which meets for two hours on Mondays and Thursday at the Stamford Free Church and provides activities and refreshments for those who attend. The activities include music & singing, chair exercises, table games, bingo & craftwork. There are up to 25 regular attendees each week from the local area including from Care Homes. In 2024 this has been mainly funded from Evergreen reserves and donations from attendees.

This is the second year of the partnership with the Birch Tree Café to hold a monthly Friendship Lunch. This is an inter-generational event where attendees enjoy lunch, cards or games and a chat. It also gives an opportunity for the young adults at the Birch Tree Café with Down's Syndrome to prepare the food, set up the table and serve. They are also able to talk with customers which builds their confidence and interpersonal skills. Evergreen volunteers often provide lifts and support to enable socially isolated older people to attend this group.

- **Advocacy**

This service can help with sometimes confusing modern day processes including accessing information, completing forms for benefits and blue badges, dealing with utilities and banks, as well as advice on scams. The team of 10 volunteers have helped some 100 members over the past year.

- **Chaplaincy and Listening**

This service is for those with faith, no faith or for signposting to other faiths. It provides a friendly 'non-judgemental listening ear' for difficult times in older people's lives. Evergreen has a small team of trained and experienced volunteers to provide this service overseen by a Volunteer Spiritual Director (ordained Minister) who provide 'face to face' visits and telephone listening. During the year some 150 hours of support was provided.

- **Community Support**

This is an on-request service mainly to provide transport to and from medical appointments for older/less mobile members of the community. The service also deals with requests for assistance with other one-off tasks around the home but does rely on being able to match with an Evergreen volunteer able to provide the service.
Usually between 3 to 5 requests for help are received every week.

- **Hand & Nail Care**

This previously very popular service was re-started in 2023 and is focussed on residents of local care homes and resourced by a small group of Evergreen volunteers. It is a great way to boost wellbeing with dedicated time, 1 to 1 conversation, as well as a hand massage, manicure and nail polish. The service is currently provided every other Wednesday afternoon 2:00pm – 4:00pm at Whitefriars Care Home in Stamford. This could be expanded more widely as additional trained volunteers become available. Over the past 12 months our volunteers have made 25 visits to the care home and provided over 200 treatments to residents.

- **Second Helpings Evergreen Lunch Support (SHELS)**

This no charge service previously known as the Soup Service was restarted again in 2023, after an absence of several years, and provides for the delivery of hot meals to the homes of members in Stamford and Ryhall. This service is now a collaboration with Second Helpings who prepare the food to be delivered by Evergreen volunteers, with the food costs shared between the two charities. This service has steadily grown, it currently only operates on one day per week with the number of meals delivered between 30-33. The service is aimed at those in greatest need, who would most benefit from a nutritious meal and seeing a regular friendly face. This includes people who are housebound, socially isolated, vulnerable, in the downward spiral of self-neglect, are bereaved, or recuperating from surgery or illness. The service is currently at capacity and there is a waiting list of referrals. The aim is to expand the service to 50 meals delivered weekly in September 2025.

- **De-cluttering Service and Clean Team**

This is a service available in emergencies to support older members of the community to restore their home environment to a safe condition when there has been hoarding and a lack of routine domestic cleaning. It is not meant to replace the obligations of the statutory authorities who are always kept informed. Use of this service is usually conditional on the individual arranging ongoing support with Home Support cleaning paid for by themselves.

The Home Support not for profit service

This paid for service, which has been running since the start of the charity, provides a range of supports tailored to individual requirements, including companionship, support with meal preparation, help with cleaning, domestic chores like laundry and ironing, and help with

shopping. It also offers regular or by arrangement 'pop in visits' ensuring all is well, especially when loved ones are away on holiday. Support can also include escorting to appointments, trips out, special events, or leisure activities.
In the last year the Home Support service has had over 90 regular users receiving over 9,000 hours of support.

Assisted Living Provision

Evergreen's Assisted Living Provision continues to be of value to the local community in that Evergreen will supply and fit only Police approved Supra 500 Key safes, supply and manage Medication safes, and arrange installation of the new digitalised version of the former Evergreen Lifeline 24 Telecare service, now Care Line 365.

Benefits Generated by our Services

In total, over the year and across all the services, the charity used over 100 volunteers and 23 paid staff to deliver over 20,000 hours of support to more than 300 members, their families, and carers in the local communities in Stamford, Deeping and Bourne. The majority of these received support through our volunteer resourced no charge services.

Success continues to be measured through feedback from service users, family, and carers as well as volunteers and staff through regular reviews, evaluation forms and notifications, letters and cards. Evergreen has an established reputation locally as a charity which responds to local need with compassion and commitment and for working collaboratively with statutory and other sector organisations for the benefit of local people. The Trust remains an active contributor to Neighbourhood Working representing the Third sector.

Safeguarding and Best Practice

All staff have a current DBS certificate and receive appropriate training for their roles whether volunteers or paid for service staff. Front line staff delivering paid for care are provided with PPE and are required to complete a portfolio of mandatory training using Care Skills Academy online training courses and there are also monthly group training sessions dealing with topical issues and best practice. Front-line care staff also have access to experienced Supervisors to deal with any urgent problems that may arise, the Supervisors also monitor the work of the carers with occasional visits to member's homes. All new members receive an assessment of their care needs, a risk review and a care plan agreed before the service commences.

Evergreen remains committed to the support and valuing of its personnel. This includes pastoral care, wellbeing advice, professional development, regular supervision and support, and adherence to best Health & Safety practice in the office and in the field.

Fundraising

Raising the funds to cover the increasing costs of delivering the volunteer services and the subsidy for the paid for services is a constant challenge. Currently most of our donations come from the regular supporters be they individuals who are Friends of Evergreen and donate generously every month or the individuals, churches, local Trusts and other local organisations that donate generously every year. Evergreen also participates in local festivals and events to raise the awareness of the charity. There are also individuals and local groups that from time to time organise events that raise funds for the Trust. This year the Trust has also been the beneficiary of two legacies.

Towards the end of the year, it was decided not to hold the annual Christmas Cracker fundraising event in favour of organising an Anniversary Ball to be held in April 2025 to celebrate the 20th Anniversary of the founding of the Trust. This would also be a major fundraising event with an auction of prizes very generously donated by local businesses.
In the coming year a new Marketing and Fundraising post is being established, with support of a grant, to develop and implement a strategy to further raise the profile of Evergreen including regular fundraising events and using local media, the website and social media to broaden the base of supporters.
As opportunities arise the Trust also seeks grants for specific purposes and in the past year grants have been received to renew the Trust's IT equipment and to fund the new post to develop a marketing and fundraising role.

Partnership Activity

The Trustees also recognise the synergy of collaborating with partners to maximise the benefits of the services provided for the Stamford, Bourne and Deepings communities. The Trust already partners with a number of local community organisations including, Stamford Endowed Schools who arrange an annual tea party for Evergreen members supported by Evergreen volunteers and also donate funds raised by their students, Second Helpings who prepare the meals for the recently reintroduced lunch delivery service and Birch Tree Café for the monthly Friendship lunches.

Evergreen is also proud to have long standing and existing partnerships with other community groups and local businesses that from time to time generously provide funding or resources for specific projects.

Evergreen works in partnership with the statutory authorities. Each month Leadership staff attend the Stamford Neighbourhood MDT (Multi-Disciplinary Team) meeting. The Neighbourhood Team is a collection of a range of professionals across primary care, secondary care and voluntary sectors. These can include the GP and primary care network (PCN) teams, community nurses, mental health teams, adult social care and voluntary sectors. The MDT meeting ensures a collective approach to supporting older people with complex needs.
Evergreen also works closely with South Kesteven District Council Housing Department to provide support to older residents where SKDC have identified a need.
Evergreen also responds to referrals from other sources including Social Prescribers.

Evergreen is keen to extend its partnerships with the local churches, other local charities and business organisations including other local care providers. This would be done in a transparent way with agreed Memorandum of Understandings defining the responsibilities of each party.

Research

As a Trust we were pleased to announce that we joined the Research, Learning & Excellence Community (RELEC) of Home Care providers funded by the NIHR Research Delivery Network East Midlands and the University of Lincoln School of Health & Social Care in July 2021. Further to this we were the first Home Care Provider to sign up to the join Dementia Research campaign. We pushed for this change as historically it was only for Care Homes and individuals to sign up. We have actively engaged with various Universities to take part in integral research that also helps us to improve the ways we work and serve our local community.

Evergreen continues to maintain this membership of the RELEC network for Home Care providers now in its fourth year. The team have undertaken surveys and working parties and acted in an advisory capacity for the Research Community engaging and developing relevant Social Care Research. There are a number of Home Care studies in the pipeline that Evergreen hopes to participate in. Evergreen considers evidence-based practice vital in maintaining standards and demonstrating innovative, creative person-centred best practice Evergreen has delivered training developed from current research evidence on nutrition and hydration for those living with dementia in their own homes (Bournemouth University TOMATO study) and is also involved with the DemCham study at Kings College London, the role of front-line Home Care workers in championing good dementia care in the home. Evergreen has also embraced the Cardiff University research findings on Supporting members of the LGBTQ+ community in social care and are awaiting sign up for the LEAP study on LGBTQ+ inclusive provision in Home Care in the Autumn.

It is important to us that we lead the way in active participation in research for Dementia and social care research in general, nurturing a culture of research, learning and excellence within our organisation. We promote the JDR Join Dementia Research opportunity with our personnel and member group and their families.

Our Founding Trustee Louise Marsh continues her Health & Social Care Research team role at the University of Lincoln and RDN East Midlands furthering efforts to establish evidence based best practice moving away from time and task service delivery to self-managing teams focusing on whole person-centred care delivery and team practice.

Financial Review

The Evergreen Care Trust is a faith-based organisation and the funding of the ongoing free of charge services provided by the Evergreen Care Trust is primarily from public donations, although during the year money was also raised from fund raising events. These funds along with the contribution from the paid for services help to cover the administrative costs of the Trust, including general running costs and salaries of administrative staff.

All Evergreen income and reserves are used to provide services and support that benefit older and vulnerable members in the district it serves; Stamford, Bourne, the Deepings and surrounding villages. Evergreen utilises the principle of tithing up to 10% of its income to support its subsidised paid for services, provide support to individual members experiencing financial hardship and to fund the development of new or improved care services for older and/or vulnerable people. These designated funds are shown in the financial statements as The Clive Dixon Hardship and Development Fund.

In 2024/25 the Trust had an income of £369,517 (£395,066 in 23/24) including donations and grants of £137,655. Expenditure in the year was £334,557 (£440,673 in 23/24) giving rise to a surplus of £34,960 (£45,607 deficit in 23/24). The year-on-year reduction in income was mainly due to the cessation of the Wellbeing regulated service in January 2024 partly offset by a welcome increase in grants, donations and legacies. The reduction in service delivery costs was also mainly due to the cessation of the Wellbeing service plus efficiency savings in the administration and management costs partly offset by improved pay rates for staff. The detailed results for the year and financial position of the charity are shown in the financial statements.

At the 31 March 2025 the charity had total reserves of £113,734 of which £12,000 was` restricted. These reserves were equivalent to over 3 months of the planned expenditure over the coming year. The Trustees regularly monitored the level of reserves and aim to retain 3 month's expenditure as a reasonable balance between the need to resource current services and the need for longer term sustainability.

During the year the Trustees reviewed the restricted funds both for staff training and the hardship funds for service users of limited means both of which had small balances and limited disbursements. As detailed in the notes to the accounts two training funds were merged into one designated fund with the same purpose and the hardship and a small development fund were merged into one designated fund for hardship and service development.

Future Developments

Recognising that the changing economic and social environment provides particular challenges to the older and vulnerable members of the community the ongoing aim of the Trust is to ensure the services continue to help support their needs and to identify additional needs that may require changes to existing services or new services.

Towards the end of the year the Trust, with some grant support, invested in new IT equipment that will be introduced in the early part of the new year to upgrade and improve the efficiency of the IT network and computing functions. As well as increasing the efficiency of the administrative and support functions this would also enable the introduction of new systems to record and manage the member services more effectively.

The Trust also recognises the importance of service usage data for marketing and fundraising initiatives and is collaborating with Stamford College using student work experience to assist with building a new database.

The Trust continues to be conscious of the growth of independent Personal Assistants providing care services. In the absence of regulation the Trust recognises the need to provide advice and signpost older people, and their families, with seeking care services from reliable, trained and empathic independent providers of care services.

Acknowledgement

The Evergreen Care Trust acknowledges the enormous public support and generosity of individuals, churches, community groups and local businesses. Without this support and that of our amazing volunteers and employees, so much of what Evergreen does in providing meaningful support and care for local people would not be achieved. To all our supporters we say thank you.

Signed on behalf of Trustees.

Louise Deborah Marsh
Founder & Trustee
September 2025

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF EVERGREEN CARE TRUST

I report on the accounts for the year ended 31 March 2025 set out on pages 11 to 18.

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 required.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, 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); and
- to state whether particular matters have come to my attention.

Basis of the independent examiner's report
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 statements below.

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 386 and 387 of the Companies Act 2006; and
- to prepare accounts which accord with the accounting records, comply with the accounting requirements of Sections 394 and 395 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities 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.

Jan Simmonds ACMA CGMA (retired)

September 2025

STATEMENT OF FINANCIAL ACTIVITIES
FOR YEAR ENDED 31 MARCH 2025

	Note	Unrestricted Funds £	Restricted Funds £	Total 2025 £	Total 2024 £
Income and Endowments from:					
Donations & Legacies	2	125,655	12,000	137,655	79,874
Charitable activities	3	227,562	-	227,562	308,782
Trading activities	4	3,460	-	3,460	5,652
Investments	5	840	-	840	758
Total incoming resources		357,517	12,000	369,517	395,066
Expenditure on:					
Raising funds	6	595	-	595	415
Charitable activities	7	331,337	2,625	333,962	440,258
Total resources expended		331,932	2,625	334,557	440,673
Net income/ (expenditure)		25,585	9,375	34,960	(45,607)
Fund balances brought forward		66,458	12,316	78,774	124,381
Transfers between funds	13	9,691	(9,691)	-	-
Fund balances carried forward		101,734	12,000	113,734	78,774

There are no recognised gains and losses other than those passing through the statement of financial activities.

All activities derive from continuing operations. There were no activities resulting from Endowment Funds.

