

THE FORMBY BEFRIENDING SCHEME

England & Wales - Charity number 1171771

Details

Other names	FROMBY PROJECT BEFRIENDING SCHEME
Status	Registered
Legal form	CIO
Registered	2017-02-24
Register	View on the Charity Commission register

Contact

Address	Formby Methodist Church 4 Elbow Lane Formby Liverpool L37 4AF
Phone	07437479417
Email	info@formbybefriendingscheme.org.uk
Website	http://formbybefriendingscheme.org.uk

Activities

Objects: TO RELIEVE THE NEEDS AND SOCIAL ISOLATION OF ELDERLY PEOPLE RESIDENT IN THE FORMBY, HIGHTOWN AND INCE BLUNDELL AREAS OF SEFTON, MERSEYSIDE BY PROVIDING A BEFRIENDING SERVICE

Activities: Aims to relieve the needs and social isolation of elderly people living in Formby, Hightown and Ince Blundell areas of Sefton, Merseyside by offering companionship and support. A volunteer visits an elderly person regularly for a chat or to enjoy activities which are agreed jointly. A coffee club is also held monthly for a larger group..

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, Disability
- **Who:** Elderly/old People

Geography

- Sefton

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£2,817	£17,960	-	-
2024-03-31	£10,468	£17,021	-	-
2023-03-31	£17,934	£16,333	-	-
2022-03-31	£16,519	£15,543	-	-
2021-03-31	£14,889	£13,174	-	-

Trustees

Name	Role	Appointed
Dr GERARD CORCORAN	Chair	2017-02-24
ALASTAIR GILLIES		2018-03-13
Dr Dympna Edwards		2020-01-14
IRENE WATTS		2017-02-24

THE FORMBY BEFRIENDING SCHEME

England & Wales - Charity number 1171771

Accounts

The Formby Befriending Scheme

Charity No. 1171771

Annual Report

for year ended 31st March 2025

Introduction

The Trustees present their Report along with Financial Statements. The Scheme was awarded independent charitable status on the 24th February 2017 having operated originally since 2013.

Governance

Trustees during the year ended 31st March 2025:

Dr G Corcoran Chair
Dr D Edwards
Mr A Gillies
Mrs I Watts

Trustees are appointed as and when necessary from members of the local community who have an interest in furthering the aims of the Charity.

The Charity operates as a Charitable Incorporated Organisation (CIO) registered with the Charity Commission in February 2017. The policies of the Charity are decided by the Trustees within guidelines of this organisation. The Trustees meet on a monthly basis, with invited others operating as a Steering Group.

The Trustees confirm that in exercising their powers and duties, they have complied with their responsibility to have due regard to the guidance on public health benefit published by the Charity Commission.

Registered Office

Methodist Church, Elbow Lane, Formby, Merseyside. L37 4AF

Objectives and Activities

Formby Befriending Scheme aims to reduce loneliness and social isolation among older adults who are resident in the Formby, Hightown and Ince Blundell areas of Sefton in Merseyside.

At the heart of the charity is a group of Volunteers or 'Befrienders' who visit people on a one-to-one basis each week for a chat and to provide companionship. Referrals are received from a variety of sources, often health related eg GP Surgeries, Social Prescribers as well as from individuals and their families.

There are two Coffee Clubs held each month which are free and open to those wanting to meet new people or socialise with others in a welcoming environment. The Coffee Clubs are supported by a team of Volunteers and transport is provided for anyone who is unable to make their own way.

New volunteers initially contact our part-time Scheme Coordinator and are then asked to complete an application form, provide references and undergo a DBS Check. Volunteer Befrienders are then “matched” with a person to visit at home on a regular basis. Other volunteers help with transport, catering and conversation at our regular coffee clubs.

During this year, a new initiative of Telephone Befriending has been added to our scheme, whereby volunteers have regular telephone contact with a number of ‘friends’ rather than home visits.

Meetings for all volunteers are arranged at least twice per year to review the progress of the Scheme and to share experiences. An update and discussion about Safeguarding Policy is also included at the meetings.

The Trustees are very grateful to the Scheme Coordinator and to all the Volunteers for their ongoing commitment to supporting older people in their local community.

Holiday at Home

The Trustees are grateful to the small team that has re-established Holiday at Home. This took place again in August 2024 and included a programme of events for older adults who are no longer able to enjoy the holidays they once had. As in previous years there was a very busy fortnight of activities, musical entertainment and fun and it was very pleasing to see so many people enjoying themselves..

