



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	11	2022		31	10	2023

Section A Reference and administration details

Charity name Sullivan's Heroes

Other names charity is known by

Registered charity number (if any) 1163021

Charity's principal address 74 Selsfield Road

Turners Hill

West Sussex

Postcode RH10 4PW

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	Fiona Smith	Secretary		
2	Richard Smith	Treasurer		
3	Helen Broderick	Chair		
4	Lia Lunn			
5	Amanda Cooper			

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Unincorporated Association
Trustee selection methods (eg. appointed by, elected by)	New trustees are appointed by the existing trustees and serve for one year after which they may put themselves forward for re-appointment. All trustees give their time freely and no remuneration or expenses were paid in the year. Fiona Smith remains a Trustee whilst being employed as Operations Manager, as authorised by the Charity Commission and agreed with the Trustee Board.

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Upon appointment, new trustees sign a Trustee Eligibility Declaration, committing to dedicating their time and expertise.

New trustees are given information including a history of the charity and its objects, a copy of the governing Constitution Document and a copy of the Charity Commission's guidance '*The essential trustee: what you need to know, what you need to do*'.

Previous years' annual reports and accounts are discussed with trustees at trustee meetings, together with the broad strategy and areas of activity for the charity.

A Conflicts of Interest Policy and Register of Interests is maintained and adhered to.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

To relieve the needs of children with disabilities and their families by the provision of grants and financial assistance to adapt their home to accommodate the child's needs as a way of improving their quality of life within their home environment.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Sullivan's Heroes provides its fundraising platform and grant making policy to achieve its objects for the public benefit to improve the lives of disabled children, requiring significant adaptations to their homes, to ensure the children can continue to be cared for at home, safely and with dignity.

Together with raising funds towards grants for disabled children, Sullivan's Heroes also enables families to promote fundraising activities for their child's adaptations project should they wish to, by providing a website platform where public donations can be made.

Sullivan's Heroes accepts applications from families with disabled children requiring support. The families who apply need to adapt their homes to meet the medical and care requirements of their disabled child and require to raise funds to meet the costs where they are above the statutory Disabled Facilities Grants, and any additional discretionary funding, available from the local authority, and the costs cannot be met elsewhere.

The charity has carried out fundraising throughout the year to raise funds for grants, via fundraising activities, sourcing corporate donations and funding from charitable organisations, and through direct donations.

Trustees of Sullivan's Heroes have had regard to the commission's public benefit guidance, and this has been taken into account in all operations and decision making within the charity.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Families apply to Sullivan's Heroes through an application process via the website or by direct email, phone and postal contact methods.

One of the qualifying criteria for approval of application is that the family requesting support has already applied for, been approved for and accessed the Disability Facilities Grant (DFG) offered by UK County Councils for making disability adaptations to a home.

Applying for a DFG is a detailed process and upon approval by the relevant local authority is sufficient qualification for applying for financial assistance and support from Sullivan's Heroes.

Qualification for support from Sullivan's Heroes is also obtained through communications with NHS Occupational Therapy and medical teams, community nursing teams and with a requirement of a written report or letter of referral from such organisations for application to the charity.

Sullivan's Heroes also requires detailed quotations from suppliers for the building works for approval of application for support, together with details of the DFG funding and any additional funding awarded from the local authority.

The monies Sullivan's Heroes raises through various fundraising activities are continually monitored to ensure a sufficient number of families with disabled children can be supported through the awarding of grants.

The website platform has the capacity to assist all families who successfully apply, by enabling them to conduct their own fundraising through the web platform should they choose to.

As agreed by the Board of Trustees and authorised by the Charity Commission as being in the interests of the charity to do so, Fiona Smith has been employed as Operations Manager of Sullivan's Heroes since 18/05/2020 whilst retaining her position as Trustee of the charity, as one of the co-founders.

A Conflicts of Interest Policy has been established together with a Register of Interests and will be adhered to by all trustees accordingly.

Summary of the main achievements of the charity during the year

The trustees report the number of applicants has remained the same as in the previous year, with 21 applicants in this financial year.