EVERGREEN CARE TRUST

BALANCE SHEET
AT 31 MARCH 2025

	Notes	Un-Restricted funds £	Restricted funds £	2025 Total funds £	2024 Total funds £
Fixed assets					
Tangible Assets	10	348	-	348	474
Current assets					
Debtors	11	51,487	-	51,487	21,654
Cash at bank and in hand		80,783	12,000	92,783	82,678
Total current assets		132,270	12,000	144,270	104,332
Creditors: amounts falling due within one year	12	30,884	-	30,884	26,032
Net current assets		101,386	12,000	113,386	78,300
Total assets less current liabilities		101,734	12,000	113,734	78,774
Net assets		101,734	12,000	113,734	78,774
FUNDS	13				
Restricted funds				12,000	12,316
Unrestricted funds:					
Designated funds				18,302	5,000
Other charitable funds				68,741	61,458
TOTAL FUNDS				99,043	78,774

The financial statements were approved by the Trustees on 12 September 2025 and signed on their behalf by:

Derek Risk
Trustee

CASH FLOW STATEMENT
FOR YEAR ENDED 31 MARCH 2025

	2025 £	2024 £
Operating surplus/(deficit)	34,120	(46,365)
Reconciliation to cash generated from operating activities		
Depreciation of tangible assets	126	126
Decrease / (Increase) in debtors	(29,833)	4,855
Increase / (Decrease) in creditors	4,852	(8,025)
Cash generated from operating activities	9,265	(49,409)
Cash generated from financing activities		
Interest received	840	758
Cashflow from Investing activities		
Payments to acquire tangible assets	-	-
Net increase / (decrease) in cash	10,105	(48,651)
Cash at bank and in hand at beginning of year	82,678	131,329
Cash at bank and in hand at end of year	92,783	82,678
Consisting of:		
Cash at bank and in hand	92,783	82,678
	92,783	82,678

NOTES TO THE ACCOUNTS
FOR YEAR ENDED 31 MARCH 2025

1 ACCOUNTING POLICIES

Accounting convention
These accounts have been prepared under the historic cost convention and the Trustees have adopted the provisions for charities of the FRS102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

Incoming resources
All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy. Amounts not received are included in Debtors. Tax reclaims are included when cash is received from HMRC.

Resources expended
Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets
Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

All equipment, fixtures & fittings	20% on cost

Taxation
The charity is exempt from corporation tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the Trustees.

Designated funds are unrestricted funds which are earmarked for specific purposes by the Trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. The purpose of each restricted fund is included in the notes to the financial statements

Independent examination fee
The cost of the Independent examination included in these accounts is nil.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2025 (continued)

2 Grants, Donations & Legacies

		Total 2025 £	Total 2024 £
Un-restricted			
	Grants	-	4,182
	Donations	78,060	64,553
	Legacies	40,116	-
	Gift Aid Refunded	7,479	11,139
	Total	125,655	79,874
Restricted			
	Marketing Post	12,000	-
		12,000	-

3 Income from Charitable Activities

		Total 2025 £	Total 2024 £
Un-restricted			
	Home Support	227,201	189,178
	Wellbeing	-	116,614
	Other	361	2,990
	Total	227,562	308,782
Restricted			
	None	-	-
		-	-

4 Income from Fund Raising

	Total 2025 £	Total 2024 £
Un-restricted	3,460	5,652

5 Investment income

	Total 2025 £	Total 2024 £
Bank interest received	840	758

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2025 (continued)

6 Expenditure on Fund Raising

	Total 2025 £	Total 2024 £
Un-restricted		
Publicity	-	90
Other Fundraising	595	325
	595	415

7 Expenditure on Charitable Activities

	Total 2025 £	Total 2024 £
Un-restricted activities		
Home Support	184,260	183,048
Wellbeing	-	62,130
Volunteer Services	42,656	36,854
Administration Wages	47,514	56,518
Other support costs	56,907	91,637
Total	331,337	430,187
Restricted		
Infection Control	-	3,693
Friends Together	2,625	6,378
Total	2,625	10,071

8 Trustees and Key Management Personnel remuneration and expenses

No Trustee received remuneration or claimed expenses for their work as a Trustee (2024: £Nil). There was one key management employee during the year who received remuneration, pension contribution and other benefits in the range of £25,000 to £30,000.

(2024: Two key management employees in the range £25,000 to £30,000)

9 Staff Costs and Numbers

	2025 £	2024 £
Wages and salaries	236,274	346,408
Social security costs	6,763	14,033
Pension costs	3,568	5,499
Total Staff Costs	246,605	365,940

The average monthly number of employees during the year was as follows:

2025	2024
23	26

No employee received emoluments in excess of £60,000 per annum.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2025 (continued)

10 Tangible Fixed Assets

Cost	Computer Equipment £	Office Equipment £	Angels Equipment £	Total £
At 1 April 2024	2,520	632	2,328	5,480
Additions	-	-	-	-
Disposals	-	-	-	-
At 31 March 2025	2,520	632	2,328	5,480
Depreciation				
At 1 April 2024	2,520	158	2,328	5,006
Charge for the year	-	126	-	126
Disposals and adjustments	-	-	-	-
At 31 March 2025	2,520	284	2,328	5,132
Net Book Value				
At 31 March 2025	-	348	-	348
At 31 March 2024	-	474	-	474

11 Debtors

	2025 £	2024 £
Trade Debtors	18,460	21,654
Legacies	32,977	-
Other debtors	50	-
	51,487	21,654

12 Creditors: amounts falling due within one year

	2025 £	2024 £
Accruals	495	1,079
Other creditors	30,389	24,953
	30,884	26,032

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2025 (continued)

13 Movement in Funds

	Opening Balance at 1.4.24	Incoming resources	Resources expended	Transfers between funds	Closing Balance at 31.3.25
	£	£	£	£	£
Unrestricted funds					
General fund	66,458	349,769	(328,896)	(3,899)	83,432
Designated Funds:-					-
IT Equipment	-	7,548	-	3,000	10,548
Clive Dixon Hardship and Development	-	200	-	4,929	5,129
Training	-	-	(3,036)	5,661	2,625
Total Unrestricted Funds	66,458	357,517	(331,932)	9,691	101,734
Restricted funds					
Marketing Post	-	12,000	-	-	12,000
Clive Dixon Respite	3,951	-	-	(3,951)	-
Infection Control	3,611	-	-	(3,611)	-
Friends Together	2,625	-	(2,625)	-	-
Chaplaincy Training	2,050	-	-	(2,050)	-
UK Developments	79	-	-	(79)	-
TOTAL Restricted Funds	12,316	12,000	(2,625)	(9,691)	12,000
TOTAL FUNDS	**78,774**	**369,517**	**(334,557)**	**-**	**113,734**

The Trustees undertook a review of the Restricted funds of the charity at the Board meeting on 20 June 24. It was agreed that, with effect from 1st April 2024, the following changes were to be implemented:-

1) A new Designated Fund to be created, called the Clive Dixon Hardship and Development Fund.. The opening fund balances to be created from two previous Restricted Funds, the Clive Dixon Respite Fund (£3,951) and the UK Developments Fund (£79) and a General hardship fund (£2,000)

2) A new Designated Training Fund to be created, and the previously Restricted Chaplaincy Training (£2,050)and Infection Control Funds (£3,611) to be transferred into the Training Fund.

3) A new Designated IT Equipment Fund to be created from the General IT Fund (£3,000)

14 Purposes of Restricted Funds

The Charity has only one restricted fund remaining at 31st March 2025, the Marketing post Fund, created during the year.

Marketing Post Fund (new in year)
The Charity received a donation during the year, to fund the costs of a salaried marketing role for the charity , for the first of a 2 year project. This post was recruited to in June 2025.

Clive Dixon Respite Fund (reclassified in year)
Provides treats, trips out and respite for those for whom these benefits would be financially prohibitive

Infection Control Grant (reclassified in year)
Grant to support ongoing infection control training costs

Friends Together (utilised in year)
Grant to support twice weekly sessions to improve members mental wellbeing

Chaplaincy Training (reclassified in year)
Grant to support expenses on chaplaincy training course

UK Developments (reclassified in year)
Initiative to promote the Evergreen Model in other communities

THE EVERGREEN CARE TRUST

England & Wales - Charity number 1158271

Accounts

EVERGREEN CARE TRUST
(A Charitable Incorporated Organisation)

REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDING 31 MARCH 2024

Charity Registration No. 1158271

EVERGREEN CARE TRUST

CONTENTS OF THE FINANCIAL STATEMENTS FOR THE YEAR ENDING 31 MARCH 2024

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EVERGREEN CARE TRUST

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2024

The Trustees of the Charity present their report with the financial statements for the year ended 31 March 2024. The Trustees have adopted the provisions for charities of the FRS 102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

REFERENCE AND ADMINISTRATIVE DETAILS

All correspondence should be addressed to the charity's principal address:

The Evergreen Care Trust
Shyp House
1 Barnack Road
Stamford
Lincolnshire
PE9 2NA

TRUSTEES

- Nicholas Adams Chair
- Catherine Sarah Fitt (Until 28 February 2024)
- Louise Deborah Marsh Founder
- Paul Herniman
- Derek Michael Risk
- Jo Peck
- Fr Neil Shaw (Appointed 28 April 2024)
- Roland Higgins (Appointed 28 April 2024)
-

Charity Patron: Mrs Miranda Rock of Burghley

Mission, Values & Objectives

The Evergreen Care Trust is an established and trusted charity founded in 2005 to promote healthy ageing, honour old age and find meaningful ways to support older and vulnerable adults through advocacy, friendship, and practical support. The Trust was incorporated as a Charitable Incorporated Organisation on 1st December 2014 and is governed by a constitution.

New Trustees are selected and appointed by present members of the Trustee Board. The recruitment of Evergreen personnel both volunteers and employees is based on our values, sharing the same commitment and intention in supporting, training, equipping and caring for them as shown our member (service user) group.

Mission: To promote healthy ageing and positive attitudes towards older people; seeking relevant ways to honour old age and if needed, to serve through advocacy, friendship, and practical support.

Our Core Values

These remain foundational to our approach to care and relationships, ethos and activities.

Respect	We believe in the inestimable value of every human being without reservation.
Justice	We aspire to exercise the principles of truth, justice, and equity in all we do.
Service	We seek to nurture a care culture of serving throughout the organisation and into the wider community.
Training	We place great emphasis on development, equipping, and supporting all members of the Evergreen team.
Partnership	We highly esteem unity, collaboration and working together to make a difference.
Quality	We aspire to excellence without excess.
Generosity	We seek to demonstrate this, through grant giving, sharing resources, knowledge, and experience with partner colleagues.
Stewardship	We aspire to practice sound management of all funds and resources received.

Objectives

1. To ensure our vision and operations reflect the ethos and values on which the charity was founded.
2. To remain engaged with Neighbourhood Working (Health, Social Care and third sector collaborative working) Care network and consortium, and partnerships with local businesses, schools, colleges, churches, community groups and allied agencies.
3. To continue to monitor the demographic of the local community to ensure the Charity continues to provide the correct resource which matches the needs of the communities that we serve.
4. To aspire for excellence in all we do and provide.
5. To recruit and retain self-motivated and dedicated Evergreen personnel engaged in the governance, administration, and delivery of our care provision, offering excellent working and pay conditions for employees and showing appreciation to our volunteers along with support and training.

Public Benefit

The Trustees confirm that they have paid due regard to the Charity Commission guidance on public benefit in deciding on which activities the charity decides to undertake. They believe that the services the Trust has developed over 19 years, are now a vital resource for local

older and vulnerable people and a strong partner with allied health and social care professionals. Most of the 'no charge' services are volunteer led and provide opportunities for social engagement, life enhancing activities, and support with practical matters. The 'not for profit' paid for services cover a range of low-level interventions giving domestic support and companionship activities for which local demand is high.
The Trust is committed to equality and diversity and welcome engagement with people from different communities and minorities without reserve, whether as service users or as Evergreen personnel.

Services to the Local Community

Evergreen provides a wide range of services to support the elderly in Stamford, Bourne and The Deepings with currently 8 free of charge activities as well as the paid for service providing housekeeping, nutrition and hydration and companionship support in member's homes to help maintain their independence for as long as possible. The free of charge services are largely resourced and lead by volunteer staff but are managed by two part-time paid staff. The paid for service is wholly resourced by paid staff.

The volunteer resourced services are:

- **Befriending**

This is our longest running volunteer service and has high demand and aims to match trained volunteer befrienders with befriendees. This service provides regular companionship in the home on a weekly basis, by mutual agreement, dependent on the needs of the befriendee. Activities may include things like a cuppa and conversation, accompaniment for shopping trips, medical appointments or just sharing hobbies and shared interests. This project is aimed at reducing loneliness and social isolation. During the year this provided an estimated 5,000 hours of companionship time to 50+ members. With some help from grants, we are gradually growing this service, but it is also dependent on finding additional volunteers and at the year-end there were still some 51 members in the local community on the waiting list.

- **Social Engagement**

These are group activities to build friendships and reduce isolation amongst older people in the community and mainly centres around the Friends Together Group which meets for two hours on Mondays and Thursday at the Stamford Free Church and provides activities and refreshments for those who attend. The activities include music & singing, chair exercises, table games, bingo & craftwork. There are up to 25 regular attendees from the local area including from Care Homes. In 2023 this has been supported by funding from the Alan Boswell Group Charitable Trust but for 2024 will be mainly funded from Evergreen reserves.

Evergreen also works in partnership with the Birch Tree Café to hold a monthly Friendship Lunch. This is an inter-generational event where attendees enjoy lunch, cards or games and a chat. It also gives an opportunity for the young adults at the Birch Tree Café with Down's Syndrome to prepare the food, set up the table and serve. They are also able to talk with customers which builds their confidence and interpersonal skills. Evergreen volunteers often provide lifts and support to enable socially isolated older people to attend this group.

There has also been a monthly Friendship Tea at the Stamford Free Church for people living with dementia. These events have offered friendship and respite for carers and their loved ones living with dementia. In 2024 we hope to develop a more comprehensive offering of regular events in collaboration with a local care provider.

- **Advocacy**

This service can help with sometimes confusing modern day processes including accessing information, completing forms for benefits and blue badges, dealing with utilities and banks, as well as advice on scams. The team of 12 volunteers have helped some 120 members over the past year.

- **Chaplaincy and Listening**

This service is for those with faith, no faith or for signposting to other faiths. It provides a friendly 'non-judgemental listening ear' for difficult times in older people's lives.
Evergreen has a small team of trained and experienced volunteers to provide this service.
During the year some 200 hours of support was provided.

- **Community Support**

This is an on-request service mainly to provide transport to and from medical appointments for older/less mobile members of the community. The service also deals with requests for assistance with other one-off tasks around the home but does rely on being able to match with an Evergreen volunteer able to provide the service.
Usually between 3 to 5 requests for help are received every week.

- **Hand & Nail Care**

This previously very popular service was re-started in 2023 currently focussed on residents of local care homes and resourced by a small group of Evergreen volunteers. It is a great way to boost wellbeing with dedicated time, 1 to 1 conversation, as well as a hand massage and nail polish. This could be expanded more widely as additional trained volunteers become available. Over the past 12 months our volunteers have made 50 visits to two care homes and provided over 300 treatments to residents.

- **Second Helpings Evergreen Lunch Support (SHELS)**

This no charge service previously known as the Soup Service was restarted again in 2023, after an absence of several years, and provides for the delivery of hot meals to the homes of members in Stamford and Ryhall. This service is now a collaboration with Second Helpings who prepare the food to be delivered by Evergreen volunteers, with the food costs shared between the two charities. This service has started at a low level and currently only operates on one day per week with the number of meals delivered at 23 but gradually increasing as new referrals are received. The service is aimed at those in greatest need for example people who are housebound, socially isolated, vulnerable, in the downward spiral of self-neglect, are bereaved, or recuperating from surgery or illness. Those who would most benefit from a nutritious meal and seeing a regular friendly face.