Our sincere thanks go to Formby Benevolent Trust for funding support and all the organisations, businesses, churches and volunteers who worked so hard to make the fortnight so successful.

Financial Summary

Accounts have been prepared on an accrual basis.

The Charity is dependent on donations and fundraising to support operations and activities and the Trustees are grateful to all who have supported the Charity in this way. The Scheme will need to seek further grant funding and donations over the next year to continue its work.

As at 31st March 2025, the Charity finances report a net asset worth of £13,950 which will pay for most of our regular activities of the year ahead including staff costs to support the assessment of referrals, management of Coffee Clubs and overall coordination of the Scheme.

Gerard Corcoran
Chair of Trustees / Treasurer

Formby Befriending Scheme

Charity Registration 1171771

1/4/24 - 31/3/25

INCOME & EXPENDITURE	Unrestricted £	Restricted £	Total £
<u>INCOME</u>			
Donations	870	1500	2370
Bank Interest	447	0	447
Total Income	1317	1500	2817
<u>EXPENDITURE</u>			
Staff Costs	12195	350	12545
Publicity	0	467	467
Computing	1104	0	1104
Insurance	481	0	481
Activities & Events	0	605	605
Office Costs	1841	0	1841
Telephones	311	0	311
Refreshments	606	0	606
Total Expenditure	16538	1422	17960
Net Income	-15302	78	-15143

Note: A total of £2058 is held within the Scheme's Bank A/Cs in respect of restricted projects and to be used strictly on these projects in the future. £1026 for Holiday at Home, and £1031.75 for Dementia Support.

31st March 2025

BALANCE SHEET

	£
Bank A/C - Current	894
bank A/C - Savings	12247
Interest	
Petty Cash	
Prepayments	817
Accruals	- 38
Net Assets	13950
Income Surplus b/f	29093
Income Deficit Current Year	<u>-15143</u>
Net Funds	13950

Chair/Treasurer

Gerard Corrigan

THE FORMBY BEFRIENDING SCHEME

England & Wales - Charity number 1171771

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The Formby Befriending Scheme

Charity No. 1171771

Annual Report

for year ended 31st March 2024

Introduction

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Governance

Trustees during the year ended 31st March 2024:

Dr G Corcoran	Chair
Dr D Edwards	
Mr A Gillies	
Mrs I Watts	
Mr M Pickering	Resigned 6th January 2024

Trustees are appointed as and when necessary from members of the local community who have an interest in furthering the aims of the Charity.

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The Trustees confirm that in exercising their powers and duties, they have complied with their responsibility to have due regard to the guidance on public health benefit published by the Charity Commission.

Registered Office

Methodist Church, Elbow Lane, Formby, Merseyside. L37 4AF

Objectives and Activities

Formby Befriending Scheme aims to reduce loneliness and social isolation among older adults who are resident in the Formby, Hightown and Ince Blundell areas of Sefton in Merseyside.

At the heart of the charity is a group of Volunteers or 'Befrienders' who visit people on a one-to-one basis each week for a chat and to provide companionship. Referrals are received from a variety of sources, often health related eg GP Surgeries, Social Prescribers as well as from individuals and their families.

There are two Coffee Clubs held each month which are free and open to those wanting to meet new people or socialise with others in a welcoming environment. The Coffee Clubs are supported by a team of Volunteers and transport is provided for anyone who is unable to make their own way.

Plans to expand our support to people living with dementia which were postponed during the Pandemic as well as our usual information and training sessions for Volunteers have still to be delivered.

Overall, the Trustees are pleased with how the Charity has been able to resume its regular activities to almost pre-pandemic levels during the past year. They are grateful to the part-time paid Scheme Coordinator and to all the Volunteers for their ongoing commitment to supporting older people in their local community.

Holiday at Home

The Trustees are grateful to the small team that has re-established Holiday at Home after the pandemic. This took place in August 2023 and included a programme of events for older adults who are no longer able to enjoy the holidays they once had. Three hundred individual people attended the events amounting to a cumulative total of around 1000. It was a very busy fortnight of activities, musical entertainment and fun and it was very pleasing to see so many new friendships were made and old friendships renewed.

Our sincere thanks go to Sefton CVS and the Barchester Charitable Foundation for funding support and all the organisations, businesses, churches and volunteers who worked so hard to make the fortnight so successful.

