CASS & FRIENDS

England & Wales · Charity number 1174703

Details

Status	Registered
Legal form	CIO
Registered	2017-09-18
Register	View on the Charity Commission register

Contact

Address	Digby Barn Laverton Broadway WR12 7NA
Phone	07776144728
Email	fiona@cassandfriends.org
Website	www.cassandfriends.org

Activities

Objects: TO RELIEVE NEED AND PROMOTE HEALTH FOR YOUNG PEOPLE BETWEEN THE AGES OF 12 AND 18 YEARS, LIVING IN GLOUCESTERSHIRE AND WORCESTERSHIRE, WHO CANNOT ADEQUATELY ACCESS AND PARTICIPATE IN SPORT THROUGH LACK OF FUNDING, BY PROVIDING THEM WITH GRANTS FOR THE ACQUISITION OF ESSENTIAL SPORTING EQUIPMENT AND COACHING AND TO PROVIDE THEM WITH MENTORING SUPPORT WHERE NECESSARY.

Activities: To relieve need and promote health for young people between the ages of 12 and 18 years, living in Gloucestershire and Worcestershire, who cannot adequately access and participate in sport through lack of funding, by providing them with financial support for associated costs and also delivering one-to-one mental fitness mentoring to help with the athlete's mental health and wellbeing.

Classification

- **How:** Makes Grants To Individuals, Provides Advocacy/advice/information
- **What:** Education/training, Disability, The Prevention Or Relief Of Poverty, Amateur Sport
- **Who:** Children/young People, People With Disabilities

Downloaded from opencharities.uk/ew/1174703

Geography

- Gloucestershire
- Worcestershire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-08-31	£42,215	£41,078	-	-
2024-08-31	£26,494	£34,757	-	-
2023-08-31	£31,086	£25,269	-	-
2022-08-31	£28,012	£17,833	-	-
2021-08-31	£10,525	£7,222	-	-

Trustees

Name	Role	Appointed
FIONA CARTER	Chair	2017-07-16
Deborah Helen Pratley Wright		2022-11-13
JONATHAN ANDREW EATON		2017-07-16
PROFESSOR DAVID JAMES		2021-11-23
Peter Mitchener		2025-12-28

Downloaded from opencharities.uk/ew/1174703

CASS & FRIENDS

England & Wales - Charity number 1174703

Accounts



2024/2025

TRUSTEES ANNUAL REPORT

CASS & FRIENDS

TABLE OF CONTENTS





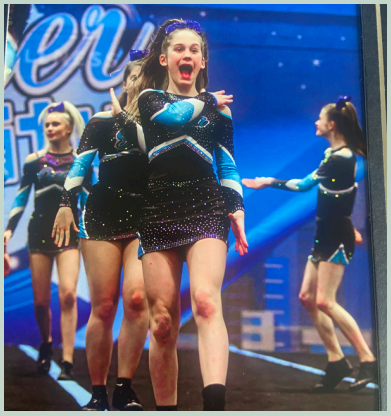
01.

Trustees' report

02.

2024/2025 Snapshot



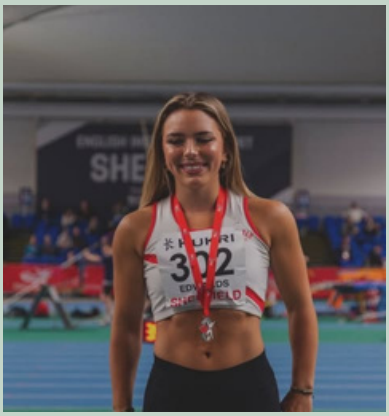


03.

The need we work to address

04.

Looking ahead





05.

Trustees, ambassador and patron comments

06.

Financial review

"I wanted to extend my greatest appreciation to CASS & Friends aiding my sporting journey as well as giving myself the opportunity to meet athletes from other sports. I would not be the athlete I am now if it was not for your help and support".



01. TRUSTEES' REPORT

What a tenth year we have had! Smashing our fundraising target, raising over £42,000 and continuing to work with the best local athletes in Gloucestershire and Worcestershire who need our help. We have given grants totalling £40,250. These athletes have continued to impress us with tenacity, determination, grit and fortitude in difficult financial situations and in some cases difficult family situations. We are so proud of them all and how hard they work to achieve their goals.