- **De-cluttering Service and Clean Team**

This is a service available in emergencies to support older members of the community to restore their home environment to a safe condition when there has been hoarding and a lack of routine domestic cleaning. It is not meant to replace the obligations of the statutory authorities who are always kept informed. Use of this service is usually conditional on the individual arranging ongoing support with Home Support cleaning paid for by themselves.

The not-for-profit paid for services are:

- **Home Support**

This paid for service, which has been running since the start of the charity, provides a range of supports tailored to individual requirements, including companionship, support with meal preparation, help with cleaning, domestic chores like laundry and ironing, and help with shopping. It also offers regular or by arrangement 'pop in visits' ensuring all is well, especially when loved ones are away on holiday. Support can also include escorting to appointments, trips out, special events, or leisure activities.

- **Wellbeing Warden**

In addition to the Home Support service the Wellbeing carers can assist with medications and ensuring adequate nutrition and hydration. This team has had additional training in speciality areas like medication management, dementia, frailty and common ailments in older age.

De Regulation of Wellbeing Warden Service

The Board made the decision to de regulate with the Care Quality Commission as we were unable to recruit sufficient care staff willing to provide personal care and work the 7 day roster between 8am and 6pm. This meant that our aspirations to provide a safe and quality service were compromised. This decision was made in November 2023 in discussion with the Wellbeing team. The staff worked hard to ensure that existing members who needed to transfer to alternative provision, were well supported during this process. Evergreen negotiated with two Personal Care providers and a small team of Personal Assistants to ensure continuity of care. Families and members were assisted with moving to these agencies and providers successfully. In January 2024 Evergreen ceased to be regulated and the small number of members requiring ongoing personal care, safely embedded with new providers.

In the last year the Home Support and Wellbeing services have had over 100 users receiving over 12,000 hours of support.

Assisted Living Provision

Evergreen's Assisted Living Provision continues to be of value to the local community in that Evergreen will supply and fit only Police approved Supra 500 Key safes, supply and manage Medication safes, and arrange installation of the Evergreen Lifeline 24 Telecare service.

Benefits Generated by our Services

In total, over the year and across all the services, the charity used 100 volunteers and 26 paid staff to deliver over 20,000 hours of support to 300 people, their families, and carers in the local communities in Stamford, Deeping and Bourne. The majority of these received support through our volunteer resourced no charge services.

Success continues to be measured through feedback from service users, family, and carers as well as volunteers and staff through regular reviews, evaluation forms and notifications,

letters and cards. Evergreen has an established reputation locally as a charity which responds to local need with compassion and commitment and for working collaboratively with statutory and other sector organisations for the benefit of local people. The Trust remains an active contributor to Neighbourhood Working representing the Third sector.

There is also a members committee, including representatives of both the paid for and volunteer services, which meets regularly to provide feedback on the ongoing services and also for consultation on any planned changes.

Evergreen has previously won local business awards and in 2023 was runner up for Best Social Enterprise in the Stamford Mercury awards.

Safeguarding and Best Practice

All staff have a current DBS certificate and receive appropriate training for their roles whether volunteers or paid for service staff. Front line staff delivering paid for care are provided with PPE and are required to complete a portfolio of Mandatory training with Care Skills Academy online training courses and there are also monthly group training sessions dealing with topical issues and best practice. Front-line care staff also have access to experienced Supervisors to deal with any urgent problems that may arise, the Supervisors also monitor the work of the carers with occasional visits to member's homes. All new members receive an assessment of their care needs, a risk review and a care plan agreed before the service commences.

Evergreen remains committed to the support and valuing of its personnel. This includes pastoral care, wellbeing advice, professional development, regular supervision and support, and adherence to best Health & Safety practice in the office and in the field.

Fundraising

Raising the funds to cover the increasing costs of delivering the volunteer services and the subsidy for the paid for services is a constant challenge. Currently most of our donations come from the regular supporters be they individuals who are Friends of Evergreen and donate generously every month or the individuals, churches, local Trusts and other local organisation that donate generously every year. In the coming year the aim is to give greater recognition to our regular supporters with some special events and also using the website and social media to broaden the base of supporters. There are also individuals and local groups that from time to time organise events that raise funds for the Trust.

Evergreen also has the very popular annual Christmas Cracker event which has draws for prizes for each day during advent. The excellent prizes are very generously donated by local businesses. Evergreen also participates in local festivals and events further raising awareness of the charity.

As opportunities arise the Trust also bids for grants to extend or improve the services provided and in the past year grants have been received to support the twice weekly Friends Together events and to extend the Befriending service in Bourne.

Partnership Activity

The Trustees also recognise the synergy of collaborating with partners to maximise the benefits of the services provided for the Stamford, Bourne and Deepings communities. The

Trust already partners with Stamford Endowed Schools who arrange an annual tea party for Evergreen members supported by Evergreen volunteers and also donate funds raised by their students. Other partners are Second Helpings who prepare the meals for the recently reintroduced lunch delivery service and Birch Tree Café for the monthly Friendship lunches. Evergreen is keen to extend its partnerships with the local churches, other local charities and business organisations including other local care providers. This would be done in a transparent way with agreed Memorandum of Understandings defining the responsibilities of each party.

Research

As a Trust we were pleased to announce that we joined the Research, Learning & Excellence Community (RELEC) of Home Care providers funded by the NIHR Clinical Research Network East Midlands and the University of Lincoln School of Health & Social Care in July 2021. Further to this we were the first Home Care Provider to sign up to the join Dementia Research campaign. We pushed for this change as historically it was only for Care Homes and individuals to sign up. We have actively engaged with various Universities to take part in integral research that also helps us to improve the ways we work and serve our local community.

Evergreen continues to maintain this membership of the RELEC network for Home Care providers. The team have undertaken surveys and working parties and acted in an advisory capacity for the Research Community engaging and developing relevant Social Care Research. There are a number of Home Care studies in the pipeline that Evergreen hopes to participate in. Evergreen considers evidence-based practice vital in maintaining standards and demonstrating innovative, creative person-centred best practice

It is important to us that we lead the way in active participation in research for Dementia and social care research in general, nurturing a culture of research, learning and excellence within our organisation.

Our Founding Trustee Louise Marsh continues her Health & Social Care Research team role at the University of Lincoln and is furthering efforts to establish evidence based best practice moving away from time and task service delivery to self-managing teams focusing on whole person-centred care delivery and team practice.

Financial Review

The Evergreen Care Trust is a faith-based organisation and the funding of the ongoing free of charge services provided by the Evergreen Care Trust is primarily from public donations, although during the year money was also raised from fund raising events, mainly the successful Evergreen Christmas Cracker. These funds along with the contribution from the paid for services help to cover the administrative costs of the Trust, including general running costs and salaries of administrative staff.

All Evergreen income and reserves are used to provide services and support that benefit older and vulnerable members in the district it serves; Stamford, Bourne, Deepings and surrounding villages. Evergreen utilises the principle of tithing up to 10% of its income to support its subsidised paid for services, provide support to individual members experiencing financial hardship and to fund the development of new or improved care services for older and/or vulnerable people. These tithed, designated funds would in future be shown as a The Clive Dixon Hardship and Development Fund.

In 2023/24 the Trust had an income of £395,066 (£357,296 in 22/23) including donations and grants of £79,874. Expenditure in the year was £440,673 (£360,437 in 22/23) giving rise to a deficit of £45,607 (£3,141 deficit in 22/23). The year-on-year increase in income was due to growth in the paid for services in the early part of the year partly offset by a lower level of donations. The increase in service delivery costs was mainly due to improved pay for our front-line carers and additional management resources to improve and grow our range of 'no charge' services. The detailed results for the year and financial position of the charity are shown in the financial statements.

At the 31 March 2024 the charity had total reserves of £78,774, of which £12,316 was` restricted. These reserves were equivalent to just under 3 months of the planned expenditure over the coming year. The Trustees regularly monitored the level of reserves and aim to retain 3 months expenditure as a reasonable balance between the need to resource current expenditure and the need for longer term sustainability.

At the year-end the charity changed its accounting system to a more cost-effective solution and the Financial Procedures policy was updated and approved by the Trustees.

Future Developments

Recognising that the changing economic and social environment provides particular challenges to the elderly and vulnerable members of the community the ongoing aim of the Trust is to ensure the services continue to help support their needs and identify additional needs that may require changes to existing services or new services.

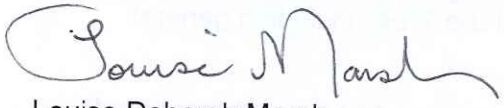
In the coming year the Trust aims to review the benefits of a digital platform to record and manage the paid for services more efficiently and improve the availability of information and improve communications between and to members, Evergreen carers, their supervisors and managers.

The Trust is also conscious of the growth of independent Personal Assistants providing care services. In the absence of regulation the Trust recognises the need to provide advice and signpost older people, and their families, with seeking care services to reliable, trained and empathic independent providers of care services.

Acknowledgement

The Evergreen Care Trust acknowledges the enormous public support and generosity of individuals, churches, community groups and local businesses. Without this support and that of our amazing volunteers and employees, so much of what Evergreen does in providing meaningful support and care for local people would not be achieved. To all our supporters we say thank you.

Signed on behalf of Trustees.



Louise Deborah Marsh
Founder & Trustee
July 2024

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF EVERGREEN CARE TRUST

I report on the accounts for the year ended 31 March 2024 set out on pages 11 to 19.

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 required.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, 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); and
- to state whether particular matters have come to my attention.

Basis of the independent examiner's report
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 statements below.

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 386 and 387 of the Companies Act 2006; and
- to prepare accounts which accord with the accounting records, comply with the accounting requirements of Sections 394 and 395 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities 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.

J Simmonds

Jan Simmonds ACMA CGMA (retired)

July 2024

STATEMENT OF FINANCIAL ACTIVITIES
FOR YEAR ENDED 31 MARCH 2024

	Note	Unrestricted Funds £	Restricted Funds £	Total 2024 £	Total 2023 £
Income and Endowments from:					
Donations & Legacies	2	79,874	-	79,874	102,831
Charitable activities	3	308,782	-	308,782	243,648
Trading activities	4	5,652	-	5,652	10,615
Investments	5	758	-	758	202
Total incoming resources		395,066	-	395,066	357,296
Expenditure on:					
Raising funds	6	415	-	415	360
Charitable activities	7	430,187	10,071	440,258	360,077
Total resources expended		430,602	10,071	440,673	360,437
Net expenditure		(35,536)	(10,071)	(45,607)	(3,141)
Fund balances brought forward		101,994	22,387	124,381	127,522
Transfers between funds	13	-	-	-	-
Fund balances carried forward		66,458	12,316	78,774	124,381

There are no recognised gains and losses other than those passing through the statement of financial activities.

All activities derive from continuing operations. There were no activities resulting from Endowment Funds.

BALANCE SHEET
AT 31 MARCH 2024

	Notes	Un-Restricted funds £	Restricted funds £	2024 Total funds £	2023 Total funds £
Fixed assets					
Tangible Assets	10	474	-	474	601
Current assets					
Debtors	11	21,654	-	21,654	26,509
Cash at bank and in hand		69,187	13,491	82,678	131,329
Total current assets		90,841	13,491	104,332	157,838
Creditors: amounts falling due within one year	12	24,857	1,175	26,032	34,058
Net current assets		65,984	12,316	78,300	123,780
Total assets less current liabilities		66,458	12,316	78,774	124,381
Net assets		66,458	12,316	78,774	124,381
FUNDS	13				
Restricted funds				12,316	22,387
Unrestricted funds:					
Designated funds				5,000	5,000
Other charitable funds				61,458	96,994
TOTAL FUNDS				78,774	124,381

The financial statements were approved by the Trustees on 16 July 2024 and signed on their behalf by:

Derek Risk
Trustee

CASH FLOW STATEMENT
FOR YEAR ENDED 31 MARCH 2024

	2024 £	2023 £
Operating deficit	(46,365)	(3,343)
Reconciliation to cash generated from operating activities		
Depreciation of tangible assets	126	347
Decrease / (Increase) in debtors	4,855	(1,715)
Decrease in creditors	(8,025)	(9,223)
Cash generated from operating activities	(49,409)	(13,934)
Cash generated from financing activities		
Interest received	758	202
Cashflow from Investing activities		
Payments to acquire tangible assets	-	(632)
Net decrease in cash	(48,651)	(14,364)
Cash at bank and in hand at beginning of year	131,329	145,693
Cash at bank and in hand at end of year	82,678	131,329
Consisting of:		
Cash at bank and in hand	82,678	131,329
	82,678	131,329

NOTES TO THE ACCOUNTS
FOR YEAR ENDED 31 MARCH 2024

1 ACCOUNTING POLICIES

Accounting convention
These accounts have been prepared under the historic cost convention and the Trustees have adopted the provisions for charities of the FRS102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

Incoming resources
All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy. Amounts not received are included in Trade Debtors. Tax reclaims are included when cash is received from HMRC.

Resources expended
Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets
Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

All equipment, fixtures & fittings	20% on cost

Taxation
The charity is exempt from corporation tax on its charitable activities.