Building costs continued to rise compared to previous years, impacting the adaptation projects and significantly affecting the families supported by Sullivans Heroes. Proposals from contractors faced lengthy delays, likely due to cost fluctuations, as councils sought alternative quotes.

Events and fundraising for families remained slower than previous years. General concerns about the cost of living may have made people more reticent about asking for money through fundraising, so less families seemed willing to fundraise through JustGiving. In reality, the general public were still happy to donate to those families who were fundraising, but families seem more hesitant to ask for donations with the challenging financial climate during this period.

Families have required significant support due to building cost increases over the previous years, increasing the costs for many of the projects undertaken, whilst the local authority grant funding has remained static with no increase in the amounts awarded to the projects.

Some external charities previously used for sourcing funding have closed or have exhausted their available funding, whilst others are still able to help on an ad-hoc basis. Many are oversubscribed for support periodically, leading to some rejections, or the organisations are temporarily closed to applications for a set period of time.

Some organisations revised their eligibility criteria around the funding use on a regular basis to maximise their audience of applicants they can support, requiring strict adherence to specific funding use criteria. Some support was still available for ad-hoc applications through these avenues where the funding use meets the eligibility criteria.

During the period from 1st November 2022 to 31st October 2023, the charity received 21 applications from families with disabled children. All 21 applicants were placed on a waitlist for a Grant, to be pledged closer to the start of their building projects from unrestricted funds available.

A total of 10 grants were paid to applicant's families during this period for projects underway or nearing completion.

Due to the length of time the majority of projects take to get underway and completed, only 2 of these grants were to applicants who applied within the same year timeframe of 1st November 2022 to 31st October 2023.

7 of these grants were paid to applicants who applied during the previous financial year of 1st November 2021 to 31st October 2022. 1 of the grants was paid to an applicant who applied to the charity in the year time period ending 31st October 2020. These projects to which the grants have been paid out are now completed, many of which are featured in the completed projects area of the charity's website at: <https://www.sullivansheroes.org/who-we-are-helping/who-weve-helped/>

10 of the 21 applicant's families are fundraising through the Sullivan's Heroes website to raise additional funds towards their home adaptations, representing a slight decrease on the previous year – with 47% of the families signed up with the charity engaging in fundraising with the charity's support, compared to 57% in the prior year. This decline might be attributed to the cost-of-living fears of families, making them less inclined to actively fundraise in the financial climate.

The charity has provided all the families with fundraising support and information to enable them to reach their targets, and actively sought additional funding to successfully fund and complete their projects.

The charity has also provided information to 52 additional families in this financial year, and their relevant Social Workers, Occupational Therapists and other support workers, relating to home adaptations and accessing council grant funding where appropriate.

Applications have been received direct from families and through referrals from medical, council, social services and housing agency professionals, plus referrals via other charitable organisations. Many families are also being referred to the charity via previous families supported by Sullivan's Heroes, and their relevant Occupational Therapists.

Sullivan's Heroes has sourced further funding towards the applicants' home adaptations through charitable organisations. The charity has enabled the full funds required for the projects to be reached.

Without Sullivan's Heroes support to secure this funding and aid the fundraising these projects would not be able to proceed, and the beneficiaries' home disability adaptations would not be put in place to meet their care and health requirements.

Completed projects can be viewed on the charity's website at: <https://www.sullivansheroes.org/who-we-are-helping/who-weve-helped/> with photos of the completed adaptations provided by the family, together with information from the family about the impact and differences the adaptations have made for their child.

Some families have also provided information for full case studies which are available on the website at: <https://www.sullivansheroes.org/about-us/resources/#case-studies>, detailing how the fundraising was carried out, and the benefits the charity has brought them throughout their fundraising and adaptations process.

Brief statement of the charity's policy on reserves

Sullivan's Heroes operates a Reserves Policy to maintain a Financial Reserves Fund to provide financial stability for operational costs and future grant allocations for the proceeding 12 months.

At the financial year end of 31/10/23 there is a Financial Reserves Fund in place of £60,570.