Our mentoring programme goes from strength to strength and is without doubt one of the best things about being a CASS & Friends supported athlete. Feedback on the programme is overwhelmingly positive with athletes and coaches all saying that it has increased our athletes' performance and helped boost their confidence.

The podcast is getting more traction and the interviewees love to share their stories. Our younger athletes are learning form our alumni athletes and they all inspire each other. Several more are heading to university in the USA having listened to one of our older athletes share her story of her scholarship and experience in America.

Our approach to diversity means that we have a number of para athletes and athletes from different ethnicities. Paradigm Norton financial planners continue to sponsor us and another huge thanks to The Notgrove Trust for believing in the work we do and continuing their support.

Lord Lieutenant Edward Gillespie has encouraged us to be nominated for the King's Award for Voluntary Services so this is a huge accolade in itself and shows what a wonderful voluntary organisation we are.

We continue our collaboration with SportsAid and Tim Henman's Performance Plus Sport charity. As a result, we have supported three athletes this year with disabilities and it has also lead us to do more mentoring with athletes outside our catchment area which is a super way to bring in additional fundraising.

Finally, and very sadly we want to pay our respects to Mike Deakin, who passed away in August. He was one of the founding trustees and the driving force in setting up CASS & Friends. He never failed to give up his time and energy to support us and our athletes and he will be dearly missed.

Fiona Carter, founder and trustee

"Thank you for all the support you have given me over the time we have known each other. It's made a big difference to me and I will never forget it."

02. 2024/2025 SNAPSHOT

65 £40,250 of financial support was given in over 65 transactions during the year for our athletes to buy new kit, equipment, pay for travel, accommodation, races and much more

26 26 athletes were supported including 6 runners, 3 rowers (one para rower), 3 taekwondo players, 2 tennis players, 2 cheerleaders, 2 tumblers, 1 boxer, 1 canoeist, 1 long jumper, 1 rugby player, 1 swimmer, 1 discus thrower, 1 para triathlete, 1 cyclist .

10 10 successful funding applications for grants. Grants were received from The Notgrove Trust, The Oakland Foundation, The Astor Foundation, Worcestershire County Council, Cheltenham Rotary Club, Gloucestershire Freemasons, The PF Charitable Trust, The Misses Barrie Trust, The Chipping Campden Rotary Club, The Winchcombe Rotary Club

12 12 podcasts were published on the Athletic Ambitions Podcast

8 8 athletes have gone through the performance mindset course

3 We continued to do our community three events including the Evesham 10k bake sale and we had two guest speakers, para Olympian Mel Nicholls and alumni athlete Henry James, to inspire the athletes and share knowledge and wisdom

1 One impact assessment survey was conducted to identify the need and impact of the work we do





03. THE NEED WE WORK TO ADDRESS

In our local area and indeed throughout the UK, there is little funding for children who are so good at their particular sport that they start competing all over the country (and internationally) if they are going to reach their full potential.

The costs can become prohibitive to some families since there is no prize money involved. The parents have to pay for coaching, kit, physiotherapy, travel expenses, and hotels and we didn't want some children to be at a financial disadvantage compared to their competitors with no financial constraints.

Many of our athletes are also from a rural location which prevents them from accessing gyms and other facilities in more built-up areas.

We truly believe that the skills learned in sports translate into everyday life skills and behaviours and we aim to help our athletes build on this by helping them develop their sporting mindset and encouraging them to eat a healthy and balanced diet to fuel their performance .

All the athletes we have worked with thank us for the financial help and the ongoing support and belief in them as athletes. This self-confidence is paramount to success and something we help our athletes develop.

"Thank you for everything you have done for me over the past two years, it means more than I can really put into words. It's clear that you really do care about all the CASS & Friends athletes and we see the hard work that you put in and we appreciate that a lot. Stay in touch."

04. LOOKING AHEAD

We have learnt over the past 10 years which fundraising events work well and what activities we do that the athletes appreciate. We intend to develop strong relationships with more partners and grow the impact of the charity over the coming years. Here's what we intend to do next year:

1

WORK WITH SPORTSAID AND OTHER PARTNERS

We partnered with SportsAid to support their Gloucestershire and Worcestershire athletes and we have also partnered with Performance Plus Sport, part of the Tim Henman Foundation.

