

# **The Formby Befriending Scheme**

Charity No. 1171771

## **Annual Report**

**for year ended 31st March 2024**

### **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 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.

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.

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

	Unrestricted	Restricted	Total
	£	£	£
<b>INCOME &amp; EXPENDITURE</b>			
<b><u>INCOME</u></b>			
Grants	3882	0	3882
Donations inc Gift Aid	5790	660	6450
Bank Interest	136	0	136
<b>Total Income</b>	<b>9808</b>	<b>660</b>	<b>10468</b>
<b><u>EXPENDITURE</u></b>			
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
<b>Total Expenditure</b>	<b>13955</b>	<b>3066</b>	<b>17021</b>

<b>Net Income</b>	<b>-4147</b>	<b>-2406</b>	<b>- 6553</b>
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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.

31st March 2024

## BALANCE SHEET

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

Chair / Treasurer

*Gerard Corran*