Fund accounting
Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. The purpose of each restricted fund is included in the notes to the financial statements

Independent examination fee
The cost of the Independent examination included in these accounts is nil.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2024 (continued)

2 Grants, Donations & Legacies

		Total 2024 £	Total 2023 £
Un-restricted			
	Grants	4,182	-
	Donations	64,553	71,023
	Gift Aid Refunded	11,139	8,588
	Total	79,874	79,611
Restricted			
	Infection Control Grant	-	10,965
	Friends Together	-	12,255
		-	23,220

3 Income from Charitable Activities

		Total 2024 £	Total 2023 £
Un-restricted			
	Home Support	189,178	166,582
	Wellbeing	116,614	77,066
	Other	2,990	-
	Total	308,782	243,648
Restricted			
	None	-	-
		-	-

4 Income from Fund Raising

	Total 2024 £	Total 2023 £
Un-restricted	5,652	10,615

5 Investment income

	Total 2024 £	Total 2023 £
Bank interest received	758	202

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2024 (continued)

6 Expenditure on Fund Raising

	Total 2024 £	Total 2023 £
Un-restricted		
Publicity	90	20
Other Fundraising	325	340
	415	360

7 Expenditure on Charitable Activities

	Total 2024 £	Total 2023 £
Un-restricted activities		
Home Support	183,048	148,313
Wellbeing	62,130	40,105
Volunteer Services	36,854	16,221
Administration Wages	56,518	52,311
Other support costs	91,637	89,975
Total	430,187	346,925
Restricted		
Infection Control	3,693	3,661
Friends Together	6,378	9,491
Total	10,071	13,152

8 Trustees and Key Management Personnel remuneration and expenses

No trustee received remuneration or claimed expenses for their work as a trustee (2023: £Nil).
There were two key management employees during the year who received remuneration, pension contribuution and other benefits in the range of £25,000 to £30,000.
(2023: Three key management employees, two in the range £5,000 to £15,000 and one in the range £15,000 to £25,000)

9 Staff Costs and Numbers

	2024 £	2023 £
Wages and salaries	346,408	275,797
Social security costs	14,033	6,361
Pension costs	5,499	3,607
Total Staff Costs	365,940	285,765

The average monthly number of employees during the year was as follows:

2024	2023
26	25

No employee received emoluments in excess of £60,000 per annum.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2024 (continued)

10 Tangible Fixed Assets

Cost	Computer Equipment £	Office Equipment £	Angels Equipment £	Total £
At 1 April 2023	3,926	11,609	2,328	17,863
Additions	-	-	-	-
Disposals	(1,406)	(10,977)	-	(12,383)
At 31 March 2024	2,520	632	2,328	5,480
Depreciation				
At 1 April 2023	3,926	11,008	2,328	17,262
Charge for the year	-	126	-	126
Disposals and adjustments	(1,406)	(10,976)	-	(12,382)
At 31 March 2024	2,520	158	2,328	5,006
Net Book Value				
At 31 March 2024	-	474	-	474
At 31 March 2023	-	601	-	601

11 Debtors

	2024 £	2023 £
Trade Debtors	21,654	26,509
	21,654	26,509

12 Creditors: amounts falling due within one year

	2024 £	2023 £
Accruals	1,079	1,066
Other creditors	24,953	34,058
	26,032	35,124

13 Movement in Funds

	Opening Balance at 1.4.23	Incoming resources	Resources expended	Transfers between funds	Closing Balance at 31.3.24
	£	£	£	£	£
Unrestricted funds					
General fund	101,994	395,066	430,602	-	66,458
Restricted funds					
Clive Dixon Respite	3,951	-	-	-	3,951
Infection Control	7,304	-	3,693	-	3,611
Friends Together	9,003	-	6,378	-	2,625
Chaplaincy Training	2,050	-	-	-	2,050
UK Developments	79	-	-	-	79
	22,387	-	10,071	-	12,316
TOTAL FUNDS	**124,381**	**395,066**	**440,673**	**-**	**78,774**

14 Purposes of Restricted Funds

Clive Dixon Respite Fund
Provides treats, trips out and respite for those for whom these benefits would be financially prohibitive

Infection Control Grant
Grant to support ongoing infection control training costs

Friends Together
Grant to support twice weekly sessions to improve members mental wellbeing

Chaplaincy Training
Grant to support expenses on chaplaincy training course

UK Developments
Initiative to promote the Evergreen Model in other communities

15 Related party disclosures

There are no related parties.

16 Obligations under long term lease

The Trust has an obligation under a 10 year lease for premises which commenced on 1st April 2023 and includes a 5 year break clause. The commitment is shown below:

	Total at 31.3.24	Total at 31.3.23
	£	£
Under a year	8,848	-
1-5 years	26,544	-
TOTAL	**35,392**	**-**

THE EVERGREEN CARE TRUST

England & Wales - Charity number 1158271

Accounts

EVERGREEN CARE TRUST
(A Charitable Incorporated Organisation)

REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDING 31 MARCH 2023

Charity Registration No. 1158271

EVERGREEN CARE TRUST

CONTENTS OF THE FINANCIAL STATEMENTS FOR THE YEAR ENDING 31 MARCH 2023

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Cash Flow Statement	13
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REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023

The Trustees of the Charity present their report with the financial statements for the year ended 31 March 2023. The Trustees have adopted the provisions for charities of the FRS 102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

REFERENCE AND ADMINISTRATIVE DETAILS

All correspondence should be addressed to the charity's principal address:

The Evergreen Care Trust
Shyp House
1 Barnack Road
Stamford
Lincolnshire
PE9 2NA

TRUSTEES

- Nicholas Adams Chair
- Pamela Mary Dixon (Resigned 28 July 2022)
- Catherine Sarah Fitt
- Louise Deborah Marsh Founder
- Paul Herniman
- Derek Michael Risk
- Jo Peck (Appointed 28 July 2022)

Charity Patron: Mrs. Miranda Rock of Burghley

Mission, Values & Objectives

The Evergreen Care Trust is an established and trusted charity founded in 2005 to promote healthy ageing, honour old age and find meaningful ways to support older and vulnerable adults through advocacy, friendship, and practical support. The Trust was incorporated as a Charitable Incorporated Organisation on 1st December 2014 and is governed by a constitution.

New Trustees are selected and appointed by present members of the Trustee Board. The recruitment of Evergreen personnel both volunteers and employees is based on our values, sharing the same commitment and intention in supporting, training, equipping and caring for them as shown our member (service user) group.

Mission: To promote healthy ageing and attitudes towards older people, seeking relevant ways to honour old age and if needed, to serve through advocacy, friendship, and practical support.

Our Core Values

These remain foundational to our approach to care and relationships, ethos and activities.

Respect	We believe in the inestimable value of every human being without reservation.
Justice	We aspire to exercise the principles of truth, justice, and equity in all we do.
Service	We seek to nurture a care culture of serving throughout the organisation and into the wider community.
Training	We place great emphasis on development, equipping, and supporting all members of the Evergreen team.
Partnership	We highly esteem unity, collaboration and working together to make a difference.
Quality	We aspire to excellence without excess.
Generosity	We seek to demonstrate this, through grant giving, sharing resources, knowledge, and experience with partner colleagues.
Stewardship	We aspire to practice sound management of all funds and resources received.

Objectives

1. To ensure our vision and operations reflect the ethos and values on which the charity was founded.
2. To remain engaged with Neighbourhood Working (Health, Social Care and third sector collaborative working) Care network and consortium, and partnerships with local businesses, schools, colleges, churches, community groups and allied agencies.
3. Continue to monitor the demographic of the local community to ensure the Charity continues to provide the correct resource which matches the needs of our Members.
4. To maintain aspirations for excellence in all we do and provide, maintaining Good and Outstanding rating with the Care Quality Commission (CQC)
5. To exercise Value based recruitment and retain quality Evergreen personnel, engaged in the governance, administration, and delivery of our care provision, offering excellent working and pay conditions for employees and showing appreciation to our volunteers along with support and training.

Charity Registration Number 1158271

Strategies Employed to Achieve Objectives

1. As lock down procedures came to an end it provided an ideal opportunity to undertake a Service Review to see which of the Paid For and Volunteer Led services were still relevant and identify potential new initiatives to include in to the service mix provided. This project was carried out with the front line staff members and Volunteer Service Leads and was picked up by the new Senior Leadership Team when they started in January 2023. As part of the review a new paid post was created to help grow the Volunteer Led services which had been reduced leading in to and through the COVID 19 pandemic.

2. A new Senior Leadership Team was recruited to replace the leaving Registered care Manager (RCM) Director and Volunteer Service Coordinator. To allow focus to be brought to both sides of the Trust, Paid For and Volunteer Led, the new RCM post focuses solely on the Paid For services while the Volunteer Service Manager focuses on running the volunteer led activities. Both report to the Board of Trustees independently but are expected to work closely together to ensure that the services offered dovetail to provide members with a suite of complementary services depending on their needs.

3. Governance and management ensure that all activity, vision casting, and change management are measured against our core values and mission. This is cascaded to all levels through regular staff meetings and weekly staff briefings. The Governance Code is progressively being incorporated into our Trustee Induction procedure and meetings, influencing policy regarding recruitment of Trustees, assigning Trustees responsibilities, inclusion, diversity and equality. The Code has also been incorporated into the Risk Register. Regular team (All Lead) meetings were reinstituted in January and continue on the first Monday of each month. In February the Member's Committee meetings were also re-instituted with members agreeing to meet bi-monthly initially but have now recommended quarterly, unless there is a particular issue that demands an extraordinary meeting. The Board is proposing to invite service Leads, Supervisors and office admin staff to also meet regularly with the Trustees to encourage relationship building and understanding within the wider team. This has been well received by all levels of staff.

4. The Trust has established processes and procedures to ensure CQC compliance with national standards and best practice recommendations, and evidencing this. Our new CQC (Quality Compliance Systems) has been successfully implemented to ensure all the correct policies and procedures are in place to promote safe working practices. We have also implemented our new Bright HR system to record dissemination to staff, this will ensure on-going compliance as they update the regulations, in turn, updating the policies and procedures. The Founder, former inspected RCM & Notifiable Individual for the Evergreen Care Trust, Louise Marsh notified the CQC of the departure of the RCM in August 2022 and acted as Caretaker RCM until the appointment of Caroline Joyce RCM in January 2023.

5. Evergreen continues to maintain membership with the Clinical Research Network East Midlands & University of Lincoln's School of H&SC's RELEC network for Home Care providers. The team have undertaken surveys, Working parties and act in an advisory capacity for the Research Community engaging and developing relevant Social Care Research. There are a number of Home Care studies in the pipeline that Evergreen hopes to participate in. Evergreen considers evidence based practice vital in meeting CQC standards and demonstrating innovative, creative person centred best practice.

6. Evergreen has been registered as a National Living Wage employer since 2017. In line with this pay rates advised by the NLW Foundation giving front line staff a 10% increase. This was further supported with the separate payment of travel time between calls. In doing this the Trust also recognises the increased cost resulting from this which ultimately is borne by the service user.

7. The Volunteer Services Team have worked closely with service users and volunteers to reintroduce face to face befriending and other Volunteer Led activities, much needed after the time that many elderly and vulnerable people spent shielding during the pandemic. Volunteer service users are represented in the Member's committee and provide their views and recommendations.

8. The Building Better Mental Wealth project continued to go from strength to strength and the Trust secured funding from the Alan Boswell Group Charitable Trust. The members of this group suggested that they would like to re name the project and as a group they voted that the former BBMW be rebranded as the Friends Together Group.

9. During the COVID pandemic we have reviewed and implemented a tailormade training package for all staff and volunteers. This training includes revised Safeguarding which can be completed online or in written format. This continues to evolve to meet the need of our volunteers and staff. The online training is provided by an accredited Health & Social Care provider, is mandatory and enables CQC compliance. It is however widely recognised that the team getting together regularly to share knowledge, experience and group face to face learning is highly valued by volunteers and staff at all levels and this is being reintroduced as a matter of priority post Covid.

10. We continue to improve the celebration of our services via social media. We also are proactively involved in local and national promotions. An annual Volunteer Celebration is being re-visited with a forthcoming event planned, to acknowledge and celebrate the work of our volunteers and the difference they make in local people's lives.

11. The website was updated at the beginning of the year and given a new layout. It has allowed us to actively promote our paid for and volunteer services together with all activities, including our fundraising efforts and is regularly updated. This continues to evolve and improve to make it easier to read and navigate.

12. The Trust continues to ensure the safety of Members and staff by supplying all necessary PPE. All staff conduct a twice weekly lateral flow test, and they are registered on a weekly basis and results are reported and monitored to ensure safe working practice. All staff have also had their double COVID and booster vaccinations. The Trust continues to follow Government guidelines into post covid season.

13. Evergreen is the lead organisation representing the third sector in Neighbourhood Working in our district. Representatives meet monthly via zoom conference. Neighbourhood Working remains a key Evergreen activity while it enables a 'joined up approach' to the planning of care and support for local people. It has a special focus in our district on moderate to severe frailty, which represents a high percentage of our service user group. It is a privilege to represent the third sector in this hugely important integrated care forum. Direct contact with Neighbourhood

working is maintained and a specialist nurse has been assigned to support our member group.

14. Evergreen is also involved in the South Lincolnshire Alliance for Mental Health (SLAMH). This allows active networking between different stakeholders to promote the awareness and improvements required for Mental Health in the Community.

General

Evergreen in the last financial year provided support and care through its wide range of 'no charge' and 'paid for services' for over 300 people, their families, and carers, the majority of these received support through our volunteer led no charge services.

Success continues to be measured through feedback from service users, family, and carers as well as volunteers and staff through regular reviews, evaluation forms and notifications, letters and cards. Evergreen has an established reputation locally as a charity which responds to local need with compassion and commitment and for working collaboratively with statutory and other sector organisations for the benefit of local people.

The primary objective going into the financial year was to engage with our frontline staff and volunteer leads to undertake a review of services, and resources required to support those services. This was initially led by the Director & RCM along with the Volunteer Service Coordinator but was picked up by the Trustees when both these persons resigned. This was undertaken initially with a questionnaire to highlight key areas of strength, weakness and opportunities followed by group meetings to work through the various points. As a result the Trust constructed a Guaranteed Hours contract for those front line workers wanting to avail of more security in their hours. Training time was reverted to being paid at the full hourly rate rather than the discounted rate it had become, and paid travel time between calls was implemented. To improve resourcing of the two sides of the Trust commitment was made to hire a Social Engagement Lead to provide more paid support to the Volunteer Led activities and more Care Supervisor Hours were committed to the Care Suite so that the Trust could be more consistent and proactive in its ability to take on new service users.

As a result of the resignation of the Director & RCM and the Volunteer Service Coordinator focus shifted to finding suitable replacements to lead the two sides of the Trust. Appointments were made such that the new leadership came into effect on January 3rd 2023 and a three month induction plan was put in place to try and give exposure all aspects of the Trust.

Evergreen in representing the third sector maintains its contribution to Neighbourhood Working which is a fine example of integrated service provision and collaborative work to improve service efficacy and reduction of duplication and unnecessary waste. The intent is to join up services to enhance the care and support of persons especially those who are deemed frequent service users. The general benefit of this is to reduce unnecessary hospital admissions, the reduction in GP visits, and the promotion of positive wellbeing as the health and social care sector partner with the third sector to implement this strategy.
Evergreen considers it a great privilege to be allied to and engaged with this very proactive practice. The Director and RCM and or her team meet monthly with health, social care and allied colleagues for this purpose. We remain actively involved in knowledge sharing, participating in collaborative trials and projects and proudly represent the third sector in respect of this. We are convinced of the value of this approach to care provision and believe that it is local people who benefit from these efforts.

Evergreen remains committed to the support and valuing of its personnel. This includes pastoral care, wellbeing advice, professional development, regular supervision and support, and adherence to best Health & Safety practice in the office and in the field. The Trust is in its 6th year as a registered National Living Wage Employer.

Public Benefit

We believe that the supports and services the Trust has developed over 18 years, is now a vital resource for local older and vulnerable people and a strong partner with allied health and social care professionals. Most of our 'no charge' services are volunteer led and provide opportunities for social engagement, life enhancing activities, and support with practical matters. The 'not for profit' paid for services cover a range of low-level interventions and higher need regulated care activities for which local demand is high.
The Trust is committed to equality and diversity and welcome engagement with people from different communities and minorities without reserve, whether as service users or as Evergreen personnel.

Significant Activities

The Trust maintains its 8 'no charge' services with demand for most of these remaining high. We are in the process of reviewing our volunteer led services to ensure they continue to meet the needs of the community we service. The launch of our Volunteer led Building Better Mental Wealth project was launched in November 2021 and is going from strength to strength and has been extended to at least March 2023.

All our Volunteer Led Services are now all back up and running, with the exception of the Friendship Lunch Club as we learn to live with COVID in our communities which has affected demand for some services. The Volunteer services are supported by a register of 174 volunteers.
Our Befriending service has now been extended to offer a listening support. This listening support is now a welcomed addition to this service, not only to aid the Member through a particular personal or family crisis, with a view to Befriending once the crisis has been dealt with.

