

Lake District Mobility



Annual Report 1st April 2021 – 31st March 2022

The Annual Report and Financial Statement of the Trustees of Lake District Mobility,
a charitable incorporated organisation.

A Charity registered with the Charities Commission in England and Wales.
Registered Charity no: 1172739.

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Trustees: Adrian Jones (Chair), Lorraine Smyth, and Nick Lancaster

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Letter from the Chairman, Adrian Jones

Through 2022 I have remained as Chair, Lorraine Smyth has done a fantastic job as Treasurer and Nick Lancaster completes our current Trustee Board bringing a wealth of experience which is of great benefit to the charity.

Lorraine and Nick's ongoing contributions and guidance are much appreciated. Julia, our Development Manager has done a great job driving the charity forward over the last few years, with Penny, our Fundraising Officer, and Trella, our Operations Officer, continuing to do an outstanding job in their respective roles. All their dedication and hard work has been greatly appreciated and has ensured the charity continues to deliver on our mission.

Julia has now left her role as Development Manager and we are delighted that Philip Wake is joining us in the role of Development Officer. Philip shares the values of the charity and brings a wide range of skills and experience to the post.

In the Lake District National Park we currently have operational hire sites at Whinlatter Forest, Grizedale Forest and the Langdale Estate. We are hoping that sites at Fell Foot, Sizergh Castle and the Calvert Trust will be joining them in 2023. In the North York Moors National Park we have operational hire sites at Sutton Bank, which has opened an additional route this year, Ravenscar, Dalby Forest and Cropton Forest.

To help manage the growing number of sites and bookings we have launched a new website this year with an online booking system. This is proving to be of benefit to our members and staff.

Despite challenging circumstances for all charities, Lake District Mobility continues its upwards trajectory, and I am confident that the depth and breadth of our services will continue to improve over the coming twelve months.

Adrian Jones

Making Amazing Places Accessible

Our Plan

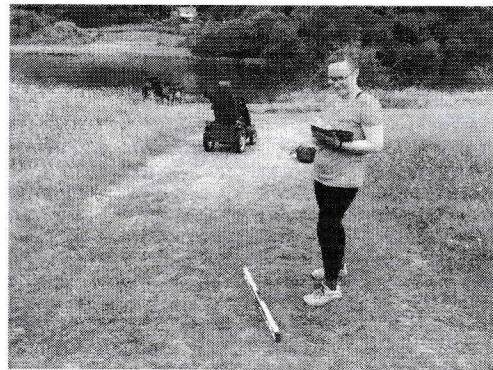
Lake District Mobility exists for the public benefit to break down the barriers that prevent people with limited mobility enjoying the great outdoors either independently or with their friends and family.

We achieve this by

- providing and leasing all-terrain mobility scooters, Trampers, at outdoor attractions and businesses
- helping to raise awareness of barriers to accessibility and advocate for better access for all

What we do

- Recruit hire sites to host Trampers
- Audit trails and advise on accessibility and safety
- Train and support hire sites to host and hire out Trampers
- Offer taster or annual memberships to people with limited mobility to allow them to hire out all our Trampers, wherever placed
- Publicise available hire sites
- Arrange the maintenance and servicing of Trampers
- Raise awareness of the barriers facing people with limited mobility
- Work with Accessible Cumbria
- Ensure all our staff are encouraged to fulfil their potential with training, flexible working and regular supervision and appraisal.
- Support the campaign for more Changing Places
- Champion radical improvements to accessibility by influencing key organisations such as Cumbria Tourism and the Lake District National Park Authority
- Work with our affiliate North York Moors Mobility to make Trampers available at sites in the North York Moors National Park.
- Raise funds to buy Trampers
- Provide insurance for all users



Our team

Julia Walker stepped down from her role as Charity Development Manager in the spring of 2022. The role of Charity Development Manager was reviewed, and the new role of Development Officer has been filled. Penny Swann and Trella Javanainen remain in their posts of Funding Officer and Operations Officer, respectively. The staff team enjoyed a team building day out on the fells in Grasmere in June 2021. They also benefited from safeguarding training in November.



Nick Lancaster joined the trustee team September, replacing Anna Scamans, one of the charity's original trustees, who stepped down in July. Nick brings with him a wealth of knowledge and experience gained from his years in hospitality management, including a long spell as the Managing Director of Langdale Leisure. Chris MacLeod stepped down from the trustee team in December 2021. Lorraine Smythe remains as our third trustee.