Financial Summary

Accounts have been prepared on an accrual basis.

The Charity is dependent on grants, donations and fundraising to support operations and activities and the Trustees are grateful to all who have supported the Charity in this way.

As at 31st March 2024, the Charity finances report a net asset worth of £29,093 of which £2,439 is restricted and specifically applies to the Holiday at Home, Information Sessions and Dementia Support projects. The unrestricted funds will pay for regular activities of the year ahead including staff costs to support the assessment of referrals, management of Coffee Clubs and overall coordination of the Scheme.

Gerard Corcoran

Chair of Trustees / Treasurer

Formby Befriending Scheme

Charity Registration 1171771

1/4/23 - 31/3/24

INCOME & EXPENDITURE	Unrestricted £	Restricted £	Total £
<u>INCOME</u>			
Grants	3882	0	3882
Donations inc Gift Aid	5790	660	6450
Bank Interest	136	0	136
Total Income	9808	660	10468
<u>EXPENDITURE</u>			
Staff Costs	9699	818	10517
Training	132	0	132
Publicity	0	441	441
Computing	591	0	591
Insurance	752	0	752
Activities & Events	0	619	619
Office Costs	619	230	849
Consumables	49	94	143
Telephones	572	0	572
Refreshments	923	0	923
Travel & Subsistence	47	211	258
Volunteer Expenses	571	653	1224
Total Expenditure	13955	3066	17021
Net Income	-4147	-2406	- 6553

Note: A total of £2439.19 is held within the Scheme's Bank A/Cs in respect of restricted projects and to be used strictly on these projects in the future. £1047.84 for Holiday at Home, £359.60 for Information Sessions and £1031.75 for Dementia Support.

BALANCE SHEET	31st March 2024 £
Bank A/C - Current	655
bank A/C - Savings	27,500
Interest	241
Petty Cash	41
Prepayments	755
Accruals	- 58
Net Assets	29,093
Income Surplus b/f	35,646
Income Deficit Current Year	<u>-6,553</u>
Net Funds	29,093

Chair / Treasurer

Gerard Corran

THE FORMBY BEFRIENDING SCHEME

England & Wales - Charity number 1171771

Accounts

The Formby Befriending Scheme

Charity No. 1171771

Annual Report

for year ended 31st March 2023

Introduction

The Trustees present their Report along with Financial Statements. The Scheme was awarded independent charitable status on the 24th February 2017 having operated originally since 2013.

Governance

Trustees during the year ended 31st March 2023:

Mr A Gillies Chair

Mrs A Long Inactive due to ill health

Mrs I Watts

Dr G Corcoran

Mr M Pickering

Dr D Edwards

Trustees are appointed as and when necessary from members of the local community who have an interest in furthering the aims of the Charity.

The Charity operates as a Charitable Incorporated Organisation (CIO) registered with the Charity Commission in February 2017. The policies of the Charity are decided by the Trustees within guidelines of this organisation. The Trustees meet on a monthly basis, with invited others operating as a Steering Group.

The Trustees confirm that in exercising their powers and duties, they have complied with their responsibility to have due regard to the guidance on public health benefit published by the Charity Commission.

Registered Office

Methodist Church, Elbow Lane, Formby, Merseyside. L37 4AF

Objectives and Activities

Formby Befriending Scheme aims to reduce loneliness and social isolation among older adults who are resident in the Formby, Hightown and Ince Blundell areas of Sefton in Merseyside.

At the heart of the charity is a group of Volunteers or 'Befrienders' who visit people on a one-to-one basis each week for a chat and to provide companionship. Referrals are received from a variety of sources, often health related eg Stroke Association, GP Surgeries as well as from individuals and their families.

There are two Coffee Clubs held each month which are free and open to those wanting to meet to meet new people or socialise with others in a welcoming environment. The Coffee Clubs are supported by a team of Volunteers and transport is provided for anyone who is unable to make their own way.

Plans to expand our support to people living with dementia which were postponed during the Pandemic as well as our usual information and training sessions for Volunteers have still to be delivered.

Overall, the Trustees are pleased with how the Charity has been able to resume its regular activities to pre-pandemic levels during the past year. They are grateful to the 3 part-time paid staff and to all the Volunteers for their ongoing commitment to supporting older people in their local community.

