



**CHARITY COMMISSION  
FOR ENGLAND AND WALES**

## **Trustees' Annual Report for the period**

**From 1<sup>st</sup> August 2023 Period start date To 31<sup>st</sup> July 2024  
Period end date**

**Charity name: BELVOIR VALE RDA**

**Charity registration number: 1162970**

## **Objectives and Activities**

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>The Charity provides disabled people with the opportunity to ride and drive to benefit their health and wellbeing.</b>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<b>The Charity provides equestrian opportunities specifically for children and adults with physical, sensory and learning difficulties in order for them to gain therapeutic benefit and have the chance to achieve.</b>  <b>These include riding therapy and training, competitions, training on horse care and stable management, and educational activities: and specific projects aimed at providing therapy including Hippotherapy.</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>Belvoir Vale RDA treats each rider as an individual, tailoring its support to their specific requirements. The Charity provides specialist tuition by RDA qualified coaches and supported by trained volunteers without whom most of the participants that the group works with would not be able to access riding activities.</b>

## **Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
	Para 1.38	

Policy on social investment including program related investment		
Contribution made by volunteers	Para 1.38	<p><b>Belvoir Vale RDA primarily relies on volunteers to operate- with only 1 full time member of staff and 1 part timer.</b></p> <p><b>During the last year the Volunteer Team has grown from about 25 individuals to over 60. All are bound by their desire to help and support the disabled participants whether it is within the RDA sessions, helping with yard duties or helping at special events.</b></p>
Other		

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>This has been a transformative year for the group and one which we should all be immensely proud.</b></p> <p><b>Right at the start of this reporting year, we successfully moved into our purpose built, accessible friendly Centre which puts the participants needs and the welfare at the heart of all we do.</b></p> <p><b>It was long in the planning and build and it is wonderful to see it fulfilling its role-facilitating our participants to achieve their individual potential.</b></p> <p><b>The number of participants accessing our services has grown from 26 to over 120 registered with the group and we delivered over 1840 sessions.</b></p> <p><b>We now work with 7 school groups for children with Additional needs and we have 2 new ponies taking the number of ponies we use up to 10.</b></p> <p><b>Demand for our services still exceeds supply with over 25 individuals on our waiting list.</b></p>



**Additional information (optional)**

You may choose to include further statements where relevant about:

<p>Achievements against objectives set</p>	<p>Para 1.41</p>	<p>The range of equine based activities has grown and now includes regular weekly Hippotherapy Sessions. These are professionally led by our Specially qualified Physiotherapist and form an important focus for our Wednesday afternoon sessions. This is a unique activity for us within the Nottinghamshire groups, allowing participants who wouldn't normally be able to be accommodated within RDA, to experience the therapy and enjoyment horses can give.</p> <p>We have introduced regular Tea with a Pony events when we invite people living with Dementia in Care Homes or live within the local vicinity to meet our wonderful ponies and have a chat over a cup of tea and a slice of cake served on fine bone china.</p> <p>The group is now ready to start Carriage Driving and will welcome new participants during the next year to experience this exciting new activity.</p> <p>15 of our independent riders represented the group at the Regional competitions with 12 qualifying for the RDA National Championships- 3 winning national titles.</p> <p>The Group are proud to offer Supported Volunteer opportunities. These valued members of our Volunteer Team will be an important focus for us in the future and we need to ensure we can support and expand their role with Belvoir Vale RDA.</p>
<p>Performance of fundraising activities against objectives set</p>	<p>Para 1.41</p>	<p>At the start of the year our monetary reserves were below where the Trustees assessed they needed to be. A financial plan was developed by the treasurer and business manager.</p> <p>The group has now taken over the responsibility and venue of the Non-RDA riding lessons and livery services. The Charity now also benefits from the fees from the hire of the facilities when not in use by the RDA and support for the ponies care through our Pony Partnership scheme.</p>