What our members say

Our regular feedback questionnaire asks our members what we could do to improve our scheme. The most frequent answer to this has been and continues to be that we make more places accessible with a Trampler.

We also ask what our members enjoyed about using the Trampler and the answers to this are always elated. Most often we hear about the freedom the Trampler has given the individual, the ability to enjoy an activity with family or friends without having to rely on someone else for support and being able to see views that had been inaccessible until then. Many of our respondents also comment on the positive impact on their mental health.

After leading an active life to not being able to walk in the country anymore with my husband was depressing. To be able to go out on a walk together again was uplifting and I've booked for Langdale next week. I look for holidays now where Trampler hire is available.

Made my year, never thought I could enjoy the outdoors again. No more being left in the cafe or seat.

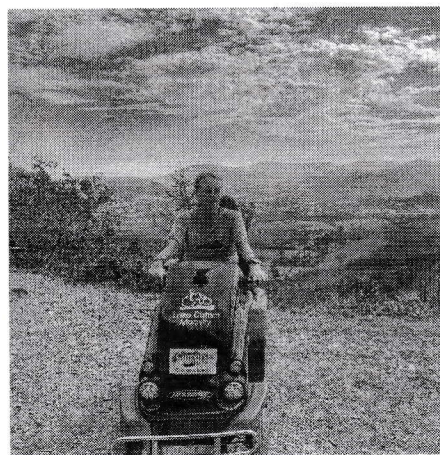
Great to see more of the forest environment and to spend time together with partner and dog. Normally I sit in a café and they go for a walk. Trampler helps me to socialise too. A great idea and facility.

The comfort and sense of safety in using the Trampler were also often mentioned.

I sat very secure. It was a tremendous liberation!

As the face-to-face representatives of the scheme, the staff members at hire sites are crucial to the members' Trampler experience.

I just wanted to say a big 'thank you' to the team at Whinlatter for the excellent help and instruction I received recently when I hired a Trampler, whilst on holiday in the Lake District. This was the first time I'd used anything like this, I'm normally a keen walker, but following my 3rd spinal surgery the Trampler enabled me to join in and enjoy the lovely scenery. I took out annual membership and hope to use it closer to home before my next trip to the Lakes.



Growing and developing the charity

As Covid restrictions were eased, visitors returned to the outdoors and businesses began opening their doors again, Lake District Mobility returned to work with plans in place to support the charity's growth.

With the objective of encouraging potential partners to join the scheme it was decided that new partners in Cumbria would be offered free assessments and a year's free lease. We are currently close to launching two new Trumper partner sites that have taken advantage of this offer.

Working with new partners

- **Grizedale Forest, Forestry England:**

Lake District Mobility carried out a trail and access assessment at Grizedale Forest in the summer of 2021, and a Trumper was swiftly launched there in the August of the same year. Grant funding from Barchester's Charitable Foundation, The Dowager Countess Eleanor Peel Trust, The Hadfield Trust and The Nineveh Charitable Trust enabled this to take place.

Before I ended up in a wheelchair me, my husband, and daughter did a lot of hill walking. This obviously stopped because my chair couldn't manage the steep hills etc. The Trumper has enabled me to become one of the family again.

Mrs B. Grizedale's first Trumper visitor



- **Fell Foot National Trust:** we also carried out an assessment of Fell Foot Park by the lake Windermere in the summer of 2021. The site is on course to benefit from extensive renovation and landscaping work, which is due to be completed in the spring/summer of 2023. One of the aims of the project is to make Fell Foot as accessible as possible. In the meanwhile, a temporary Tramper route was assessed, and a Tramper is now in situ, funded by Souter Charitable Trust, Tesco Community Grants and Cumbria County Council. The temporary route is due to be launched soon and, once the landscaping work is complete, a permanent Tramper route will be established.
- **Sizergh Castle National Trust:** we assessed the formal castle grounds for Tramper access in November 2021. The Tramper was delivered, and staff training took place early 2022. Launch of the Tramper has been on hold, whilst the team at Sizergh Castle has been working with National Trust's IT team to enable staff access to Lake District Mobility's new on-line booking system. The IT access has now been resolved and we anticipate that the Tramper can be launched imminently. The Tramper was funded by Roseland Trust Fund, Johnson Fund, Holehird Grants Community, Souter Charitable Trust and Dowager Countess Eleanor Peel Trust
- **Calvert Trust/Mirehouse:** we carried out an assessment in the spring of 2022, for a route from Calvert Trust Lake District by Bassenthwaite, through Dodd Wood and onto the grounds of Mirehouse. The route follows the public footpath to St Bega's church, before retracing back to Calvert Trust. The Tramper, named Wuky (after Julia's grandfather-in-law, Frank "Wuky" Walker) was generously gifted to Lake District Mobility by the Osprey Group. Work to make the site ready to launch the Tramper is currently being finalised.