Holiday at Home

The Trustees are grateful to the small team that re-established Holiday at Home. This took place for the first time since 2019 from the 15th-26 August 2022 and included a programme of events for older adults who are no longer able to enjoy the holidays they once had. The events included musical entertainment, afternoon tea, a movie afternoon and chair-based exercises.

Our sincere thanks go to all community groups, businesses and individuals who offered to host an event. Special thanks go to the Green Hall Foundation who provided funding for the programmes, transport and other associated costs.

Financial Summary

Accounts have been prepared on an accrual basis.

The Charity is dependent on grants, donations and fundraising to support operations and activities and the Trustees are grateful to all who have supported the Charity in this way.

As at 31st March 2023, the Charity finances report a net asset worth of £35,646 of which £4,847 is restricted and specifically applies to the Holiday at Home, Information Sessions and Dementia Support projects. The unrestricted funds will pay for activities of the year ahead including staff costs to support the assessment of referrals, management of Coffee Clubs and overall coordination of the Scheme.

FORMBY BEFRIENDING SCHEME

Charity Registration 1171771

Year ended 31st March 2023

INCOME & EXPENDITURE	2023			2022
	Unrestricted £	Restricted £	Total £	Total £
INCOME				
Grants	10,650	2,250	12,900	8,982
Donations inc Gift Aid	4,935	0	4,935	6,738
Govt Job Retention Scheme	0	0	0	589
Fundraising	99	0	99	210
Total Income	15,684	2,250	17,934	16,519
EXPENDITURE				
Staff Costs	9,543	1,441	10,984	10,965
Training	228	0	228	290
Publicity	0	844	844	1
Computing	281	100	381	825
Insurances	422	0	422	424
Activities & Events	0	719	719	0
Office Costs	780	200	980	842
Consumables	205	0	205	47
Telephones	464	0	464	429
Pandemic Support Gifts	0	0	0	1,006
Refreshments	553	116	669	220
Travel & Subsistence	20	417	437	62
Volunteer Expenses	0	0	0	92
Bank Charges	0	0	0	36
Miscellaneous	0	0	0	304
Total Expenditure	12,496	3,837	16,333	15,543
Net Income	3,188	-1,587	1,601	976

Note: A total of £4,847 is held within the Scheme's Bank A/C in respect of restricted projects and to be used strictly on these projects in the future. £2,615 for Holiday at Home, £360 for the Information Sessions, and £1,872 for the Dementia Support.

BALANCE SHEET	31st March 2023	31st March 202
	£	£
Bank A/C	34,682	33,149
Petty Cash	135	153
Prepayments	829	747
Accounts Payable	0	-4
Accruals	0	0
Net Assets	35,646	34,045
Income Surplus b/f	34,045	33,069
Income Surplus current year	1,601	976
Net Funds	35,646	34,045

Accounts agreed and approved on behalf of the Trustees

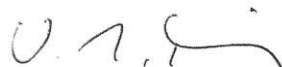
13/6/23

Trustees

Mr G Corcoran Chairman



Mr M Pickering Treasurer



Examiner

Mr R Dodd



Independent Examiner's Report to the Trustees of Formby Befriending Scheme for the year ended 31st March 2023

I report on the Accounts of the Charity for the above period which have been prepared on a Receipts and Payments basis and which are set out on the Income & Expenditure and Balance Sheet page.

Respective responsibilities of the 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 under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- 1 examine the Accounts under section 145 of the 2011 Act.
- 2 follow the procedures laid down in the general directions given by the Charity Commission under section 145(5)(b)
- 3 state whether particular matters have come to my attention.

Basis of independent examiner's report

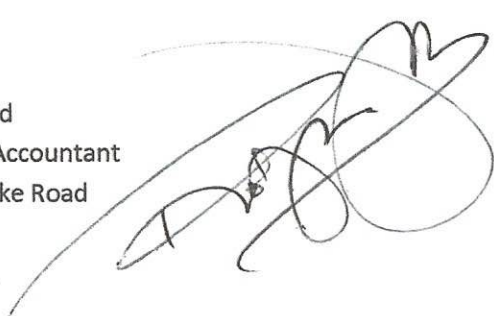
My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts prepared with those records. It also includes consideration of any unusual items or 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 they present a 'true and fair view' and the report is limited to those matters set out in the statement 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 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave 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.