Our Wellbeing Warden service continues to assist individuals with their medication and nutrition and hydration and now also provides some personal care alongside those other services. Our paid for services, both Home Support and Wellbeing Service have assisted and cared for over 120 persons on a regular basis in the last financial year.

Evergreen's Assisted Living provision continues to be of value to the local community in that Evergreen will supply and fit only Police approved, Supra 500 Key safes, supply and manage Medication safes, and installation of the Evergreen Lifeline 24 Telecare service.

Partnership Activity

Friendship Lunch Club
Evergreen is in consultation with South Kesteven District Council on the potential re visiting of the Friendship Lunch Clubs which operated out of the former sheltered housing accommodation sites in Stamford, utilising their kitchens and dining facilities to provide social engagement with nutritious meals and informal health assessment. These talks are ongoing.

Friendship Tea

Following on from the previous partnership with Barn Hill Methodist Church, Dementia Support South Lincs and Evergreen to provide a monthly 'Dementia Café' the service was relaunched by Evergreen as the Friendship Tea and held monthly in the Stamford Free Church. The attendees have more than quadrupled! This gathering is considered a great local resource and offers fun, friendship and respite for carers of loved ones living with dementia. This is a volunteer led service and attracts volunteers who appreciate the difference this gathering makes for those living with dementia.

Research

As a Trust we are pleased to announce that we joined the Research, Learning & Excellence Community (RELEC) of Home Care providers funded by the NIHR Clinical Research Network East Midlands and the University of Lincoln School of Health & Social Care in July 2021. Further to this we were the first Home Care Provider to sign up to the join Dementia Research campaign. We pushed for this change as historically it was only for Care Homes and individuals to sign up. We have actively engaged with various Universities to take part in integral research that also helps us to improve the ways we work and serve our local community.

It is important to us that we lead the way in active participation in research for Dementia and social care research in general, nurturing a culture of research, learning and excellence within our organisation.

Our Founding Trustee Louise Marsh continues her Health & Social Care Research team role at the University of Lincoln and is furthering efforts to establish evidence based best practice moving away from time and task service delivery to self-managing teams focusing on whole person-centred care delivery and team practice.

Financial Review

The Evergreen Care Trust is a faith-based organisation and the funding of the ongoing free of charge services provided by the Evergreen Care Trust is primarily from public donations, although during the year money was also raised from fund raising events, mainly the successful Evergreen Christmas Cracker. These funds along with the contribution from the paid for services help to cover the administrative costs of the Trust, including general running costs and salaries of administrative staff.

In 2022/23 the Trust had an income of £357,296 (£408,393 in 21/22) including donations and grants of £102,831. Expenditure in the year was £360,473 (£364,008 in 21/22) giving rise to a deficit of £3,141 (surplus of £44,385 in 21/22). The year on year reduction in income was due to the decline in the Home Support service pending the outcome of the Service Review reported above as well as a lower level of donations. The lower relative reduction in costs was due to increases in pay and the costs of the new Friends Together project (previously BBMW). The detailed results for the year and financial position of the charity are shown in the financial statements.

At the 31 March 2023 the charity had total reserves of £124,381, of which £22,387 was` restricted. These reserves were equivalent to just under 4 months of the planned expenditure over the coming year. The Trustees regularly monitored the level of reserves

and aim to at least retain 3 months expenditure as a reasonable balance between the need to resource current expenditure and the need for longer term sustainability.

Future Plans

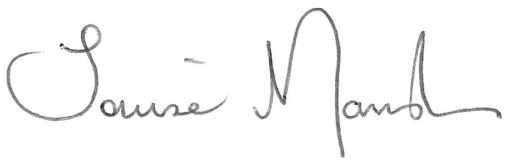
After a year of consolidation following on from the Covid Pandemic the Trust has in the current year been carrying out a consultation with stakeholders to review the need and effectiveness of all the current services both paid for and voluntary. The aim is to develop plans to ensure the services continue to meet the needs of the local community and identify additional needs that may require new services. The aim is to make any identified changes in time for the next financial year in April 2023.

This will result in a year of investment as the Trust sows seeds of faith by adding new members of staff on both the Paid For and Volunteer led side to provide the necessary resource required to provide the services, highlighted as necessary through the service review, to the standard to which the Trust demands.

Acknowledgement

The Evergreen Care Trust acknowledges the enormous public support and generosity of individuals, churches, community groups and local businesses. Without this support and that of our amazing volunteers and employees, so much of what Evergreen does in providing meaningful support and care for local people would not be achieved. To all our supporters we say thank you.

Signed on behalf of Trustees



Louise Deborah Marsh

Founder & Trustee

29 January 2024

EVERGREEN CARE TRUST

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF EVERGREEN CARE TRUST

I report on the accounts for the year ended 31 March 2023 set out on pages 10 to 18.

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 required.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, 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); and
- to state whether particular matters have come to my attention.

Basis of the independent examiner's report
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 statements below.

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 386 and 387 of the Companies Act 2006 ; and
- to prepare accounts which accord with the accounting records, comply with the accounting requirements of Sections 394 and 395 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities 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.

Jan Simmonds

Jan Simmonds ACMA CGMA

January 2024

STATEMENT OF FINANCIAL ACTIVITIES
FOR YEAR ENDED 31 MARCH 2023

	Note	Unrestricted Funds £	Restricted Funds £	Total 2023 £	Total 2022 £
Income and Endowments from:					
Donations & Legacies	2	79,611	23,220	102,831	127,550
Charitable activities	3	243,649	-	243,649	269,282
Trading activities	4	10,615	-	10,615	11,555
Investments	5	202	-	202	7
Total incoming resources		334,077	23,220	357,296	408,393
Expenditure on:					
Raising funds	6	360	-	360	3,278
Charitable activities	7	346,925	13,152	360,077	360,731
Total resources expended		347,285	13,152	360,437	364,008
Net income/(expenditiure)		(13,209)	10,068	(3,141)	44,385
Fund balances brought forward		115,203	12,319	127,522	83,137
Transfers between funds	13	-	-	-	-
Fund balances carried forward		101,994	22,387	124,381	127,522

There are no recognised gains and losses other than those passing through the statement of financial activities.

All activities derive from continuing operations. There were no activities resulting from Endowment Funds

BALANCE SHEET
AT 31 MARCH 2023

	Notes	Un-Restricted funds £	Restricted funds £	2023 Total funds £	2022 Total funds £
Fixed assets					
Tangible Assets	10	601	-	601	315
Current assets					
Debtors	11	26,509	-	26,509	24,794
Cash at bank and in hand		105,537	25,792	131,329	145,693
Total current assets		132,046	25,792	157,838	170,488
Creditors: amounts falling due within one year	12	30,653	3,405	34,058	43,281
Net current assets		101,393	22,387	123,780	127,207
Total assets less current liabilities		101,994	22,387	124,381	127,522
Net assets		101,994	22,387	124,381	127,522
FUNDS	13				
Restricted funds				22,387	12,319
Unrestricted funds:					
Designated funds				5,000	5,000
Other charitable funds				96,994	110,203
TOTAL FUNDS				124,381	127,522

The financial statements were approved by the Trustees on 29 January 2024 and signed on their behalf by:

Derek Risk
Trustee

CASH FLOW STATEMENT
FOR YEAR ENDED 31 MARCH 2023

	2023 £	2022 £
Operating surplus/(deficit)	(3,343)	44,378
Reconciliation to cash generated from operating activities		
Depreciation of tangible assets	347	504
Decrease in stock		
Decrease / (Increase) in debtors	(1,715)	4,935
(Decrease) / Increase in creditors	(9,223)	(618)
Cash generated from operating activities	(13,934)	49,198
Cash generated from financing activities		
Interest received	202	7
Cashflow from Investing activities		
Payments to acquire tangible assets	(632)	-
Net increase in cash	(14,364)	49,205
Cash at bank and in hand at beginning of year	145,693	96,488
Cash at bank and in hand at end of year	131,329	145,693
Consisting of:		
Cash at bank and in hand	131,329	145,693
	131,329	145,693

NOTES TO THE ACCOUNTS
FOR YEAR ENDED 31 MARCH 2023

1 ACCOUNTING POLICIES

Accounting convention
These accounts have been prepared under the historic cost convention and the Trustees have adopted the provisions for charities of the FRS102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

Incoming resources
All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy. Amounts not received are included in Trade Debtors. Tax reclaims are included when cash is received from HMRC.

Resources expended
Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets
Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

All equipment, fixtures & fittings	20% on cost

Taxation
The charity is exempt from corporation tax on its charitable activities.

Fund accounting
Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. The purpose of each restricted fund is included in the notes to the financial statements

Independent examination fee
The cost of the Independent examination included in these accounts is nil.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2023 (continued)

2 Grants, Donations & Legacies

		Total 2023 £	Total 2022 £
Un-restricted			
	Donations	71,023	79,391
	Legacies	-	13,662
	Gift Aid Refunded	8,589	19,869
	Total	79,611	112,922
Restricted			
	Infection Control Grant	10,965	2,634
	Friends Together	12,255	9,944
	Chapliancy Training	-	2,050
		23,220	14,628

3 Income from Charitable Activities

		Total 2023 £	Total 2022 £
Un-restricted			
	Home Support	166,583	191,450
	Wellbeing	77,066	77,492
	Other	-	340
	Total	243,649	269,282
Restricted			
	None	-	-

4 Income from Fund Raising

	Total 2023 £	Total 2022 £
Un-restricted	10,615	11,555

5 Investment income

	Total 2023 £	Total 2022 £
Bank interest received	202	7

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2023 (continued)

6 Expenditure on Fund Raising

		Total 2023 £	Total 2022 £
Un-restricted			
	Publicity	20	1,181
	Other Fundraising	340	2,097
		360	3,278

7 Expenditure on Charitable Activities

		Total 2023 £	Total 2022 £
Un-restricted activities			
	Home Support	148,313	155,844
	WellBeing	40,106	39,451
	Volunteer Services	16,221	17,099
	Administration Wages	52,311	47,554
	Other support costs	89,975	91,067
	Total	346,925	351,015
Restricted			
	Infection Control	3,661	2,634
	GGF Meals	-	3,376
	Friends Together	9,491	3,705
	Total	13,152	9,716

8 Trustees and Key Management Personnel remuneration and expenses

No trustee received remuneration or claimed expemses for their work as a trustee (2022: £Nil).
Due to staff changes there were three key management employees during the year who received remuneration, pension contributions and other benefits in the ranges £5,000 to £15,000 (2) and £15,000 to £25,000 (1), all part year.
(2022: One key management employee in range £35,000 to £45,000)

9 Staff Costs and Numbers

	2023 £	2022 £
Wages and salaries	275,410	283,206
Social security costs	6,748	6,934
Pension costs	3,607	3,552
Total Staff Costs	285,765	293,692

The average monthly number of employees during the year was as follows:

2023	2022
25	29

No employee received emoluments in excess of £60,000 per annum.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2023 (continued)

10 Tangible Fixed Assets

	Computer Equipment	Office Equipment	Angels Equipment	Total
Cost	£	£	£	£
At 1 April 22	3,926	10,976	2,328	17,230
Additions	-	632	-	632
At 31 March 2023	3,926	11,609	2,328	17,862
Depreciation				
At 1 April 2022	3,611	10,976	2,328	16,915
Charge for the year	315	32	-	347
Disposals and adjustments	-	-	-	-
At 31 March 2023	3,926	11,008	2,328	17,262
Net Book Value				
At 31 March 2023	-	601	-	601
At 31 March 2022	315	-	-	315

11 Debtors

	2023	2022
	£	£
Trade Debtors	26,509	24,713
Covid 19 Shopping Cash	-	81
	26,509	24,794

12 Creditors: amounts falling due within one year

	2023	2022
	£	£
Accruals	1,066	2,789
Income in Advance	-	10,965
Other creditors	34,058	32,216
	35,124	45,970

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED 31 MARCH 2023 (continued)

13 Movement in Funds

	Opening Balance at 1.4.22	Incoming resources	Resources expended	Transfers between funds	Closing Balance at 31.3.23
	£	£	£	£	£
Unrestricted funds					
General fund	115,203	334,076	347,285	-	101,994
Restricted funds					
Clive Dixon Respite	3,951	-	-	-	3,951
Infection Control	-	10,965	3,661	-	7,304
Friends Together	6,239	12,255	9,491	-	9,003
Chaplaincy Training	2,050	-	-	-	2,050
UK Developments	79	-	-	-	79
	12,319	23,220	13,152	-	22,387
TOTAL FUNDS	127,522.	357,296	360,437	-	124,381

14 Purposes of Restricted Funds

Clive Dixon Respite Fund
Provides treats, trips out and respite for those for whom these benefits would be financially prohibitive

Infection Control Grant
Grant to support ongoing infection control training costs

Friends Together (previously BBMW)
Grant to support twice weekly sessions to improve members mental wellbeing

Chaplaincy Training
Garnt to support expenses on chaplaincy training course

UK Developments
Initiative to promote the Evergreen Model in other communities

15 Related party disclosures

There are no related parties.

THE EVERGREEN CARE TRUST

England & Wales - Charity number 1158271

Accounts

EVERGREEN CARE TRUST
(A Charitable Incorporated Organisation)

REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDING 31 MARCH 2022

Charity Registration No. 1158271

EVERGREEN CARE TRUST

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EVERGREEN CARE TRUST

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2022

The Trustees of the Charity present their report with the financial statements for the year ended 31 March 2022. The Trustees have adopted the provisions for charities of the FRS 102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

REFERENCE AND ADMINISTRATIVE DETAILS

All correspondence should be addressed to the charity's principal address

The Evergreen Care Trust
Shyp House
1 Barnack Road
Stamford
Lincolnshire
PE9 2NA

TRUSTEES

- Nicholas Adams Chair
- Pamela Mary Dixon (Resigned 28 July 2022)
- Catherine Sarah Hardy
- Louise Deborah Marsh Founder
- Paul Herniman
- Derek Michael Risk
- Jo Peck (Appointed 28 July 2022)

Charity Patron: Mrs. Miranda Rock of Burghley

Mission, Values & Objectives

The Evergreen Care Trust is an established and trusted charity founded in 2005 to promote healthy ageing, honour old age and find meaningful ways to support older and vulnerable adults through advocacy, friendship, and practical support. The Trust was incorporated as a Charitable Incorporated Organisation on 1st December 2014 and is governed by a constitution.

New Trustees are selected and appointed by present members of the Trustee Board.
The recruitment of Evergreen personnel both volunteers and employees is based on our values, sharing the same commitment and intention in supporting, training, equipping and caring for them as shown our member (service user) group.

Mission: To promote healthy ageing and attitudes towards older people, seeking relevant ways to honour old age and if needed, to serve through advocacy, friendship, and practical support.

Our Core Values

These remain foundational to our approach to care and relationships, ethos and activities.