Working with existing sites

- In March, Julia delivered staff training at Sutton Bank in March, as well as viewing the improvements made to the road crossing at A170, making safer and enabling the launch of a second Tramper route, the White Horse.
- Julia and Trella delivered staff training at Langdale in June.
- Whinlatter Forest gained a second Tramper in July 2021 to meet high demand on the site. At first Wuky, the Tramper gifted by Osprey Group, was made available there, until funding from Postcode Lottery enabled us to place a Tramper there on permanent basis.



Developing the charity

- We spent a sunny day in May with a photographer and a videographer and three of our members and their partners at Whinlatter Forest and Langdale Estate. We now have a good stock of professional photographs of our members enjoying the outdoors on Trampers with their loved ones. We also have several high-quality films, all of which we have been using on our website and in promotional materials and activities. This work was funded by a donation from Jacobs. Gemma Goulding, a Jacobs staff member, had been commended for her volunteer work in the community during Covid and had chosen Lake District Mobility as a beneficiary of a donation by Jacobs.



- Until November 2021 all membership details and details of Tramper use have been recorded on paper forms at hire sites and then processed manually by Lake District Mobility. This process had become increasingly time consuming, with more sites coming on board and more people using the service. Anticipating that Lake District Mobility will grow with an increasing number of members and more hire sites, a decision was taken to commission a new website. The website would replace the paper-based system and enable individuals to become members and book Trampers on-line, as well as provide hire sites real time information on their Tramper bookings. To this end, Lake District Mobility worked through the summer with the web designer, Becca Dunlop, on a new website with an on-line Tramper booking and membership management systems built in. The new website was launched in November 2021. All annual members were written to in advance advising them of the new system and offered support prior to being transferred on to the system. All relevant hire site staff members were also given training on the

new booking platform. After an initial period of getting used to the new system and making adjustments to the way it operates, it can be said that the new website has been a success. We continue to improve and develop elements of the website, however, it is clear that it has reduced administration for both staff at hire sites and at Lake District Mobility. The website platform also provides good tools for communication with membership and for analysing data gathered.

- Bedrock Basics, collaborating with Cumbria CVS and with funding from Sellafield Ltd, has been offering free support and activities aimed at transforming West Cumbria. Lake District Mobility accessed elements of this support in the winter of 2022. Penny attended fundraising strategy sessions and Trella met with Nicola Lynch, the National Lead on Civil Society for Social Value UK for coaching on how we can measure the social impact of our Trampler offering. Following the coaching from Nicola, we have improved the gathering of feedback from our members. This includes automatic request for feedback after each Trampler visit, made easier by the tools available on our website. We have also been conducting longer interviews with a smaller sample of our membership, giving us more in-depth understanding of how our members benefit from using the Trampers.

Making ourselves known

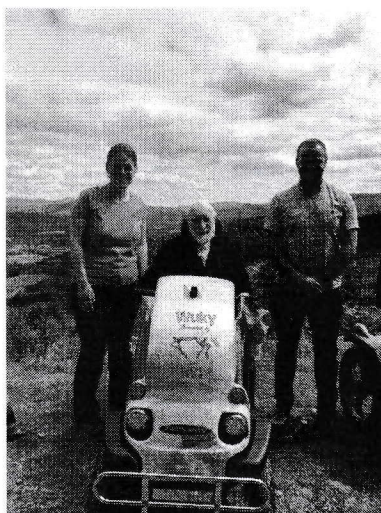
- Penny attended the Orrest Head accessible path launch near Windermere in September. It gave us an opportunity to connect with potential Trampler users, as well as strengthening our relationship with the Lake District National Park and other partners who work to make the Lake District accessible.
- Trella held a stall at a hospitality trade show organised by Cumbria Tourism in March. It gave us an opportunity to talk to venue owners about how our Trampler scheme could add enjoyment to their guests' and visitors' experiences.