Rob Dodd
Retired Accountant
63 Kirklake Road
Formby
L37 2DA



Date 26 May 2023

THE FORMBY BEFRIENDING SCHEME

England & Wales - Charity number 1171771

Accounts



The Formby Befriending Scheme

Charity No. 1171771

Annual Report

for year ended 31st March 2022

Introduction

The Trustees present their Report along with Financial Statements. The Scheme was awarded independent charitable status on the 24th February 2017 having operated originally since November 2013.

Governance

Trustees during the year ended 31st March 2022:

Mr A Gillies Chair

Mrs A Long Inactive due to ill health

Mrs I Watts

Dr G Corcoran

Mr M Pickering

Dr D Edwards

Trustees are appointed, as and when necessary, from members of the local community who have an interest in furthering the aims of the Charity.

The Charity operates as a Charitable Incorporated Organisation (CIO) registered with the Charity Commission in February 2017. The policies of the Charity are decided by the Trustees within the guidelines of this organisation. They meet on a monthly basis, with selected others, operating as a managing Steering Group.

The Trustees confirm that, in exercising their powers and duties, they have complied with their responsibility to have due regard to the guidance on public benefit published by the Charity Commission.

Registered Office

Methodist Church, Elbow Lane, Formby, Merseyside. L37 4AF

Objectives & Activities

Formby Befriending Scheme aims to reduce loneliness and social isolation among older adults who are resident in the Formby, Hightown and Ince Blundell areas of Sefton, Merseyside.

At the heart of the Charity is a group of Volunteers or 'Befrienders' who visit people on a one-to-one basis each week to chat and provide companionship. Referrals are received from a variety of sources, often health-related e.g. Stroke Association, GP Surgeries, as well as from individuals and their families. During the last year visits gradually returned to normal with a reduced reliance on telephone calls needed during the height of the Pandemic.

The two Coffee Clubs, held each month, also fully returned to normal by the end of the year after continued disruption in 2021. These are free and are open to those wanting to meet new people or socialise with others in a safe and welcoming environment. Transport is provided for anyone who is unable to make their own way and it is supported by a team of volunteers who do their best to ensure everyone feels welcome and included. Occasional small group outings and activity groups have also been arranged. These further develop friendships and relationships, encourage signposting to other social groups and encourage people to be more involved in their community.

Both the annual Holiday at Home event, normally held in August, and further Information & Awareness Sessions again had to be postponed, after also being cancelled in 2020.

Also postponed were plans to expand support for people living with dementia particularly those who have been referred to the Scheme for befriending support. In early 2020, plans were being made to recruit volunteers to specifically provide transport to local activities and events on a weekly basis, help people be socially more active and be more involved in their local community.

Overall, the Covid19 lockdown and social restrictions again had a major impact on the Scheme's activities, causing further disruption to befriending activities. Other additional ways of social engagement were continued, particularly in the 2021 calendar year, to help maintain befriending support including regular telephone contact, virtual Zoom Coffee clubs, a monthly newsletter, periodic gifts and greetings cards, virtual volunteer forums and virtual trustee meetings. These all helped to boost morale and wellbeing, reduce social isolation and enable the Scheme to operate and function as normally as possible

In the year ended 31st March 2022 Formby Befriending Scheme was supported by an average of 48 volunteers and 3 part-time paid staff. The Government flexible furlough scheme was used for 1 person. Volunteers included Befrienders, Drivers, Coffee Club helpers, IT support and Trustees.

Future Plans

Normal activities were fully restarted by March 2022 and this included the two Coffee Clubs. As part of our support for those living with dementia, a third Coffee Club is planned to start in May 2022 which will be activity based and dementia friendly and, additionally, we also plan re-commence transport to other local groups when they restart. Staffing resources are being reviewed to establish how best to manage, provide and co-ordinate our various activities

The next 2 week Holiday at Home event will be in August 2022 and funding from the Green Hall Foundation has been carried over from 2020. They support the improvement of lives among the sick, elderly, disabled and disadvantaged.

The Information & Awareness sessions will be completed when feasible, but probably not until 2023.

Health & Safety guidelines will continue to be reviewed in accordance with Government guidelines relating to the Covid19 Pandemic. We aim to maintain as safe an environment as possible.

Overall, the Trustees are pleased how the Charity has evolved and developed over the last 5 years since registration. They are particularly grateful to all the Volunteers for their ongoing commitment and dedication and look forward to continuing to support older people in the local community.

Financial Summary

Accounts have been prepared on an Accruals basis.