Sullivan's Heroes' policies ensure that all monies raised for its supported families are reserved within restricted funds.

Details of any funds materially in deficit

There are no funds materially in deficit.

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

The charity's main principal sources of funds are from donations either made to the charity as a whole or as restricted funds direct to a specific child whom the charity is supporting.

Funds have also been raised from events which either the charity attends, or external sources participate in on the charity's behalf. Individual families and their friends, family and colleagues have undertaken multiple challenges and events towards their target over the course of their fundraising. Although the cost-of-living concerns experienced during this year's timeframe has reduced the number of individual families fundraising publicly, families have still been successful in obtaining donations from the general public where they have proceeded with fundraising activities.

Direct donations from corporates and other charitable organisations decreased by 19% compared with the previous year, whilst JustGiving donations decreased 25% year on year.

The overall income of the charity has decreased by 28% to £197,092 in this financial year, compared with £273,685 in the previous year. Total expenditure decreased by 67%, from the previous year, including Grants and funds paid to applicants, with £132,466 expenditure compared with £399,630 in the previous financial year. The comparatively decreased expenditure is a result of the previous year's increased expenditure year on year, due to lengthy projects held up over preceding years through building supply issues reaching completion point and subsequent payment of funds raised.

The charity continues to operate in an entirely online presence. Charity expenditure is kept to a minimum. Salary paid to Fiona Smith for employment as Operations Manager as of 18/05/20 has been intentionally kept to a minimum level comparable to similar roles. Other expenditure is to cover running costs for the website, events, office software and third-party fees associated with online fundraising portals.

Section F

Other optional information

The Trustees of Sullivan's Heroes are pleased with the achievements of the charity over the course of the year. The number of charity applicants has remained static year on year, and the families supported during this period have required and received the additional support from the charity to meet their requirements for their adaptation projects.

Whilst the overall funds raised this financial year has reduced year on year, the grants and funds awarded to these beneficiaries has remained consistent with the charity's objectives, and the charity has successfully continued to support every eligible applicant to the charity.

As awareness of the charity continues to grow the Trustees look forward to supporting an increased number of beneficiaries in the future.

As with previous years' reporting, it continues to be encouraging to see the number of medical, council and housing agency professionals who know of the charity and are directing their clients to apply to the charity; together with other charitable organisations referring families to apply to the charity.

The benefits which the adaptation projects bring to the children who the charity is supporting are reported and documented on the charity's website once the projects are completed.

These website articles all contain wording, quotes, photos and videos supplied by the families supported, with full permission for usage, compiled from Feedback Forms provided to each family on completion of their project. The articles offer valuable insight and understanding into the impact each project has brought to the child, and highlighting the life-changing differences and benefits achieved by the home adaptations.

These articles and case studies can be found at:

Who we've helped: <https://www.sullivansheroes.org/who-we-are-helping/who-weve-helped/>

Case Studies: <https://www.sullivansheroes.org/about-us/resources/#case-studies>

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Fiona Smith	Helen Broderick
Position (eg Secretary, Chair, etc)	Secretary	Chair
Date	22/08/2024	



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

SULLIVAN'S HEROES

**On accounts for the year
ended**

31/10/2023

**Charity no
(if any)**

1163021

Set out on pages

Report of the Trustees and Financial Statements: Pages 1-4
Receipts and Payments Accounts (Form CC16a): Pages 1-2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/10/2023.

**Responsibilities and basis
of report**

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

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

**Independent
examiner's statement**

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

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

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

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

Signed:

Date:

20th August 2024

Name:

Pippa Forde

**Relevant professional
qualification(s) or body
(if any):**

AAT Level 3
IAB

Address:

8 Dean House Gate

Allerton

Bradford BD15 8HF

REPORT OF THE TRUSTEES AND UNAUDITED FINANCIAL STATEMENTS

FOR THE PERIOD ENDED 31 OCTOBER 2023

FOR

SULLIVAN'S HEROES

Richard Smith, Treasurer
Sullivan's Heroes
74 Selsfield Road
Turners Hill
West Sussex
RH10 4PW