2

SPONSORS AND FRIENDS OF CASS

Applying for grants is a great way to raise income but attracting another corporate sponsor and more people who donate on a regular basis would be a real boost to our bottom line.

3

INVEST IN OUR PUPIL PREMIUM ATHLETES

Giving each athlete grants amounting to £1500 over the course of the year and engaging those aged 15 and above in the 8 week sporting success mindset programme is a realistic target.

4

DEVELOP OUR ALUMNI NETWORK

An alumni network will be a valuable “add on” initiative. Helping our leavers with branding and sponsorship, advising on applying to US universities and coming back to share experience and knowledge.

5

WORK WITH COMMUNITY VOLUNTEERS

Working with East Glos Tennis Club and other local clubs has helped us raise our profile within the local community and exposed us to more volunteers.

6

ATHLETIC AMBITIONS PODCAST

Interviewing professional athletes and sports people on a regular basis as well as our alumni athletes to share advice and information to our community.

05. TRUSTEES, AMBASSADOR AND PATRON REVIEW



Patron Eddie the Eagle - "Being the patron of CASS & Friends means a lot to me because like the athletes supported, finance was in short supply for my family so I continued to work as plasterer and even slept in a disused Finnish hospital for a short time to save enough money to keep my Olympic dreams alive.
The other aspect of the charity that resonates with me is the 8 week sporting success mindset course that is available to all the athletes. I often say that my sport was 90% mental and 10% physical. The skills learnt during the programme are invaluable to this young generation of Olympic hopefuls".



Ambassador Nikki Bartlet - "It's a huge honour to be an Ambassador for CASS & Friends. I'm a former Cheltenham and Bournside pupil and raised in Cheltenham. The opportunity that CASS & Friends provides; a community of athletes and opportunities for growth on a physical and personal level is very special. It is a privilege to offer the athletes my advice and support so that this may help them become the best versions of themselves, give them longevity in their sport and the drive to grab every opportunity in life".



Trustee Fiona Carter - "I am absolutely passionate about this charity. I adore helping athletes with their mindset and giving them help with funding is so important too. Occasionally, I go to competitions where I feel like I am only racing against athletes who can afford to be there and this doesn't motivate me at all. If we can make a small difference to all our athletes and help them compete on a level playing field then that makes me very happy and helping with their nutrition and mindset is another area where we can really help them be more competitive".



Trustee Jonathan Eaton - "I am a keen golfer and we enjoy raising some funds at our annual golf day here in Broadway and sometimes have the pleasure of being beaten by the athletes we support! These children are all fabulous and work so hard; we are backing them 100% on their incredible journey. My role at CASS & Friends involves mentoring our Trustee Apprentices who are our alumni athletes and I really enjoy seeing them develop into young adults with much to give back to us".



Trustee David James - "It's a pleasure to be a Trustee for such an important and worthwhile charity supporting young athletes. Competitive sport is tough, but coupled with worries about financing, and it can result in young talent not being realised. Through our work, we provide a supportive environment for local athletes that goes well beyond the finance, helping them to develop skills that lead to sustainable and fulfilling careers in sport. As a former athlete, competing in three Junior World Championships, I am passionate about seeing talent realised regardless of differences in family resources".



Trustee Debs Wright - I am a huge advocate of CASS & Friends, and all that it does to support talented athletes who might otherwise struggle to afford the basics. Sport has taught me so much in life: leadership, resilience, emotions, decision making. The list is endless. I want to help other athletes explore who they are and understand their mindset so that they can get the best out of themselves.

06. FINANCIAL REVIEW

£ The charity had a net income of £42,215 compared to £26,494 last year

£ The charity received £22,200 of grants compared to £13,750 last year

£ The charity received £18,765 of donations compared to £12,194 last year

£ The charity gave £40,250 in financial support compared to £34,420 last year.

£ The charity had cash reserves of £27,101 at year end compared to £25,964 last year

£ The 4 trustees, Jonathan Eaton, David James, Debs Wright and Fiona Carter continue to work on a voluntary basis

£ Our expenses were just £328 which is in line with our target of keeping them to below 5% each year so that we can maximise grants given to our athletes.