		These income streams have quickly helped to raise the reserves held to a more comfortable level.
Investment performance against objectives	Para 1.41	
Other		<p>The group were extremely grateful for a large donation (£50,000) for us to acquire a Mechanical Horse. This will be a valuable new additional activity and offers great potential to expand our participant numbers.</p> <p>This diversification relieves relieves pressure on our ridden herd and facilitates therapeutic benefits to a wider community.</p>



## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>At the end of the period, the charity's financial position is in a good position with an 8 months survival runway. The charity will endeavour to get it to 10 months over the next year.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>The charity's policy for holding a sum equivalent to 8 months running costs is to support essential staff costs and upkeep of the ponies should a situation arise when our charitable activities can't be undertaken such as during an epidemic.</b>
Amount of reserves held	Para 1.22	<b>At the end of the period the charity held £47,790 in reserves.</b>
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<p><b>The charity's principal sources of funds were from fees for provision of RDA sessions, regular donations, fees from the hire of our facilities and provision of livery services.</b></p> <p><b>As the number of RDA ponies increases the livery service will reduce.</b></p> <p><b>The fees charged for RDA sessions are subsidised and are lower than those for the non-RDA sessions.</b></p>
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	<b>Constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>Trustees are elected at the AGM by the Members of the Charity for a 3 year term.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<p><b>Risk management is covered in the RDA "Essentials of Membership" which sets out the standards and procedures by which the charity operates, including the minimum standard of qualification of the people responsible for the activity at any time.</b></p> <p><b>The charity works with children and vulnerable people and the trustees have jointly and individually declared they have carried out all the trustee eligibility tests that are required by law.</b></p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<b>To promote the objects of the Riding for the Disabled Association incorporating Carriage Driving. A charity registered under charity number 244108 (RDA) by providing disabled people with the opportunity to ride and/or drive to benefit their health and well-being in the Belvoir Vale area.</b>
Relationship with any related parties	Para 1.51	
Other		

### Reference and Administrative details

Charity name	BELVOIR VALE RDA
Other name the charity uses	
Registered charity number	1162970



Charity's principal address	4, HALL GROUNDS DRIVE COLSTON BASSETT NOTTINGHAM NG12 3FX

How is the charity constituted?	Part 10	CIC
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Part 11	Trustees are elected at the AGM by the Members of the Charity for a 3 year term.

#### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Part 12	Trust management is covered in the RGA 'Statement of Membership' which sets out the standards and procedures by which the charity operates, including the minimum standards of qualification of the people responsible for the activity at any time.
The charity's organisational structure and any work network with which the charity works	Part 13	The charity works with children and vulnerable people and the trustees have jointly and individually declared they have carried out all the trustee eligibility tests that are required by law.
Relationship with any related parties	Part 14	To promote the objects of the Riding for the Disabled Association incorporating Carriage Driving. A charity registered under charity number 244102 (RDA) by providing disabled people with the opportunity to ride and/or drive to benefit their health and well-being in the Silverdale area.
Other		

#### Reference and Administrative details

Charity name	Silverdale Riding for the Disabled Association
Other name the charity uses	
Registered charity number	244102

### Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	LESLEY DAVIES	CHAIRMAN		
2	NIKIN PATEL	TREASURER after 15/11/24	27/03/24 to present	
3	NATALIE MOUNTAIN	SECRETARY		
4	LISA LEATH-BOROUGH		21/03/24 to present	
5	LOIS CALLAGHAN	SAFE-GUARDING OFFICER		
6	CATHERINE BRIGHTMAN	TREASURER (resigned)	19/6/24 – 15/11/24	
7	EDYTA JAKUBOWSKA	TREASURER (resigned)	22/2/23-19/6/24	
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

### Corporate trustees – names of the directors at the date the report was approved

Director name		

### Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	none
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

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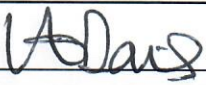
### Other optional information

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Lesley Anne Davies	
Position (eg Secretary, Chair, etc)	Chair	
Date	26/3/25	





Charity Name <b>BELVOIR VALE RDA</b>	No (if any) <b>1162970</b>
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## Receipts and payments accounts