SULLIVAN'S HEROES

CHARITY INFORMATION

FOR THE PERIOD ENDED 31 OCTOBER 2023

TRUSTEES:

Mr Richard Smith
Mrs Fiona Smith
Mrs Lia Lunn
Mrs Helen Broderick
Ms Amanda Cooper

REGISTERED OFFICE:

74 Selsfield Road
Turners Hill
Crawley
RH10 4PW

CHARITY REGISTRATION NUMBER:

1163021

SULLIVAN'S HEROES
STATEMENT OF FINANCIAL
ACTIVITIES
FOR THE PERIOD ENDED 31 OCTOBER 2023

	2023	2022
INCOMING RESOURCES		
Bank Interest Earned	1,014	95
Easy Fundraising	146	285
Ebay	0	0
Fund Raising Events	0	0
Gift Aid received	16,137	20,068
Gifts and Donations Income	170,197	217,258
Grants	2,503	34,667
Sales	7,096	1,312
	197,092	273,685
COSTS OF INCOMING RESOURCES		
Events	0	0
Just Giving Fees	2,277	3,064
Other charges/Fees	20	5
Grants Pledged by SH	2,503	34,667
	4,801	37,735
OPERATING COSTS		
Accounting fees	412	278
Bank Charges	136	34
Fundraising Equipment	10	0
IT Costs	5,291	4,996
Office Expense	18	23
Phone costs	277	257
Platform fees from Just Giving	562	562
Postage and Delivery	160	204
Salaries and Wages	17,165	17,185
Pension	328	328
	24,357	23,867
GRANTS AND PAYMENTS TO FAMILIES		
Funds paid to families	89,557	319,526
Grants paid to families	13,751	18,500
	103,308	338,026
NET INCOMING RECOURCES	64,626	-125,944
RESERVES BROUGHT FORWARD	155,908	281,852
RESERVES CARRIED FORWARD	220,534	155,908
REPRESENTED BY		
Main bank account	£68,274	58,211
Business Reserve account	£148,369	98,056
Uncleared Bank Deposit	£4,250	
Less Creditors A/C Payable	-£360	-359
Cash at Bank	220,534	155,908

FUNDS

Unrestricted Funds

General Funds	11,774	8,646
Financial Reserve funds	60,570	48,000

Restricted Funds

Allocated monies for Families	148,190	99,262
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Total Funds	<u>220,534</u>	<u>155,908</u>
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These financial statements are a true reflection of the financial position of the charity for the period ended 31 October 2023.
The financial statements were approved by the Board of Trustees on22/08/2024..... and were signed on its behalf by:



22/08/2024

.....

Mrs Fiona Smith – Trustee

.....

Date



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name	No (if any)
Sullivan's Heroes	1163021

CC16a

Receipts and payments accounts

For the period from	Period start date	To	Period end date
	01/11/2022		31/10/2023

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 £
A1 Receipts					
Supported Families	-	152,543	-	152,543	240,950
	-	-	-	-	-
Sullivan's Heroes General Fund	44,549	-	-	44,549	32,735
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	44,549	152,543	-	197,092	273,685
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	44,549	152,543	-	197,092	273,685
A3 Payments					
Payments to supported Families	-	103,615	-	103,615	338,696
	-	-	-	-	-
Sullivan's Heroes General Fund	28,852	-	-	28,852	60,934
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	28,852	103,615	-	132,466	399,630
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	28,852	103,615	-	132,466	399,630
Net of receipts/(payments)	15,697	48,928	-	64,626	- 125,945
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	56,646	99,262	-	155,908	281,853
Cash funds this year end	72,343	148,190	-	220,534	155,908

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 £
B1 Cash funds		72,343	148,190	-
		-	-	-
		-	-	-
	Total cash funds	72,343	148,190	-
(agree balances with receipts and payments account(s))				
		OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets				
B4 Assets retained for the charity's own use				
B5 Liabilities				

	Signature	Print Name	Date of approval
Signed by one or two trustees on behalf of all the trustees		F. SMITH	22/08/24