



# **The Formby Befriending Scheme**

*Charity No. 1171771*

## **Annual Report**

**for year ended 31<sup>st</sup> March 2021**

### **Introduction**

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

### **Governance**

Trustees during the year ended 31<sup>st</sup> 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 31<sup>st</sup> 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 31<sup>st</sup> 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

			2021	2020
	Unrestricted	Restricted	Total	Total
INCOME & EXPENDITURE	£	£	£	£
<b>INCOME</b>				
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
<b>Total Income</b>	<b>10,169</b>	<b>4,720</b>	<b>14,889</b>	<b>20,831</b>
<b>EXPENDITURE</b>				
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
<b>Total Expenditure</b>	<b>9,712</b>	<b>3,462</b>	<b>13,174</b>	<b>17,396</b>
<b>Net Income</b>	<b>457</b>	<b>1,258</b>	<b>1,715</b>	<b>3,435</b>

*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.*

	31st March 2021	31st March 202
BALANCE SHEET	£	£
Bank A/C	31,656	30,350
Petty Cash	77	105
Debtors & Prepayments	1,361	928
Accounts Payable	0	-29
Accruals	-25	0
<b>Net Assets</b>	<b>33,069</b>	<b>31,354</b>
Income Surplus b/f	31,354	27,919
Income Surplus current year	1,715	3,435
<b>Net Funds</b>	<b>33,069</b>	<b>31,354</b>

*Accounts agreed and approved on behalf of the Trustees*

#### Trustees

Mr A Gillies

Chairman



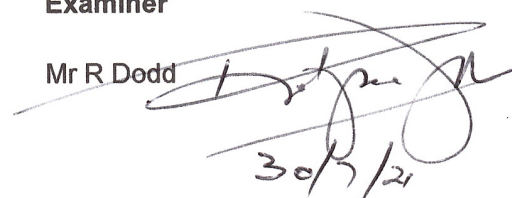
Mr M Pickering

Treasurer



#### Examiner

Mr R Dodd



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

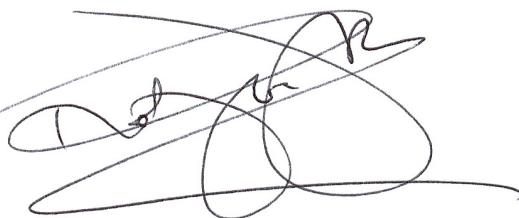
My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts prepared with those records. It also includes consideration of any unusual items or 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 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 30 July 2021