This is the third Trustees' Annual Report and since gaining charity status in 2017 we have supported over 60 athletes and given grants amounting to approximately £180,000. For the two years prior to that we supported 4 athletes and between them they received grants in excess of £8,000.



Balance Sheet
From September 2023 to August 2024

	Prior Year		Year to Date	
Fixed Assets		0.00		0.00
Current Assets				
Bank Account	1,136.50		27,101.11	
		1,136.50		27,101.11
Current Liabilities				
		0.00		0.00
Current Assets less Current Liabilities		1,136.50		27,101.11
Total Assets less Current Liabilities		1,136.50		27,101.11
Long Term Liabilities				
		0.00		0.00
Total Assets less Total Liabilities		1,136.50		27,101.11
Capital & Reserves				
Funds	0.00		25,964.61	
P&L Account	1,136.50		1,136.50	
		1,136.50		27,101.11

Profit and Loss
From September 2023 to August 2024

	Period		Year to Date	
Income				
Donations Received	18,765.16		18,765.16	
Sponsorship	1,250.00		1,250.00	
Grants Received	22,200.00		22,200.00	
		42,215.16		42,215.16
Expenditure				
Grants Issued	40,250.00		40,250.00	
Cost of activities	500.00		500.00	
		40,750.00		40,750.00
Direct Expenses	0.00		00.00	
Gross Profit / (Loss)		1,465.16		1,465.16
Overheads				
Insurance	307.60		307.60	
Paypal Charges	19.05		19.05	
Sum Up Charges	2.01		2.01	
Net Profit / (Loss)		328.66		328.66
		1,136.50		1,136.50

CASS &FRIENDS



Paradigm Norton | for life

TIM HENMAN FOUNDATION

PERFORMANCE PLUS
MADE THROUGH SPORT

SportsAid

www.cassandfriends.org

Cass & Friends
Profit and Loss

From: Month 1, September 2024
To: Month 12, August 2025

Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Income				
Donations Received	18,765.16		18,765.16	
Grants Received	22,200.00		22,200.00	
Sponsorship	1,250.00		1,250.00	
		42,215.16		42,215.16
Expenditure				
Grants Issued	40,250.00		40,250.00	
Cost of Charitable Activities	500.00		500.00	
		40,750.00		40,750.00
Direct Expenses				
		0.00		0.00
Gross Profit/(Loss):		1,465.16		1,465.16
Overheads				
Insurance	307.60		307.60	
Paypal Charges	19.05		19.05	
Sum-up Charges	2.01		2.01	
		328.66		328.66
Net Profit/(Loss):		1,136.50		1,136.50

Cass & Friends
Balance Sheet

From: Month 1, September 2024
To: Month 12, August 2025
Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Fixed Assets				
		0.00		0.00
Current Assets				
Bank Accounts	1,136.50		27,101.11	
		1,136.50		27,101.11
Current Liabilities				
		0.00		0.00
Current Assets less Current Liabilities:		1,136.50		27,101.11
Total Assets less Current Liabilities:		1,136.50		27,101.11
Long Term Liabilities				
		0.00		0.00
Total Assets less Total Liabilities:		1,136.50		27,101.11
Capital & Reserves				
Funds	0.00		25,964.61	
P & L Account	1,136.50		1,136.50	
		1,136.50		27,101.11

CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees Cass & Friends

On accounts for the year ended 31/08/2025 **Charity no (if any)** 1174703

Set out on pages 1-2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/08/2024

Responsibilities and basis of report

As the charity's trustees, 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

[The charity's gross income did not exceed £250,000.

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

** Please delete the words in the brackets if they do not apply.*

Signed: GBishop **Date:** 15/01/2026

Name: Caroline Bishop

Relevant professional qualification(s) or body (if any): N/A

Address: Checketts Garden

Laverton,
Broadway, WR12 7NA

Section B Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.	