Our supporters

Lake District Mobility continues to benefit from the support of individuals, businesses and charitable trusts and organisations. During the reporting period we were gifted a Trampler by the Osprey Group, which was initially put to good use at Whinlatter and will shortly start taking visitors out at Calvert Trust. We also received donations made in memory of Frank Walker, the grandfather-in-law of our founder, Julia, and an intrepid Trampler adventurer. We thank all our funders and supporters, including those who wish to remain anonymous, both for their one-off donations and their monthly gifts. Some of our funders include:

- Barchester Charitable Foundation £1,000
- Tesco £1,000
- Roseland Trust Fund £1,000
- Johnson Fund £2,000
- Holehird Grants Committee £2,000
- Hadfield Trust £2,500
- Souter Charitable trust £3,000
- Postcode Lottery £19,700
- Yapp Charitable Trust £3,000



Financial Statement

Receipts and Payments for the year ending 31st March 2022

	Unrestricted Funds	Restricted Funds	Total Funds	2021 Total
RECEIPTS	£	£	£	£
HMRS Job Retention Scheme	2,863		2,863	13,560
Grants	17,031	39,600	56,631	2,500
Donations & Legacies	3,350		3,350	25,032
Gift Aid	-		-	-
Site Assessments	-		-	-
Lease Agreements	-		-	3,972
Membership Fees	1,124		1,124	248
Interest	-		-	-
Travel reimbursement	-		-	221
Total Receipts	24,368	39,600	63,968	45,533
PAYMENTS				
Accountancy Costs	684		684	-
Advertising/Promotion	2,322		2,322	-
Assessment Costs	250		250	-
Bank Charges	96		96	69
Insurances	955		955	697
Memberships	353		353	147
Office Equipment and Expenses	805		805	277
Project Management	915		915	-
Partnership Agreements	198		198	39
Pay and Pensions	10,131	11,000	21,131	21,809
Printing, Postage & Stationery	1,156		1,156	353
Rent	2,200		2,200	1,050
Repairs	1,747		1,747	1,311
Staff Training	420		420	-
Sundry	75		75	40
Tramper Purchases	336	34,800	35,136	-
Travel expenses	1,243		1,243	484
Volunteer Expenses	19		19	-
Website Costs	2,735		2,735	770
Total Payments	26,640	45,800	72,440	27,046

Year-end summary to 31 March 2022	2022 Unrestricted Funds £	2022 Restricted Funds £	2022 Total Funds £	2021 Total Funds £
NET	-2,272	-6,200	-8,472	18,487
Cash Funds B/F	49,281	6,200	55,481	36,994
Cash Funds C/F	47,009	0	47,009	55,481

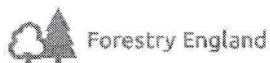
Statement of Assets and Liabilities

Assets	£
Trampers at cost	65,470
Office equipment at cost	1,967
Bank Account	47,009
Cheques in hand	211
Gift Aid	683
Total Assets	115,340
Liabilities	-



Aidie Jones
Chairman of trustees

30/1/2023



LANGDALE



Lake District
National Park



North York Moors
National Park



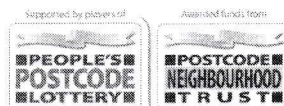
National
Trust



countryside mobility



County Council



Independent examiner's report to the trustees of Lake District Mobility

Charity number 1172739

I report to the trustees on my examination of the accounts of Lake District Mobility (the Charity) for the year ended 31 March 2022 set out on pages 12-13.

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act'). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

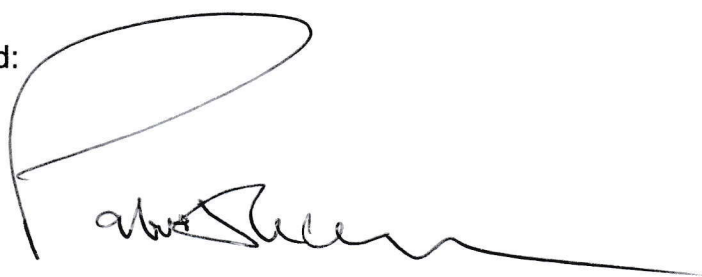
Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

A handwritten signature in black ink, appearing to read 'Patrick M Sharman', written over a large, loopy initial 'P'.

Patrick M Sharman

Chartered Accountant

Yew Tree House Pardshaw

Cockermouth CA13 0SP

Date 31 January 2023