The Charity is dependent on grants, donations and fundraising to support operations and activities. The Trustees are very grateful to all who have supported the Charity in this way; this includes the Co-op, Sefton CVS, the Community Link Foundation and the Marsh Christian Trust. Their thanks also go to all those who gave personal donations and organised, and participated in, fundraising events particularly our cyclists in the Land's End to John O'Groats cycling tour, and our two runners in the London Marathon.

Income and expenditure had both recovered to almost normal levels following the worst of the Pandemic. Income levels were again helped by receipts from the Government Furlough Scheme.

As at 31st March 2021 the Charity finances report a net asset worth of £34,045 of which £6,434 is restricted and specifically applies to the Holiday at Home, Information Sessions, Dementia Support projects. The unrestricted funding will pay for activities for the year ahead and beyond, including staff costs to support the professional assessment of referrals, management of the Coffee Clubs, and day to day liaison and co-ordination of the Scheme. Overall, the current ongoing annual budget of the Charity is £15,000 per annum, although this is expected to rise when planned projects recommence.

Trustees of The Formby Befriending Scheme

FORMBY BEFRIENDING SCHEME

Charity Registration 1171771

Year ended 31st March 2022

INCOME & EXPENDITURE	2022			2021
	Unrestricted £	Restricted £	Total £	Total £
INCOME				
Grants	8,982	0	8,982	8,330
Donations inc Gift Aid	6,738	0	6,738	3,779
Govt Job Retention Scheme	589	0	589	2,780
Fundraising	210	0	210	0
Total Income	16,519	0	16,519	14,889
EXPENDITURE				
Staff Costs	10,764	201	10,965	8,827
Training	290	0	290	0
Publicity	1	0	1	0
Computing	768	57	825	355
Insurances	424	0	424	408
Activities & Events	0	0	0	0
Office Costs	842	0	842	560
Consumables	47	0	47	0
Telephones	429	0	429	583
Pandemic Support Gifts	1,006	0	1,006	2,013
Refreshments	220	0	220	0
Travel & Subsistence	62	0	62	0
Volunteer Expenses	92	0	92	409
Bank Charges	36	0	36	19
Miscellaneous	304	0	304	0
Total Expenditure	15,285	258	15,543	13,174
Net Income	1,234	-258	976	1,715

Note: A total of £6,434 is held within the Scheme's Bank A/C in respect of restricted projects and to be used strictly on these projects in the future. £4,074 for Holiday at Home, £360 for the Information Sessions, and £2,000 for Dementia Support.

BALANCE SHEET	31st March 2022	31st March 2021
	£	£
Bank A/C	33,149	31,656
Petty Cash	153	77
Prepayments	747	1,361
Accounts Payable	-4	0
Accruals	0	-25
Net Assets	34,045	33,069
Income Surplus b/f	33,069	31,354
Income Surplus current year	976	1,715
Net Funds	34,045	33,069

Accounts agreed and approved on behalf of the Trustees

Trustees

Mr A Gillies Chairman

Mr M Pickering Treasurer

Examiner

Mr R Dodd

29/6/2022

Independent Examiner's Report to the Trustees of Formby Befriending Scheme for the year ended 31st March 2022

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Respective responsibilities of the Trustees and Examiner

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It is my responsibility to:

- 1 examine the Accounts under section 145 of the 2011 Act.
- 2 follow the procedures laid down in the general directions given by the Charity Commission under section 145(5)(b)
- 3 state whether particular matters have come to my attention.

Basis of independent examiner's report

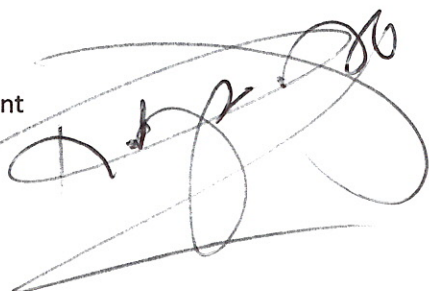
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Independent examiner's statement

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 130 of the 2011 Act; and
to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act
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.

Rob Dodd
Retired Accountant
63 Kirklake Road
Formby
L37 2DA



Date 29/6/2022

THE FORMBY BEFRIENDING SCHEME

England & Wales - Charity number 1171771

Accounts



The Formby Befriending Scheme

Charity No. 1171771

Annual Report

for year ended 31st March 2021

Introduction

The Trustees present their Report along with Financial Statements. The Scheme was awarded independent charitable status on the 24th February 2017 having operated originally since November 2013.