CASS & FRIENDS

England & Wales - Charity number 1174703

Accounts



2023/2024

TRUSTEES ANNUAL REPORT

CASS & FRIENDS

TABLE OF CONTENTS





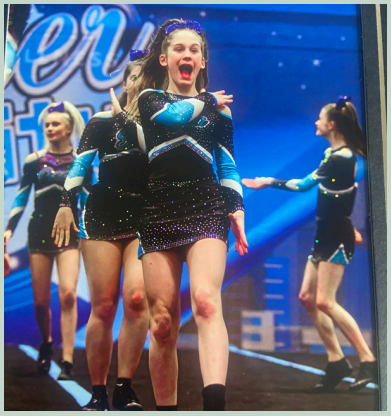
01.

Trustees' report

02.

2023/2024 Snapshot





03.

The need we work to address

04.

Looking ahead





05.

Trustees, ambassador and patron comments

06.

Financial review

"I wanted to extend my greatest appreciation to CASS & Friends aiding my sporting journey as well as giving myself the opportunity to meet athletes from other sports. I would not be the athlete I am now if it was not for your help and support".



01. TRUSTEES' REPORT

This is our 10th anniversary year and we are celebrating it with the word “Respect”; between the charity our athletes and our sponsors.

We became a charity in 2017 and at the start of this year were supporting 28 of the most hard-working and dedicated athletes in the Cotswolds; providing them with grants for their kit and equipment.

In addition to the funding we also supported our athletes on our 8-week Sporting Success Mindset Programme. Knowing the success of this programme last year we launched an online version of it and this provides us with additional income for the charity.

Paradigm Norton, a financial planning firm that helps their clients fulfill their real purpose and pursue their passions; both sentiments very much the ethos of CASS & Friends, kindly sponsored our “Olympic” art exhibition fundraiser. They will be our 2025 Corporate Sponsor.

Our collaboration with SportsAid continues and we have supported two of their athletes this year.

We continue to develop and build relationships with other groups and organisations and give external expertise and advice to our athletes. This year we focussed on strength and conditioning and the importance of breath work in sport, running two workshops to educate our athletes.

East Glos tennis club is an avid supporter and we did our first off-boarding session at the club with 8 athletes who are now alumni’s of CASS & Friends.

In addition to support our alumni athletes and continue to motivate our younger ones we have started a podcast called Athletic Ambitions. We interview our alumni athletes as well as professional athletes or people who have made a career in sport; all giving invaluable golden nuggets for our athletes to learn from.

Finally, we wanted to say a huge thank you to Diana Ackland at the Notgrove Trust for her invaluable financial support and confidence in us. We will make sure we use these funds wisely and they will make a significant difference to our athletes.

Fiona Carter, founder and trustee

“Thank you for all the support you have given me over the time we have known each other. It’s made a big difference to me and I will never forget it.”

02. 2023/2024 SNAPSHOT

70 £34,420 of financial support was given over 70 transactions during the year for our athletes to buy new kit, equipment, pay for travel, accommodation, races and much more.

29 29 athletes were supported including two boxers, two cyclists, seven runners, one swimmer, one taekwondo player, one hurdler, one pistol shooter, three rowers, three tennis players, three tumblers, two cheerleaders, two slalom kayakers, and one long jumper.

13 13 successful funding applications as a result of 70 letters, emails and grant applications submitted.

10 10 grants were received from Worcestershire County Council, Paradigm Trust, Notgrove Trust, Cheltenham Jockey CLub, HCOG, PF Charitable Trust, Winchcombe CC, Missess Barrie Trust, St James Place and Baron Devenport Trust

8 8 athletes have gone through the mindset course and the mindset course has generated £1,280

5 5 events were held this year; a pizza night, a bake sale at the Evesham 10k race and our fourth CASS community event where the athletes listened to a talk on the benefits of cold water therapy and breathing techniques. In addition we did our first off boarding session for the alumni athletes.

4 4 podcasts were published on the new Athletic Ambitions Podcast

3 3 athletes have gone to World or European Championships





03. THE NEED WE WORK TO ADDRESS

In our local area and indeed throughout the UK, there is little funding for children who are so good at their particular sport that they start competing all over the country (and internationally) if they are going to reach their full potential.

The costs can become prohibitive to some families since there is no prize money involved. The parents have to pay for coaching, kit, physiotherapy, travel expenses, and hotels and we didn't want some children to be at a financial disadvantage compared to their competitors with no financial constraints.