**CC16a**

For the period from	Period start date 01-Aug-23	To	Period end date 31-Jul-24
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Uniform	157	-	-	157	120
Donations & Regular Giving	63,863	-	-	63,863	158,669
Fundraising	445	-	-	445	-
RDA Riding lessons	27,846	-	-	27,846	14,852
Able bodied Riding Lessons	4,665	-	-	4,665	-
Arena Hire	5,395	-	-	5,395	-
Livery	20,416	-	-	20,416	-
gift Aid/misc	34,480	-	-	34,480	1,877
Special events	2,243	-	-	2,243	1,483
<b>Sub total (Gross income for AR)</b>	<b>159,510</b>	<b>-</b>	<b>-</b>	<b>159,510</b>	<b>177,001</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>159,510</b>	<b>-</b>	<b>-</b>	<b>159,510</b>	<b>177,001</b>
<b>A3 Payments</b>					
Hire of Equestrian facilities	1,820	-	-	1,820	9,430
Livery/horse care costs	20,065	-	-	20,065	15,913
Horse purchase	6,950	-	-	6,950	9,500
Employees	35,015	-	-	35,015	-
Specific causes	-	-	-	-	118,516
capital projects	52,750	-	-	52,750	20,000
Tack & equipment	774	-	-	774	-
uniform	405	-	-	405	-
RDA Fees & Insurance	2,996	-	-	2,996	681
Expenses/Misc	3,723	-	-	3,723	409
Electricity	124	-	-	124	219
Training	183	-	-	183	-
Special Events	2,578	-	-	2,578	2,261
<b>Sub total</b>	<b>127,382</b>	<b>-</b>	<b>-</b>	<b>127,382</b>	<b>176,929</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>127,382</b>	<b>-</b>	<b>-</b>	<b>127,382</b>	<b>176,929</b>
<b>Net of receipts/(payments)</b>	<b>32,127</b>	<b>-</b>	<b>-</b>	<b>32,127</b>	<b>72</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>15,663</b>	<b>-</b>	<b>-</b>	<b>15,663</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>47,790</b>	<b>-</b>	<b>-</b>	<b>47,790</b>	<b>72</b>



# Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>				
		47,790	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	47,790	-	-

(agree balances with receipts and payments account(s))

OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>				
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>				
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>				
	Club House	unrestricted	-	-
	Pony- Ali	unrestricted	-	-
	Pony - Tommy	unrestricted	-	-
	Pony - Roma	unrestricted	-	-
	Pony - Alfie	unrestricted	-	-
	Pony - Finn	unrestricted	-	-
	Pony - Puddle	unrestricted	-	-
	Pony - Bonnie	unrestricted	-	-
	Pony - Kitkat	unrestricted	-	-

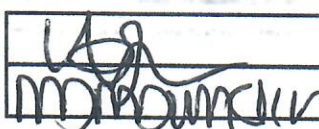
Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>				
			-	
			-	
			-	
			-	

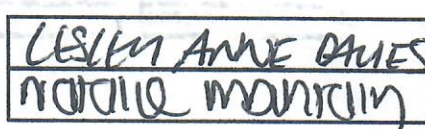
Signed by one or two trustees on behalf of all the trustees

Signature

Print Name

Date of approval

  
LESLEY ANNE DAVIES

  
NATALIE MORRISON

6/10/24  
6/10/24





CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

Section A

### Independent Examiner's Report

Report to the trustees

Charity Name

BELVOIR VALE RDA

On accounts for the year  
ended

31 JULY 2024

Charity no  
(if any)

1162970

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 07 2024

Responsibilities and  
basis of report

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

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

Independent  
examiner's statement

~~[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [ ] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (~~other than that disclosed below\*~~) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

\* Please delete the words in the brackets if they do not apply.

Signed:

PJ Williams

Date:

6/10/2024

Name:

PENELOPE JANE WILLIAMS

Relevant professional  
qualification(s) or body

CHARTERED ACCOUNTANT

(if any):

Address:

MONKS WAY, HAGGNOOK WOOD  
RAVENSHED,  
NOTTS, NG15 9HE

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.