



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

	2022			2021
	Unrestricted	Restricted	Total	Total
INCOME & EXPENDITURE	£	£	£	£
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.

	31st March 2022	31st March 2021
BALANCE SHEET	£	£
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

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

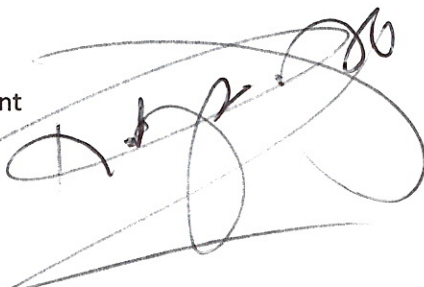
My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts prepared with those records. It also includes consideration of any unusual items or 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 29/6/2022