Many of our athletes are also from a rural location which prevents them from accessing gyms and other facilities in more built-up areas.

We truly believe that the skills learned in sports translate into everyday life skills and behaviours and we aim to help our athletes build on this by helping them develop their sporting mindset and encouraging them to eat a healthy and balanced diet to fuel their performance .

All the athletes we have worked with thank us for the financial help and the ongoing support and belief in them as athletes. This self-confidence is paramount to success and something we help our athletes develop.

"Thank you for everything you have done for me over the past two years, it means more than I can really put into words. It's clear that you really do care about all the CASS & Friends athletes and we see the hard work that you put in and we appreciate that a lot. Stay in touch."

04. LOOKING AHEAD

We have learnt over the past 10 years which fundraising events work well and what activities we do that the athletes appreciate. We intend to develop strong relationships with more partners and grow the impact of the charity over the coming years. Here's what we intend to do next year:

1

WORK WITH SPORTSAID AND OTHER PARTNERS

We partnered with SportsAid to support their Gloucestershire and Worcestershire athletes and will use this opportunity to develop a deeper relationship with them and other partners over the year.

2

SPONSORS AND FRIENDS OF CASS

Applying for grants is a great way to raise income but attracting another corporate sponsor and more people who donate on a regular basis would be a real boost to our bottom line.

3

INVEST IN OUR PUPIL PREMIUM ATHLETES

Giving each athlete grants amounting to £1500 or more over the course of the year and engaging those aged 15 and above in the 8 week sporting success mindset programme is a realistic target.

4

DEVELOP OUR ALUMNI NETWORK

An alumni network will be a valuable “add on” initiative. Helping our leavers with branding and sponsorship, advising on applying to US universities and coming back to share experience and knowledge.

5

COMMUNITY AWARENESS

Working with the schools of our athletes and the clubs that they attend is a great way to collaborate on fundraising activities and boost the awarenss of CASS & Friends.

6

ATHLETIC AMBITIONS PODCAST

Interviewing professional athletes and sports people on a regular basis as well as our alumni athletes to share advice and information to our community.

05. TRUSTEES, AMBASSADOR AND PATRON REVIEW



Patron Eddie the Eagle - "Being the patron of CASS & Friends means a lot to me because like the athletes supported, finance was in short supply for my family so I continued to work as plasterer and even slept in a disused Finnish hospital for a short time to save enough money to keep my Olympic dreams alive.
The other aspect of the charity that resonates with me is the 8 week sporting success mindset course that is available to all the athletes. I often say that my sport was 90% mental and 10% physical. The skills learnt during the programme are invaluable to this young generation of Olympic hopefuls".



Ambassador Nikki Bartlet - "It's a huge honour to be an Ambassador for CASS & Friends. I'm a former Cheltenham and Bournside pupil and raised in Cheltenham. The opportunity that CASS & Friends provides; a community of athletes and opportunities for growth on a physical and personal level is very special. It is a privilege to offer the athletes my advice and support so that this may help them become the best versions of themselves, give them longevity in their sport and the drive to grab every opportunity in life".



Trustee Fiona Carter - "I am absolutely passionate about this charity. I adore helping athletes with their mindset and giving them help with funding is so important too. Occasionally, I go to competitions where I feel like I am only racing against athletes who can afford to be there and this doesn't motivate me at all. If we can make a small difference to all our athletes and help them compete on a level playing field then that makes me very happy and helping with their nutrition and mindset is another area where we can really help them be more competitive".



Trustee Jonathan Eaton - "I am a keen golfer and we enjoy raising some funds at our annual golf day here in Broadway and sometimes have the pleasure of being beaten by the athletes we support! These children are all fabulous and work so hard; we are backing them 100% on their incredible journey. My role at CASS & Friends involves mentoring our Trustee Apprentices who are our alumni athletes and I really enjoy seeing them develop into young adults with much to give back to us".



Trustee David James - "It's a pleasure to be a Trustee for such an important and worthwhile charity supporting young athletes. Competitive sport is tough, but coupled with worries about financing, and it can result in young talent not being realised. Through our work, we provide a supportive environment for local athletes that goes well beyond the finance, helping them to develop skills that lead to sustainable and fulfilling careers in sport. As a former athlete, competing in three Junior World Championships, I am passionate about seeing talent realised regardless of differences in family resources".



