

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

	2023			2022
	Unrestricted	Restricted	Total	Total
	£	£	£	£
INCOME & EXPENDITURE				
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.

	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

G. Corcoran

M. Pickering

[Signature]

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

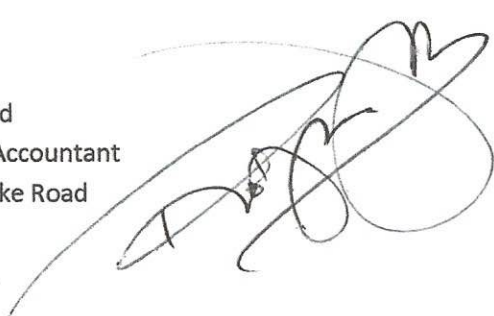
My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts prepared with those records. It also includes consideration of any unusual items or 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 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 26 May 2023