Governance

Trustees during the year ended 31st March 2021:

Mr A Gillies Chair

Mrs A Long Inactive due to ill health

Mrs I Watts

Dr G Corcoran

Mr M Pickering

Dr D Edwards

Trustees are appointed, as and when necessary, from members of the local community who have an interest in furthering the aims of the Charity.

The Charity operates as a Charitable Incorporated Organisation (CIO) registered with the Charity Commission in February 2017. The policies of the Charity are decided by the Trustees within the guidelines of this organisation. They meet on a monthly basis, with selected others, operating as a managing Steering Group.

The Trustees confirm that, in exercising their powers and duties, they have complied with their responsibility to have due regard to the guidance on public benefit published by the Charity Commission.

Registered Office

Methodist Church, Elbow Lane, Formby, Merseyside. L37 4AF

Objectives & Activities

Formby Befriending Scheme aims to reduce loneliness and social isolation among older adults who are resident in the Formby, Hightown and Ince Blundell areas of Sefton, Merseyside.

At the heart of the Charity is a group of Volunteers or 'Befrienders' who visit people on a one-to-one basis each week to chat and provide companionship. Referrals are received from a variety of sources, often health-related e.g. Stroke Association, GP Surgeries, as well as from individuals and their families. Due to the Covid19 lockdown in March 2020, face-to-face visits had to be stopped and replaced with regular telephone calls. Some garden visits were possible for a few weeks in 2020 and these were very much welcomed.

In normal times, two free Coffee Clubs are held each month which are open to those wanting to meet new people or socialise with others in a safe and welcoming environment. Transport is provided for anyone who is unable to make their own way and it is supported by a team of Volunteers who do their best to ensure everyone feels welcome and included. Occasional small group outings and activity groups have also been arranged. These further develop friendships and relationships and also encourage signposting to other social groups. All Coffee Clubs were suspended in March 2020 and have not yet recommenced. However, weekly Zoom meetings commenced late 2020 and the social engagement and conversation was appreciated by all participants.

Both the planned Holiday at Home event in August and further Information & Awareness Sessions had to be postponed.

Also postponed were plans to expand support for people living with dementia particularly those who have been referred to the Scheme for befriending support. In early 2020, plans were being made to recruit volunteers to specifically provide transport to local activities and events on a weekly basis, help people be socially more active and be more involved in their local community.

Overall, the Covid19 lockdown and social restrictions has had a major impact on the Scheme's activities, causing significant disruption to befriending activities. Other additional ways of social engagement were introduced to help maintain befriending support including regular telephone contact, virtual Zoom Coffee clubs, a monthly newsletter, periodic gifts and greetings cards, virtual volunteer forums and virtual trustee meetings. These all helped to boost morale and wellbeing, reduce social isolation and enable the Scheme to operate and function as normally as possible. Regular support with grocery shopping and prescription collections was also provided, including new people referred to the Scheme.

In the year ended 31st March 2021 Formby Befriending Scheme was supported by an average of 44 volunteers and 3 part-time paid staff. The Government flexible furlough scheme was used for 1 person. Volunteers included Befrienders, Drivers, Coffee Club helpers, IT support and Trustees.

Future Plans

Normal activities are planned to restart in July 2021 subject to confirmation of Government easing of social restrictions. Coffee clubs will, for 3 months, be invitation only with numbers attending limited to 15 which will help maintain as safe an environment as possible. Also Health & Safety guidelines and Risk Assessments will be completed.

Individual Risk Assessments will also be completed for all Befrienders as they begin again to commence weekly visits taking into account both their own individual circumstances and those of the Friend they visit.

The next 2 week Holiday at Home event is planned for August 2022 and funding from the Green Hall Foundation has been carried over from 2020. They support the improvement of lives among the sick, elderly, disabled and disadvantaged.

The Information & Awareness sessions will be completed when feasible.

Plans to improve support for people living with dementia will also recommence when feasible.

Overall, the Trustees are pleased how the Charity has evolved and developed in its first 4 years of registration. They are particularly grateful to all the Volunteers for their ongoing commitment and dedication and look forward to continuing to support older people in the local community.

Financial Summary

Accounts have been prepared on a Receipts & Payments basis.

The Charity is dependent on grants, donations and fundraising to support operations and activities. The Trustees are very grateful to all who have supported the Charity in this way; this includes the Allen Lane Foundation, Formby Rotary Club, Tesco, Waitrose, Co-op Bank and Sefton CVS. Their thanks also go to all those who gave personal donations and organised, and participated in, fundraising events including the Catherine Victoria Academy.