Respect	We believe in the inestimable value of every human being without reservation.
Justice	We aspire to exercise the principles of truth, justice, and equity in all we do.
Service	We seek to nurture a care culture of serving throughout the organisation and into the wider community.
Training	We place great emphasis on development, equipping, and supporting all members of the Evergreen team.
Partnership	We highly esteem unity, collaboration and working together to make a difference.
Quality	We aspire to excellence without excess.
Generosity	We seek to demonstrate this, through grant giving, sharing resources, knowledge, and experience with partner colleagues.
Stewardship	We aspire to practice sound management of all funds and resources received.

Objectives

1. To ensure our vision and operations reflect the ethos and values on which the charity was founded.
2. To maintain aspirations for excellence in all we do and provide, maintaining Good and Outstanding rating with the Care Quality Commission (CQC)
3. To exercise Value based recruitment and retain quality Evergreen personnel, engaged in the governance, administration, and delivery of our care provision, offering excellent working and pay conditions for employees and showing appreciation to our volunteers along with support and training.
4. To remain engaged with Neighbourhood Working (Health, Social Care and third sector collaborative working) Care network and consortium, and partnerships with local businesses, schools, colleges, churches, community groups and allied agencies. Coupled with this objective, we will continue to monitor the local demographic community to ensure the Charity continues to provide the correct resource which matches the needs of our Members.

Charity Registration Number 1158271

5. To continue to build quality and up to date training for ECT personnel in nurturing well equipped, competent and caring practitioners.

Strategies employed to achieve Objectives

1. Governance and management ensure that all activity, vision casting, and change management are measured against our core values and mission. This is cascaded to all levels through regular staff meetings and weekly staff briefings. The Governance Code is progressively being incorporated into our Trustee Induction procedure and meetings, influencing policy regarding recruitment of Trustees, assigning Trustees responsibilities, inclusion, diversity and equality. The Code has also been incorporated into the Risk Register.

2. The Trust has established processes and procedures to ensure CQC compliance with national standards and best practice recommendations, and evidencing this. Our new CQC (Quality Compliance Systems) has been successfully implemented to ensure all the correct policies and procedures are in place to promote safe working practices. We have also implemented our new Bright HR system to record dissemination to staff, this will ensure on-going compliance as they update the regulations, in turn, updating the policies and procedures.

3. Evergreen has been registered as a National Living Wage employer since 2017. The Trust continues to work towards replacing zero contracts with guaranteed hours for all staff and is reviewing the model of Care delivery to improve both working conditions and person-centred care delivery. The pay rate increment is normally implemented in May of each year, but this was brought forward to April in response to the rising cost of living.

4. The Volunteer Services Team has focussed efforts on learning to live with COVID and has carried out a service review of our Volunteer Led Services. We will update accordingly with our findings and outcomes. The Befriending Service continues to be telephone service as well as face to face as we recognise some members are still apprehensive about mixing due to COVID. We continue to communicate effectively via emails, our quarterly newsletter, and social media posts continue to promote the Trust. Our annual Suzi Wheatley Award will be made at the AOM.

5. In November of last year, we launched our new Building Better Mental Wealth project. This allowed a place for lonely, isolated individuals, over the age of 65, to attend the club for fun activities, such as, chair aerobics, art, flower arranging and bingo. We also had a nurse in attendance so people could approach them if they had any health concerns, and this could be escalated if necessary to their GP. We also linked with social prescribing, and they brought isolated people along too. This project has been a true success. It has allowed people to forge new friendships not only within the project but continue these outside of it too. It has also increased our volunteer uptake as the community feels it meets their needs.

6. During the COVID pandemic we have reviewed and implemented a tailormade training package for all staff and volunteers. This training includes revised Safeguarding which can be completed online or in written format. This continues to evolve to meet the need of our volunteers and staff.

7. We continue to improve the celebration of our services via social media. We also are proactively involved in local and national promotions.

8. The website was updated at the beginning of the year and given a new layout. It has allowed us to actively promote our paid for and volunteer services together with all activities, including our fundraising efforts and is regularly updated. This continues to evolve and improve to make it easy read and easy to navigate for all members of the community.

9. The Trust continues to ensure the safety of Members and staff by supplying all necessary PPE. All staff conduct a twice weekly lateral flow test, and they are registered on a weekly basis and results are reported and monitored to ensure safe working practice. All staff have also had their double COVID and booster vaccinations.

10. Evergreen is the lead organisation representing the third sector in Neighbourhood Working in our district. Representatives meet monthly via zoom conference. Neighbourhood Working remains a key Evergreen activity while it enables a 'joined up approach' to the planning of care and support for local people. It has a special focus in our district on moderate to severe frailty, which represents a high percentage of our service user group. It is a privilege to represent the third sector in this hugely important integrated care forum.

11. Evergreen is also involved in the South Lincolnshire Alliance for Mental Health (SLAMH). This allows active networking between different stakeholders to promote the awareness and improvements required for Mental Health in the Community.

General

Evergreen in the last financial year provided support and care through its wide range of 'no charge' and 'paid for services' for over 300 people, their families, and carers, the majority of these received support through our volunteer led no charge services.

Success continues to be measured through feedback from service users, family, and carers as well as volunteers and staff through regular reviews, evaluation forms and notifications, letters and cards. Evergreen has an established reputation locally as a charity which responds to local need with compassion and commitment and for working collaboratively with statutory and other sector organisations for the benefit of local people.

Evergreen in representing the third sector maintains its contribution to Neighbourhood Working which is a fine example of integrated service provision and collaborative work to improve service efficacy and reduction of duplication and unnecessary waste. The intent is to join up services to enhance the care and support of persons especially those who are deemed frequent service users. The general benefit of this is to reduce unnecessary hospital admissions, the reduction in GP visits, and the promotion of positive wellbeing as the health and social care sector partner with the third sector to implement this strategy.
Evergreen considers it a great privilege to be allied to and engaged with this very proactive practice. The Director and RCM and or her team meet monthly with health, social care and allied colleagues for this purpose. We remain actively involved in knowledge sharing, participating in collaborative trials and projects and proudly represent the third sector in respect of this. We are convinced of the value of this approach to care provision and believe that it is local people who benefit from these efforts.

Evergreen remains committed to the support and valuing of its personnel. This includes pastoral care, wellbeing advice, professional development, regular supervision and support, and adherence to best Health & Safety practice in the office and in the field. The Trust is in its 5th year as a registered National Living Wage Employer.

Public Benefit

We believe that the supports and services the Trust has developed over 16 years, is now a vital resource for local older and vulnerable people and a strong partner with allied health and social care professionals. Seven of our 'no charge' services are volunteer led and provide opportunities for social engagement, life enhancing activities, and support with practical matters. The 'not for profit' paid for services cover a range of low-level interventions and higher need regulated care activities for which local demand is high.
The Trust is committed to equality and diversity and welcome engagement with people from different communities and minorities without reserve, whether as service users or as Evergreen personnel.

Significant Activities

The Trust maintains its 8 'no charge' services with demand for most of these remaining high. We are in the process of reviewing our volunteer led services to ensure they continue to meet the needs of the community we service. The launch of our Volunteer led Building Better Mental Wealth project was launched in November 2021 and is going from strength to strength and has been extended to at least March 2023.

All our Volunteer Led Services are now all back up and running, with the exception of the Friendship Lunch Club as we learn to live with COVID in our communities which has affected demand for some services. The Volunteer services are supported by a register of 174 volunteers.
Our Befriending service has now been extended to offer a listening support. This listening support is now a welcomed addition to this service, not only to aid the Member through a particular personal or family crisis, with a view to Befriending once the crisis has been dealt with.

Our Wellbeing Warden service continues to assist individuals with their medication and nutrition and hydration. Our paid for services, both Home Support and Wellbeing Service have assisted and cared for over 110 persons on a regular basis in the last financial year.

Evergreen's Assisted Living provision continues to be of value to the local community in that Evergreen will supply and fit only Police approved, Supra 500 Key safes, supply and manage Medication safes, and installation of the Evergreen Lifeline 24 Telecare service.

Partnership Activity

Friendship Lunch Club

In March 2020, our friendship lunch club hosted at Morrisons Supermarket was suspended due to COVID restrictions and lockdown. Unfortunately, due to the transport no longer being available this has not been relaunched. We are still looking at ways to restart this lunch club in the future.

Friendship Tea (Dementia Café)

In September of 2019, Evergreen in partnership with Barn Hill Methodist Church who provided their lovely Well café facility, Dementia Support South Lincs who provided their expert personnel and Evergreen who provided willing and interested volunteers, together

launched a monthly 'Dementia Café' which we have simply called a Friendship Tea with no reference to dementia. This has relaunched and we have recently moved premises to the Stamford Free Church. The attendees have more than quadrupled! Such a great success.

Research

As a Trust we are pleased to announce that we joined the Research, Learning & Excellence Community (RELEC) of Home Care providers funded by the NIHR Clinical Research Network East Midlands and the University of Lincoln School of Health & Social Care in July 2021. Further to this we were the first Home Care Provider to sign up to the join Dementia Research campaign. We pushed for this change as historically it was only for Care Homes and individuals to sign up. We have actively engaged with various Universities to take part in integral research that also helps us to improve the ways we work and serve our local community.

It is important to us that we lead the way in active participation in research for Dementia and social care research in general, nurturing a culture of research, learning and excellence within our organisation.

Our Founding Trustee Louise Marsh continues her Health & Social Care Research team role at the University of Lincoln and is furthering efforts to establish evidence based best practice moving away from time and task service delivery to self-managing teams focusing on whole person-centred care delivery and team practice.

Financial Review

The Evergreen Care Trust is a faith-based organisation and the funding of the ongoing free of charge services provided by the Evergreen Care Trust is primarily from public donations, although during the year money was also raised from fund raising events, mainly the successful Evergreen Christmas Cracker and the Anniversary Ball that had been delayed by the Covid pandemic. These funds along with the contribution from the paid for services help to cover the administrative costs of the Trust, including general running costs and salaries of administrative staff.

In 2021/22 the Trust had an income of £408,393 (£438,555 in 20/21) including donations and grants of £127,550. Expenditure in the year was £364,008 (£411,028 in 20/21) giving rise to a surplus of £44,385. The reduction in year on year income and expenditure was mainly related to the Covid grants and costs in the previous year. The detailed results for the year and financial position of the charity are shown in the financial statements.

At the 31 March 2022 the charity had total reserves of £127,522, of which just £12,319 was` restricted. These reserves were equivalent to just under 4 months of the planned expenditure over the coming year. The Trustees regularly monitored the level of reserves and aim to at least retain 3 months expenditure as a reasonable balance between the need to resource current expenditure and the need for longer term sustainability.

Future Plans

After a year of consolidation following on from the Covid Pandemic the Trust has in the current year been carrying out a consultation with stakeholders to review the need and effectiveness of all the current services both paid for and voluntary. The aim is to develop plans to ensure the services continue to meet the needs of the local community and identify additional needs that may require new services. The aim is to make any identified changes in time for the next financial year in April 2023.

Acknowledgement

The Evergreen Care Trust acknowledges the enormous public support and generosity of individuals, churches, community groups and local businesses. Without this support and that of our amazing volunteers, so much of what Evergreen does in providing meaningful support and care for local people would not be achieved. Thank you.

Signed on behalf of Trustees

Nicholas Adams

Chair

September 2022

Louise Deborah Marsh

Founder & Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF EVERGREEN CARE TRUST

I report on the accounts for the year ended 31 March 2022 set out on pages 10 to 17.

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 required.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, 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); and
- to state whether particular matters have come to my attention.

Basis of the independent examiner's report
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 statements below.

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 386 and 387 of the Companies Act 2006 ; and
- to prepare accounts which accord with the accounting records, comply with the accounting requirements of Sections 394 and 395 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities 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.

Michael Pring FCA September 2022

EVERGREEN CARE TRUST

STATEMENT OF FINANCIAL ACTIVITIES
FOR YEAR ENDED 31 MARCH 2022

	Note	Unrestricted Funds £	Restricted Funds £	Total 2022 £	Total 2021 £
Income and Endowments from:					
Donations & Legacies	2	112,921	14,628	127,550	172,277
Charitable activities	3	269,281	0	269,281	266,091
Trading activities	4	11,555	0	11,555	176
Investments	5	7	0	7	12
Total incoming resources		393,765	14,628	408,393	438,555
Expenditure on:					
Raising funds	6	3,278		3,278	286
Charitable activities	7	351,015	9,716	360,730	410,742
Total resources expended		354,292	9,716	364,008	411,028
Net income/(expenditiure)		39,472	4,913	44,385	27,527
Fund balances brought forward		75,731	7,406	83,137	55,610
Transfers between funds	13	-	-	-	-
Fund balances carried forward		115,203	12,319	127,522	83,137

There are no recognised gains and losses other than those passing through the statement of financial activities.

All activities derive from continuing operations. There were no activities resulting from Endowment Funds

BALANCE SHEET
AT 31 MARCH 2022

	Notes	Un-Restricted funds £	Restricted funds £	2022 Total funds £	2021 Total funds £
Fixed assets					
Tangible Assets	10	315	-	315	819
Current assets					
Debtors	11	24,794		24,794	29,729
Cash at bank and in hand		138,337	7,356	145,693	96,488
Total current assets		163,131	7,356	170,488	126,217
Creditors: amounts falling due within one year	12	39,875	3,405	43,281	43,899
Net current assets		123,256	3,951	127,207	82,318
Total assets less current liabilities		123,571	3,951	127,522	83,137
Net assets		123,571	3,951	127,522	83,137
FUNDS	13				
Restricted funds				12,319	7,406
Unrestricted funds:					
Designated funds				5,000	5,000
Other charitable funds				110,203	70,731
TOTAL FUNDS				127,522	83,137

The financial statements were approved by the Trustees on 20 September and signed on their behalf by:

Derek Risk
Trustee

CASH FLOW STATEMENT
FOR YEAR ENDED 31 MARCH 2022

	2022 £	2021 £
Operating surplus/(deficit)	44,378	27,515
Reconciliation to cash generated from operating activities		
Depreciation of tangible assets	504	504
Decrease in stock		
Decrease / (Increase) in debtors	4,935	(1,821)
(Decrease) / Increase in creditors	(618)	16,064
Cash generated from operating activities	49,198	42,262
Cash generated from financing activities		
Interest received	7	12
Cashflow from Investing activities		
Payments to acquire tangible assets	-	-
Net increase in cash	49,205	42,274
Cash at bank and in hand at beginning of year	96,488	54,214
Cash at bank and in hand at end of year	145,693	96,488
Consisting of:		
Cash at bank and in hand	145,693	96,488
	145,693	96,488

NOTES TO THE ACCOUNTS
FOR YEAR ENDED 31 MARCH 2021

1 ACCOUNTING POLICIES

Accounting covention
These accounts have been prepared under the historic cost convention and the Trustees have adopted the provisions for charities of the FRS102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

Incoming resources
All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy. Amounts not received are included in Trade Debtors. Tax reclaims are included when cash is received from HMRC.

Resources expended
Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets
Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

All equipment, fixtures & fittings	20% on cost

Taxation
The charity is exempt from corporation tax on its charitable activities.

Fund accounting
Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. The purpose of each restricted fund is included in the notes to the financial statements

Independent examination fee
The cost of the Independent Examination included in these accounts is nil.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2022 (continued)

2 Donations & Legacies

		Total 2022 £	Total 2021 £
Un-restricted			
	Donations	79,391	83,685
	Legacies	13,662	5,000
	Gift Aid Refunded	19,869	7,286
	Covid 19 Grant	-	25,000
	Total	112,921	120,971
Restricted			
	Infection Control Grant	2,634	45,480
	GGF Meals	-	4,825
	UK Operations	-	1,000
	BBMW	9,944	-
	Chaplinancy Training	2,050	-
		14,628	51,306

3 Income from Charitable Activities

		Total 2022 £	Total 2021 £
Un-restricted			
	Home Support	191,450	199,691
	Wellbeing	77,492	66,156
	Home Nursing	-	0
	Meals	-	
	Other	340	244
	Total	269,281	266,091
Restricted			
	None	-	-
		-	-

4 Income from Fund Raising

	Total 2022 £	Total 2021 £
Un-restricted	11,555	176

5 Investment income

	Total 2022 £	Total 2021 £
Bank interest received	7	12

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2022 (continued)

6 Expenditure on Fund Raising

	Total 2022 £	Total 2021 £
Un-restricted		
Publicity	1,181	36
Other Fundraising	2,097	250
	3,278	286

7 Expenditure on Charitable Activities

	Total 2022 £	Total 2021 £
Un-restricted activities		
Home Support	155,844	168,061
WellBeing	39,451	33,040
Evergreen Plus	-	10,412
Volunteer Services	17,099	16,162
Administration Wages	47,554	47,828
Other support costs	91,067	87,259
Total	351,015	362,761
Restricted		
GGF Florence Care	0	130
Infection Control	2,634	45,480
GGF Meals	3,376	1,450
UK Operations	-	921
BBMW	3,705	-
Total	9,716	47,981

8 Trustees and Key Management Personnel remuneration and expenses

No trustee received remuneration or claimed expemses for their work as a trustee (2021: £Nil).
There was only one key management employee who received remuneration, including pension contributions and other benefits in the range £35,000 to £45,000.
(2021: Two key staff totalling £46,921)

9 Staff Costs and Numbers

	2022 £	2021 £
Wages and salaries	283,206	289,049
Social security costs	6,934	5,507
Pension costs	3,552	5,104
Total Staff Costs	293,692	299,660

The average monthly number of employees during the year was as follows:

2022	2021
29	28

No employee received emoluments in excess of £60,000 per annum.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2022 (continued)

10 Tangible Fixed Assets

Cost	Computer Equipment £	Office Equipment £	Angels Equipment £	Total £
At 1 April 21	3,926	10,976	2,328	17,230
Additions	-	-	-	-
At 31 March 2022	3,926	10,976	2,328	17,230
Depreciation				
At 1 April 2021	3,107	10,976	2,328	16,411
Charge for the year	504	-	-	504
Disposals and adjustments	-	-	-	-
At 31 March 2022	3,611	10,976	2,328	16,915
Net Book Value				
At 31 March 2022	315	-	-	315
At 31 March 2021	819	-	-	819

11 Debtors

	2022 £	2021 £
Trade Debtors	24,713	29,428
Covid 19 Shopping Cash	81	301
	24,794	29,729

12 Creditors: amounts falling due within one year

	2022 £	2021 £
Accruals	2,789	
Income in Advance	10,965	13,599
Other creditors	32,316	30,300
	46,070	43,899

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2022 (continued)

13 Movement in Funds

	Opening Balance at 1.4.21	Incoming resources	Resources expended	Transfers between funds	Closing Balance at 31.3.22
	£	£	£	£	£
Unrestricted funds					
General fund	75,731	393,765	354,292		115,203
Restricted funds					
Clive Dixon Respite	3,951	-	-	-	3,951
Infection Control	-	2,634	2,634	-	-
BBMW	-	9,944	3,705		6,239
Chaplinancy Training	-	2,050	-		2,050
GGF Meals	3,376	-	3,376	-	0
UK Developments	79	-	-	-	79
	7,406	14,628	9,716	-	12,319
TOTAL FUNDS	83,137.	408,393	364,008	-	127,522

14 Purposes of Restricted Funds

Clive Dixon Respite Fund
Provides treats, trips out and respite for those for whom these benefits would be financially prohibitive

LCC Infection Control Grant
Covid related grant to support infection control costs

BBMW
Grant to support twice weekly sessions to improve members mental wellbeing

Chaplaincy Training
Garnt to support expenses on chaplinancy training course.

Global Giving Fund Meals
Grant to provide Hot & Wholesome lunches to the elderly during Covid. Ended May 2021

UK Developments
Initiative tp promote the Evergreen Model in other communities

15 Related party disclosures

There are no related parties.

THE EVERGREEN CARE TRUST

England & Wales - Charity number 1158271

Accounts

EVERGREEN CARE TRUST
(A Charitable Incorporated Organisation)

REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDING 31 MARCH 2021

Charity Registration No. 1158271

EVERGREEN CARE TRUST

CONTENTS OF THE FINANCIAL STATEMENTS FOR THE YEAR ENDING 31 MARCH 2021

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REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2021

The Trustees of the Charity present their report with the financial statements for the year ended 31 March 2021. The Trustees have adopted the provisions for charities of the FRS 102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

REFERENCE AND ADMINISTRATIVE DETAILS

All correspondence should be addressed to the charity's principal address
The Evergreen Care Trust
Shyp House
1 Barnack Road
Stamford
Lincolnshire
PE9 2NA

Shyp House is also the communications address for the Evergreen Care Stamford & District which is the operating name for the part of the Trust providing all the Evergreen services for Stamford, Bourne & The Deepings.

TRUSTEES

- Nicolas Bertrand (Resigned 6 September 2021)
- Pamela Mary Dixon
- Catherine Sarah Hardy
- Louise Deborah Marsh Founder & CEO
- Nicholas Adams
- Paul Herniman
- Derek Michael Risk

Charity Patron: Mrs. Miranda Rock of Burghley

Mission, Values & Objectives

The Evergreen Care Trust is an established and trusted charity founded in 2005 to promote healthy ageing, honour old age and find meaningful ways to support older and vulnerable adults through advocacy, friendship, and practical support. The Trust was incorporated as a Charitable Incorporated Organisation on 1st December 2014 and is governed by a constitution.

New Trustees are selected and appointed by present members of the Trustee Board.
The recruitment of Evergreen personnel both volunteers and employees are based on our organisational values, sharing the same commitment and intention in supporting, training, equipping, and caring for them as shown our member (service user) group.

Mission: To promote healthy ageing and attitudes towards older people, seeking relevant ways to honour old age and if needed, to serve through advocacy, friendship, and practical support.

Our Core Values

These remain foundational to our approach to care and relationships, ethos and activities.

Respect	We believe in the inestimable value of every human being without reservation.
Justice	We aspire to exercise the principles of truth, justice, and equity in all we do.
Service	We seek to nurture a care culture of servicing throughout the organisation and into the wider community.
Training	We place great emphasis on development, equipping, and supporting all members of the Evergreen team.
Partnership	We highly esteem unity, collaboration and working together to make a difference.
Quality	We aspire to excellence without excess.
Generosity	We seek to demonstrate this, through grant giving, sharing resources, knowledge, and experience with partner colleagues.
Stewardship	We aspire to practice sound management of all funds and resources received.

Objectives

1. To ensure our vision and operations reflect the ethos and values on which the charity was founded.
2. To maintain aspirations for excellence in leadership and all that we do and provide, maintaining Good and Outstanding rating with the Care Quality Commission (CQC)
3. To exercise Value based recruitment and retain quality Evergreen personnel, engaged in the governance, administration, and delivery of our care provision, offering alternative models of care delivery and excellent, working and pay conditions for employees and showing appreciation to our volunteers, along with support and training.
4. To remain engaged with Neighbourhood Working (Health, Social Care and third sector collaborative working) Care network and consortium, and partnerships with local businesses, schools, colleges, churches, community groups and allied agencies. Coupled with this objective, we will continue to monitor the local demographic community to ensure the Charity continues to provide the appropriate resources, meeting the needs of our Members and local people.

5. To continue to update existing services and develop new services of care delivery along with the essential bespoke training programs in response to the changing and increasing complex needs in the field and demand in the district for this provision.
6. To continue to build quality and up to date evidence based training for all personnel in nurturing well equipped, competent and compassionate practitioners.

Strategies employed to achieve Objectives

1. Governance and management ensure that all activity, vision casting, and change management are measured against our core values and mission. This is cascaded to all levels through regular staff meetings and weekly staff briefings. The Governance Code is progressively being incorporated into our Trustee Induction procedure and meetings, influencing policy regarding recruitment of Trustees, assigning Trustees responsibilities, diversity and equality. It has also been incorporated into the Risk Register.

2. The Trust has established processes and procedures to ensure CQC compliance with national standards and best practice recommendations, evidencing this. Since the year-end the charity has registered with QCS (Quality Compliance Systems) to ensure that all the correct policies and procedures are in place to promote safe working practices. In addition, along with a new HR system to record dissemination to staff, this will ensure on-going compliance as they update the regulations, in turn, updating the policies and procedures.

3. Evergreen has been registered as a National Living Wage employer since 2017. The Trust continues to work towards replacing zero contracts with guaranteed hours for all staff, and is reviewing the model of Care delivery to improve both working conditions and person centred care delivery. The pay rate increment is normally implemented in May of each year.

4. The Volunteer Services Team has necessarily focussed efforts on dealing with the COVID pandemic. This has impacted the recruitment of new volunteers but has still enabled her to re-engage in important ways with the existing army of volunteers and partnership working with other stakeholders to meet the needs of the community. During this time, we adapted our Volunteer Led Services, specifically Befriending, due to some Members being advised to shield. The Befriending Service became a telephone service as opposed to face to face. This enabled us to maintain contact with the vulnerable Members of the community and still provide this valuable free service. We also achieved the APS accreditation which is a true external validation and a reflection of the Befriending Service. Effective communication has been maintained and improved. Emails, a newly devised quarterly newsletter, and social media posts continue to promote the Trust. Due to the pandemic nominations were not invited last year for the Suzi Wheatley Award for Evergreen Volunteer. We will be opening the nomination process for this year's award.

5. During the COVID pandemic we have reviewed and implemented a tailormade training package for all staff and volunteers. This training includes revised Safeguarding which can be completed online or in written format. All our training was briefly suspended when restrictions were at their highest, however this programme is now fully underway.

6. We have newly devised Volunteer literature sponsored by a local business. This has been printed and will be distributed to all relevant stakeholders.

7. We continue to improve the celebration of our services via social media. We also are proactively involved in local and national promotions.

8. We have relaunched our new refreshed website to keep pace with changing times. It has allowed us to actively promote our paid for and volunteer services together with all activities, including our fundraising efforts and is regularly updated.

9. During the COVID pandemic the Trust ensured the safety of Members and staff by supplying all necessary PPE and continues to do so. All staff are given a weekly PCR test kit which is registered on a weekly basis and results are reported and monitored to ensure safe working practice. All staff have also had their double COVID vaccination.

10. Evergreen is the lead organisation representing the third sector in Neighbourhood Working in our district. Representatives meet fortnightly via zoom conference during the lockdown. Neighbourhood Working remains a key Evergreen activity while it enables a 'joined up approach' to the planning of care and support for local people. It has a special focus in our district on moderate to severe frailty, which represents a high percentage of our service user group. It is a privilege to represent the third sector in this hugely important integrated care forum.

11. Evergreen is also involved in the newly formed South Lincolnshire Alliance for Mental Health (SLAMH). This allows active networking between different stakeholders to promote the awareness and improvements required for Mental Health in the Community.

12. The South West Care Network met bi-monthly during 2020 at the Christ Church venue until Covid restrictions prevented further meetings. Contact with members was maintained via e mails and by forwarding updates. In March 2021 we received sponsorship for the purpose of creating an e newsletter which we are looking forward to distributing in April and bi-monthly thereafter.
Despite Covid the network remains a valuable connection between multi sector providers supporting older and vulnerable adults in the region. The Network would have celebrated its 10th Anniversary in January 2021 but due to restrictions the planned event around cake was cancelled. Together, Network members continue to further develop efforts to maintain and invite new members engaged in any kind of health and social care provision. Members of the network look forward to resumption of face to face meetings, the bring and share lunch and informal networking once Covid restrictions allow.

13. Florence Care remains suspended and under review until the service can be linked to a whole person-centred bespoke training program designed for a hybrid role (social care and low-level health care) incorporating self-managing teams and evidence-based practice, supporting local community engagement and working. Louise Marsh (Founder) is in negotiation with the Clinical Research Network East Midlands, University of Lincoln, Skills for Health, New College Stamford Health & Social Care departments, and local agencies dealing with Mental Health – Mindspace, Dementia – Dementia Support South Lincs, and End of Life care – St. Barnabas. These are relevant and complex areas of need evident in our community. We will continue to seek funding and review resource.

General

Evergreen in the last financial year provided support and care through its wide range of 'no charge' and 'paid for services' for approximately 600 people, their families, and carers, the

majority of these received support through our volunteer led no charge services.

Success continues to be measured through feedback from service users, family, and carers as well as volunteers and staff through regular reviews, evaluation forms and notifications, letters and cards. Evergreen has an established reputation locally as a charity which responds to local need with compassion and commitment and for working collaboratively with statutory and other sector organisations for the benefit of local people.

Evergreen in representing the third sector maintains its contribution to Neighbourhood Working which is a fine example of integrated service provision and collaborative work to improve service efficacy and reduction of duplication and unnecessary waste. The intent is to join up services to enhance the care and support of persons especially those who are deemed frequent service users. The general benefit of this is to reduce unnecessary s hospital admissions, the reduction in GP visits, and the promotion of positive wellbeing as the health and social care sector partner with the third sector to implement this strategy. Evergreen considers it a great privilege to be allied to and engaged with this very proactive practice. The Director and RCM and or her team meets fortnightly with health, social care and allied colleagues for this purpose. We remain actively involved in knowledge sharing, participating in collaborative trials and projects and proudly represent the third sector in respect of this. We are convinced of the value of this approach to care provision and believe that it is local people who benefit from these efforts.

Evergreen remains committed to the support and valuing of its personnel. This includes pastoral care, wellbeing advice, professional development, regular supervision and support, and adherence to best Health & Safety practice in the office and in the field. The Trust is in its 4th year as a registered National Living Wage Employer.

Public Benefit

We believe that the supports and services the Trust has developed over 16 years, is now a vital resource for local older and vulnerable people and a strong partner will allied health and social care professionals. Seven of our 'no charge' services are volunteer led and provide opportunities for social engagement, life enhancing activities, and support with practical matters. The 'not for profit' paid for services cover a range of low-level interventions and higher need regulated care activities for which local demand is high.
The Trust is committed to equality and diversity and welcome engagement with people from different communities and minorities without reserve, whether as service users or as Evergreen personnel.