Income and expenditure were both about 30% below normal levels in 2020/21 due to Covid19 related social restrictions. Very limited fundraising has been possible in the last year. Income levels were helped by receipts from the Government Furlough Scheme.

As at 31st March 2021 the Charity finances report a net asset worth of £33,069 of which £6,692 is restricted and specifically applies to the Holiday at Home, Information Sessions, Dementia Support projects and also Covid19 related support. The unrestricted funding will pay for activities for the year ahead and beyond, including staff costs to support the professional assessment of referrals, management of the Coffee Clubs, and day to day liaison and co-ordination of the Scheme. Overall, the current ongoing annual budget of the Charity is £15,000 per annum, although this is expected to rise when planned projects recommence.

Trustees of The Formby Befriending Scheme

INCOME & EXPENDITURE			2021	2020
	Unrestricted	Restricted	Total	Total
	£	£	£	£
INCOME				
Grants	3,830	4,500	8,330	11,800
Donations inc Gift Aid	3,559	220	3,779	8,063
Govt Job Retention Scheme	2,780	0	2,780	0
Fundraising	0	0	0	968
Total Income	10,169	4,720	14,889	20,831
EXPENDITURE				
Staff Costs	7,976	851	8,827	11,796
Training	0	0	0	122
Publicity	0	0	0	1,011
Computing	240	115	355	240
Insurances	408	0	408	401
Activities & Events	0	0	0	260
Office Costs	77	483	560	400
Consumables	0	0	0	652
Pandemic Support Gifts	0	2,013	2,013	0
Telephones	583	0	583	486
Refreshments	0	0	0	1,211
Travel & Subsistence	0	0	0	505
Volunteer Expenses	409	0	409	312
Bank Charges	19	0	19	0
Total Expenditure	9,712	3,462	13,174	17,396
Net Income	457	1,258	1,715	3,435

Note: A total of £6,692 is held within the Scheme's Bank A/C in respect of restricted projects and is to be used strictly on these projects in the future. £4,074 for Holiday at Home, £360 for the Information Sessions, £2,000 for the Dementia Support Project, and £258 for Covid19 Support.

BALANCE SHEET	31st March 2021	31st March 2020
	£	£
Bank A/C	31,656	30,350
Petty Cash	77	105
Debtors & Prepayments	1,361	928
Accounts Payable	0	-29
Accruals	-25	0
Net Assets	33,069	31,354
Income Surplus b/f	31,354	27,919
Income Surplus current year	1,715	3,435
Net Funds	33,069	31,354

Accounts agreed and approved on behalf of the Trustees

Trustees

Mr A Gillies

Chairman



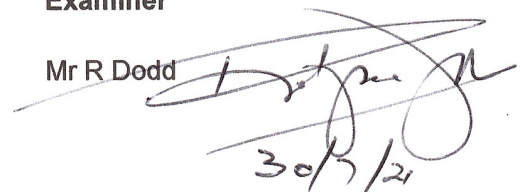
Mr M Pickering

Treasurer



Examiner

Mr R Dodd



30/3/21

Independent Examiner's Report to the Trustees of Formby Befriending Scheme for the year ended 31st March 2021

I report on the Accounts of the Charity for the above period which have been prepared on a Receipts and Payments basis and which are set out on the Income & Expenditure and Balance Sheet page.

Respective responsibilities of the 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 under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- 1 examine the Accounts under section 145 of the 2011 Act.
- 2 follow the procedures laid down in the general directions given by the Charity Commission under section 145(5)(b)
- 3 state whether particular matters have come to my attention.

Basis of independent examiner's report

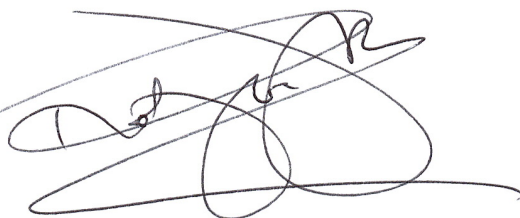
My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts prepared with those records. It also includes consideration of any unusual items or 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 they present a 'true and fair view' and the report is limited to those matters set out in the statement 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 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave 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.

Rob Dodd
Retired Accountant
63 Kirklake Road
Formby
L37 2DA



Date 30 July 2021