Significant Activities

The Trust maintains its 7 'no charge' services with demand for these remaining high apart from the Hospital to Home Service which sadly, is our least used service. The lack of demand for this service has more to do with the challenges the local hospital has in working with volunteers and the pressure of time scales for discharge and secondly, the increasing complexity of cases being discharged home, deemed in appropriate for volunteers to manage safely and appropriately. This service tends to be used for those of our existing members when we are aware of their admission into hospital and prepare to support them when they are due to return home.

All our Volunteer Led Services have been put on hold due to COVID restrictions, with the exception of Befriending, Chaplaincy and Advocacy which have all become a telephone service. The Volunteer services can report over 5200 volunteer member events/actions through our service provision in this financial year.

Our Befriending service has now been extended to offer a listening support. This listening support is an interim measure only to aide the Member through a particular personal or family crisis, with a view to Befriending once the crisis has been dealt with.

The NCVO Mentoring and Befriending Approved Provider Standard was awarded to us in December 2020. This was a large piece of work that required meetings over zoom due to the pandemic.

Our Wellbeing Warden service continues to assist individuals with their medication and nutrition and hydration. Our paid for services, both Home Support and Wellbeing Service have assisted and cared for over 120 persons on a regular basis in the last financial year.

Evergreen's Assisted Living provision continues to be of value to the local community in that Evergreen will supply and fit only Police approved, Supra 500 Key safes, supply and manage Medication safes, and installation of the Evergreen Lifeline 24 Telecare service.

Partnership Activity

Friendship Lunch Club

In March 2020, our friendship lunch club hosted at Morrisons Supermarket was suspended due to COVID restrictions and lockdown. We endeavour to re-instate this, once restrictions end. In the meantime, we provided a soup service, from February 2021 to May 2021, in partnership with Stamford Free Church and Second Helpings, to support 20 members of the community, some of whom would have benefitted from the Friendship Lunch Club.

In addition, we partnered with Cook of Stamford. They donated frozen meals and we delivered them to the most vulnerable and we continue to work alongside them with this venture.

Friendship Tea (Dementia Café)

In September of 2019, Evergreen in partnership with Barn Hill Methodist Church who provided their lovely Well café facility, Dementia Support South Lincs who provided their expert personnel and Evergreen who provided willing and interested volunteers, together launched a monthly 'Dementia Café' which we have simply called a Friendship Tea with no reference to dementia. This is suspended due to COVID restrictions and lockdown.

New College Stamford – H&SC student of the year

For 6 years now, Evergreen has provided an annual award to the New College Stamford Health & Social Care student of the Year. This takes place each June in a special award ceremony for the wide range of subjects covered and student nominees. Due to COVID restrictions there was no ceremony but the award was given to a first year student who had faced a number of challenges throughout the year but always presented herself and her work with commitment and excellent attitude. This student will be continuing into Year 2.

Lincoln University Research Project

The Evergreen Care Trust were involved in a 3-year research study with the University of Lincoln, Birmingham and Brighton. This project explored how older people experience the process of finding and paying for personal care from their own resources in three local

authority areas in England. Please visit this link to access the full report under "publications" on the website: www.olderpeopleselffundingcare.com/publications/final-report/

Our Trustee Louise Marsh has now joined the Health & Social Care Research team at the University of Lincoln and is furthering efforts to establish evidence based best practice moving away from time and task service delivery to self-managing teams focusing on whole person-centred care delivery and team practice.

Financial Review

The Evergreen Care Trust is a faith based organisation and the funding of the ongoing free services is primarily from public fundraising and donations. The Covid pandemic significantly curtailed the normal fundraising activities, but local supporters continued to donate generously to fund these activities for the local community. As a rate payer the charity also received a Covid support grant from SKDC. These funds along with the contribution from the paid for services help to cover the administrative costs of the Evergreen Care Trust, including general running costs and salaries of administrative staff. The additional infection control costs during the pandemic were also supported by a grant from Lincolnshire County Council.

In 2020/21 the Trust had an income of £438,555 including donations and grants of £172,277. Expenditure in the year was £411,028 giving rise to a surplus of £27,527. The contribution from paid for services was lower due to the limited availability of care staff to meet the demand for home care services from members. The detailed results for the year and financial position of the charity are shown in the financial statements.

At the 31 March 2021 the charity had total reserves of £83,137, of which just £7,406 was restricted. These reserves were equivalent to just over 10 weeks of the planned expenditure over the coming year. The Trustees regularly monitored the level of reserves and aim to at least maintain the current level being a reasonable balance between the need to resource current expenditure and the need for longer term sustainability.

During the year the Trust introduced Evergreen Care Stamford & District as a new operating name for all the services provided for the local communities in Stamford, Bourne and The Deepings. The Trust also launched an initiative to further promote the Evergreen Friendship model in other local communities in the surrounding area through the local Churches Together groups. Grants and Expenditure related to this initiative are ring-fenced within the accounts as a restricted fund.

Future Plans

On the 1 April 2021 a new Director and RCM post was created within the charity to lead the new Evergreen Care Stamford & District unit providing all the Evergreen services to the local area community as well as the administrative service for the Trust as a whole.
In the coming year the focus of the Trustees will be on restoring all the Evergreen services to normal operation as Covid restrictions ease, consistent with the safety and wellbeing of our staff and members. The aim will also be to grow the restored services using recruitment initiatives and by updating marketing material to ensure all stakeholders are aware of the range of paid for and volunteer services available to support the care needs of the local community.

Also on 1 April 2021 Louise Marsh our Founder and Trustee stepped down from the employed CEO post but will continue in the role on a part-time and voluntary basis to support the Director with vision casting and strategic issues. Louise will also continue with:

a) support to existing Evergreen licensees and promoting the creation and development of the Evergreen model of Befriending (and other Evergreen services if relevant) in faith communities outside of the Stamford & District area.
b) further work on the development of whole person-centred care delivery, through self-managing teams and bespoke training for hybrid role (health & social care)
c) representing Evergreen Care Trust at a national level on issues and concerns related to the support of older and vulnerable people and those who care for them and to advocate improvements to the delivery of care services in the community in a safe, affordable, and efficient way.

Acknowledgement

The Evergreen Care Trust acknowledges the enormous public support and generosity of individuals, churches, community groups and local businesses. Without this support and that of our amazing volunteers, so much of what Evergreen does in providing meaningful support and care for local people would not be achieved. Thank you.

Signed on behalf of Trustees



Louise Deborah Marsh

Founder & Trustee

9 September 2021

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF EVERGREEN CARE TRUST

I report on the accounts for the year ended 31 March 2021 set out on pages 9 to 16.

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 required.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, 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); and*
- *to state whether particular matters have come to my attention.*

Basis of the independent examiner's report
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 statements below.

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 386 and 387 of the Companies Act 2006 ; and*
- *to prepare accounts which accord with the accounting records, comply with the accounting requirements of Sections 394 and 395 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities 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.

Michael Pring FCA  27th September 2021

STATEMENT OF FINANCIAL ACTIVITIES
FOR YEAR ENDED 31 MARCH 2021

	Note	Unrestricted Funds £	Restricted Funds £	Total 2021 £	Total 2020 £
Income and Endowments from:					
Donations & Legacies	2	120,971	51,306	172,277	130,090
Charitable activities	3	266,091	0	266,091	288,145
Trading activities	4	176	0	176	13,930
Investments	5	12	0	12	23
Total incoming resources		387,249	51,306	438,555	432,188
Expenditure on:					
Raising funds	6	286		286	4,295
Charitable activities	7	362,761	47,981	410,742	446,481
Total resources expended		363,047	47,981	411,028	450,776
Net income/(expenditiure)		24,202	3,325	27,527	(18,588)
Fund balances brought forward		51,529	4,081	55,610	74,198
Transfers between funds	13	-	-	-	-
Fund balances carried forward		75,731	7,406	83,137	55,610

There are no recognised gains and losses other than those passing through the statement of financial activities.

All activities derive from continuing operations. There were no activities resulting from Endowment Funds

BALANCE SHEET
AT 31 MARCH 2021

	Notes	Un-Restricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
Fixed assets					
Tangible Assets	10	819	-	819.00	1,323
Current assets					
Debtors	11	29,729		29,729	27,908
Cash at bank and in hand		78,938	17,550	96,488	54,214
Total current assets		108,667	17,550	126,217	82,122
Creditors: amounts falling due within one year	12	30,300	13,599	43,899	27,835
Net current assets		78,367	3,951	82,318	54,287
Total assets less current liabilities		79,186	3,951	83,137	55,610
Net assets		79,186	3,951	83,137	55,610
FUNDS	13				
Restricted funds				7,406	4,081
Unrestricted funds:					
Designated funds				5,000	-
Other charitable funds				70,731	51,529
TOTAL FUNDS				83,137	55,610

The financial statements were approved by the Trustees on 9 September 2021 and signed on their behalf by:

Derek Risk
Trustee

CASH FLOW STATEMENT
FOR YEAR ENDED 31 MARCH 2021

	2021 £	2020 £
Operating surplus/(deficit)	27,515	(18,611)
Reconciliation to cash generated from operating activities		
Depreciation of tangible assets	504	640
Decrease in stock		
Decrease / (Increase) in debtors	(1,821)	7,828
(Decrease) / Increase in creditors	16,064	(5,655)
Cash generated from operating activities	42,262	(15,799)
Cash generated from financing activities		
Interest received	12	23
Cashflow from Investing activities		
Payments to acquire tangible assets	-	-
Net increase in cash	42,274	(15,776)
Cash at bank and in hand at beginning of year	54,214	69,990
Cash at bank and in hand at end of year	96,488	54,214
Consisting of:		
Cash at bank and in hand	96,488	54,214
	96,488	54,214

NOTES TO THE ACCOUNTS
FOR YEAR ENDED 31 MARCH 2021

1 ACCOUNTING POLICIES

Accounting covention
These accounts have been prepared under the historic cost convention and the Trustees have adopted the provisions for charities of the FRS102 Statement of Recommended Practice (SORP) effective for reporting periods starting after 1 January 2016.

Incoming resources
All incoming resources are included in the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy. Amounts not received are included in Trade Debtors. Tax reclaims are included when cash is received from HMRC:

Resources expended
Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets
Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

All equipment, fixtures & fittings	20% on cost

Taxation
The charity is exempt from corporation tax on its charitable activities.

Fund accounting
Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. The purpose of each restricted fund is included in the notes to the financial statements

Independent examination fee
The cost of the Independent Examination included in these accounts is nil.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2021 (continued)

2 Donations & Legacies

		Total 2021 £	Total 2020 £
Un-restricted			
	Donations	83,685	114,084
	Legacies	5,000	
	Gift Aid Refunded	7,286	16,006
	Covid 19 Grant	25,000	
	Total	120,971	130,090
Restricted			
	Infection Control Grant	45,480	0
	GGF Meals	4,825	0
	UK Operations	1,000	0
		51,306	-

3 Income from Charitable Activities

		Total 2021 £	Total 2020 £
Un-restricted			
	Home Support	199,691	222,257
	Wellbeing	66,156	64,992
	Home Nursing	-	317
	Meals		
	Other	244	579
	Total	266,091	288,145
Restricted			
	None	-	-
		-	-

4 Income from Fund Raising

	Total 2021 £	Total 2020 £
Un-restricted	176	13,930

5 Investment income

	Total 2021 £	Total 2020 £
Bank interest received	12	23

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2021 (continued)

6 Expenditure on Fund Raising

		Total 2021 £	Total 2020 £
Un-restricted			
	Publicity	36	1,051
	Other Fundraising	250	3,244
		286	4,295

7 Expenditure on Charitable Activities

		Total 2021 £	Total 2020 £
Un-restricted activities			
	Home Support	168,061	207,327
	WellBeing	33,040	39,238
	Home Nursing	-	199
	Meals	-	-
	Evergreen Plus	10,412	34,458
	Volunteer Services	16,162	18,556
	Befriending	-	3,241
	Advocacy	-	-
	Hospital to Home	-	-
	Administration Wages	47,828	55,228
	Other support costs	87,259	48,349
	Total	362,761	406,595
Restricted			
	GGF Florence Care	130	39,886
	Infection Control	45,480	-
	GGF Meals	1,450	-
	UK Operations	921	-
	Total	47,981	39,886

8 Trustees and Key Management Personnel remuneration and expenses

No trustee received remuneration or claimed expemses for their work as a trustee (2020: £Nil).
One trustee is employed as CEO and for this role received total remuneration,
including pension contributions and other benefits in the range £10,000 - £20,000
There was one other key management employee who together received remuneration,
including pension contributions and other benefits totalling £46,921 (2020: £72,745)

9 Staff Costs and Numbers

	2021 £	2020 £
Wages and salaries	289,049	359,021
Social security costs	5,507	12,090
Pension costs	5,104	4,470
Total Staff Costs	299,660	375,581

The average monthly number of employees during the year was as follows:

2021	2020
28	29

No employee received emoluments in excess of £60,000 per annum.

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2021 (continued)

10 Tangible Fixed Assets

Cost	Computer Equipment £	Office Equipment £	Angels Equipment £	Total £
At 1 April 20	3,926	10,976	2,328	17,230
Additions	-	-	-	-
At 31 March 2021	3,926	10,976	2,328	17,230
Depreciation				
At 1 April 2020	2,603	10,976	2,328	15,907
Charge for the year	504	-	-	504
Disposals and adjustments	-	-	-	-
At 31 March 2021	3,107	10,976	2,328	16,411
Net Book Value				
At 31 March 2021	819	-	-	819
At 31 March 2020	1,323	-	-	1,323

11 Debtors

	2021 £	2020 £
Trade Debtors	29,428	27,081
Covid 19 Shopping Cash	301	827
	29,729	27,908

12 Creditors: amounts falling due within one year

	2021 £	2020 £
SKDC Shopping Cash Loan	-	1,000
Accruals	-	577
Income in Advance	13,599	
Other creditors	30,300	26,258
	43,899	27,835

NOTES TO THE ACCOUNTS
FOR THE YEAR ENDED IN 31 MARCH 2021 (continued)

13 Movement in Funds

	Opening Balance at 1.4.20 Incoming	Incoming resources	Resources expended	Transfers between funds	Closing Balance at 31.3.21
	£	£	£	£	£
Unrestricted funds					
General fund	51,529	387,249	363,047		75,731
Restricted funds					
Clive Dixon Respite	3,951	-	-	-	3,951
GGF Florence Care	130	-	130	-	-
Infection Control	-	45,480	45,480	-	-
GGF Meals	-	4,825	1,450	-	3,376
UK Developments	-	1,000	921	-	79
	4,081	51,306	47,981	-	7,406
TOTAL FUNDS	55,610.	438,555	411,028	-	83,137

14 Purposes of Restricted Funds

Clive Dixon Respite Fund
Provides treats, trips out and respite for those for whom these benefits would be financially prohibitive

Global Giving Fund Florence Care
Grant to fund startup costs of new nursing care service and new Care Manager salary for two years

LCC Infection Control Grant
Covid related grant to support infection control costs

Global Giving Fund Meals
Grant to provide Hot & Wholesome lunches to the elderly during Covid.

UK Developments
Initiative tp promote the Evergreen Model in other communities

15 Related party disclosures

There are no related parties.