Trustee Debs Wright - I am a huge advocate of CASS & Friends, and all that it does to support talented athletes who might otherwise struggle to afford the basics. Sport has taught me so much in life: leadership, resilience, emotions, decision making. The list is endless. I want to help other athletes explore who they are and understand their mindset so that they can get the best out of themselves.

06. FINANCIAL REVIEW

£ The charity had a net income of £26,494 compared to £31,086 last year

£ The charity received £13,750 of grants compared to £2,000 last year

£ The charity received £12,194 of donations compared to £17,811 last year

£ The charity gave £34,420 in financial support compared to £24,900 last year.

£ The charity had cash reserves of £25,964 at year end compared to £34,227 last year

£ The 4 trustees, Jonathan Eaton, David James, Debs Wright and Fiona Carter continue to work on a voluntary basis

£ Our expenses were just £337 which is in line with our target of keeping them to below 5% each year so that we can maximise grants given to our athletes.

This is the third Trustees' Annual Report and since gaining charity status in 2017 we have supported 51 athletes and given grants amounting to approximately £137,000. For the two years prior to that we supported 4 athletes and between them they received grants in excess of £8,000.



Balance Sheet
From September 2023 to August 2024

	Prior Year		Year to Date	
Fixed Assets		0.00		0.00
Current Assets				
Bank Account	8,262.92		25,964.61	
		8,262.92		25,964.61
Current Liabilities				
		0.00		0.00
Current Assets less Current Liabilities		8,262.92		25,964.61
Total Assets less Current Liabilities		8,262.92		25,964.61
Long Term Liabilities				
		0.00		0.00
Total Assets less Total Liabilities		8,262.92		25,964.61
Capital & Reserves				
Funds	0.00		34,227.53	
P&L Account	8,262.92		8,262.92	
		8,262.92		25,964.61

Profit and Loss
From September 2023 to August 2024

	Period	Year to Date
Income		
Donations Received	12,194.45	12,194.45
Ticket Revenue	550,00	550.00
Grants Received	13,750.00	1 3,750.00
	26,494.45	26,494.45
Expenditure	34.420.00	34,420.00
Grants Issued	34,420.00	34,420.00
Direct Expenses	0.00	00.00
Gross Profit / (Loss)	7,925.55	7,925.55
Overheads		
Insurance	307.60	307.60
Paypal Charges	20.91	20.91
Sum Up Charges	3.76	3.76
Stripe Charges.	5.10	5.10
Net Profit / (Loss)	337.37	337.37
	8,262.92	8,262.92

CASS &FRIENDS

SportsAid



TIM HENMAN FOUNDATION

PERFORMANCE PLUS
MADE THROUGH SPORT

Paradigm Norton | for life

www.cassandfriends.org

Date: 13/10/2024
Time: 19:04:59

Cass & Friends
Profit and Loss

From: Month 1, September 2023
To: Month 12, August 2024

Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Income				
Donations Received	12,194.45		12,194.45	
Ticket Revenue	550.00		550.00	
Grants Received - charitable activities	13,750.00		13,750.00	
		26,494.45		26,494.45
Expenditure				
Grants Issued	34,420.00		34,420.00	
		34,420.00		34,420.00
Direct Expenses		0.00		0.00
Gross Profit/(Loss):		(7,925.55)		(7,925.55)
Overheads				
Insurance	307.60		307.60	
Paypal Charges	20.91		20.91	
Sum-up Charges	3.76		3.76	
Stripe Charges	5.10		5.10	
		337.37		337.37
Net Profit/(Loss):		(8,262.92)		(8,262.92)

Cass & Friends
Balance Sheet

From: Month 1, September 2023
To: Month 12, August 2024

Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Fixed Assets		0.00		0.00
Current Assets				
Bank Accounts	(8,262.92)		25,964.61	
		(8,262.92)		25,964.61
Current Liabilities		0.00		0.00
Current Assets less Current Liabilities:		(8,262.92)		25,964.61
Total Assets less Current Liabilities:		(8,262.92)		25,964.61
Long Term Liabilities		0.00		0.00
Total Assets less Total Liabilities:		(8,262.92)		25,964.61
Capital & Reserves				
Funds	0.00		34,227.53	
P & L Account	(8,262.92)		(8,262.92)	
		(8,262.92)		25,964.61

CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees	Cass & Friends		
On accounts for the year ended	31/08/2024	**Charity no (if any)**	1174703
Set out on pages	1-2		

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/08/2024

Responsibilities and basis of report

As the charity's trustees, 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

~~[~~The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]~~]~~. *Delete* [ ] *if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (~~other than that disclosed below~~ *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

** Please delete the words in the brackets if they do not apply.*

Signed:	CBishop.	**Date:**	10/11/2024
Name:	Caroline Bishop		
Relevant professional qualification(s) or body	N/A		

CASS & FRIENDS

England & Wales - Charity number 1174703

Accounts



2022/2023

TRUSTEES ANNUAL REPORT

CASS & FRIENDS

TABLE OF CONTENTS



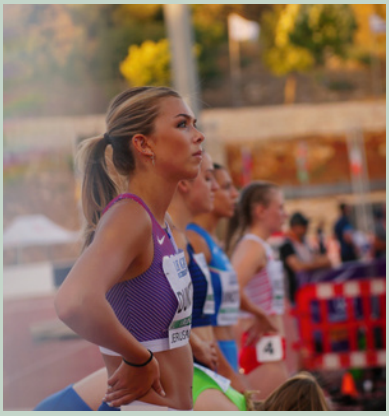


01.

Trustees' report

02.

2022/2023 Snapshot





03.

The need we work to address

04.

Looking ahead





05.

Trustees, ambassador and patron comments

06.

Financial review

"I wanted to extend my greatest appreciation to CASS & Friends aiding my sporting journey as well as giving myself the opportunity to meet athletes from other sports. I would not be the athlete I am now if it was not for your help and support".



01. TRUSTEES' REPORT

It is a pleasure to be writing this annual report and sharing the story of CASS & Friends and our exceptional athletes.

We became a charity in 2017 and at the start of this year were supporting 17 of the most hard working and dedicated athletes in the Cotswolds; providing them with grants for their kit and equipment. By the end of this year the number reached 28.

In addition to the funding we also supported our athletes on our 8 week Sporting Success Mindset Programme. Knowing the success of this programme this year we launched an online version of it and this provides us with additional income for the charity.

Debs Wright joined the board of trustees and comes with a wealth of knowledge and experience. She is a former Royal Airforce Group Captain and has a competitive sporting background; representing team GB at several age group triathlon European championships. We are delighted to have her join the team.

Emsea Ltd, a local precision engineering company agreed to be our corporate sponsor for the second year which gives us a fabulous boost to our finances.

Our collaboration with SportsAid continues and we have supported two of their athletes this year.

We continue to develop our relationship with performance nutritionists 4thdiscipline and this year we have done two sessions on Relative Energy Deficiency in Sport to help all of our athletes.

East Glos tennis club is an avid supporter and we have done several events hosted by the club to raise money for the charity and encourage all of our athletes to get together.

We continue to build our community through events for the athletes, their parents and our sponsors. These are attended by our fabulous patron Eddie the Eagle and our Ambassador, professional triathlete Nikki Bartlett.

Fiona Carter, founder and trustee

"Thank you for all the support you have given me over the time we have known each other. It's made a big difference to me and I will never forget it."

02. 2022/2023 SNAPSHOT

69 £24,940 was given during the year for our athletes in 69 transactions to buy new kit, equipment, pay for travel, accommodation, races and much more.

28 28 athletes were supported including two boxers, one skier, two cyclists, one hurdler, nine runners, one taekwondo player, one pistol shooter, one swimmer, two rowers, three tennis players, two tumblers, two cheerleaders and one long jumper.

12 12 athletes signed up for the online version of the mindset course and donated £300 as a result.

9 9 of our athletes have gone through the mindset course and the feedback has been overwhelmingly positive - "Thank you so much for your time and energy I have got so much out of every session I can't begin to tell you."

7 7 athletes have gone through the mindset course who are not athletes supported by CASS & Friends and these athletes have made donations to the charity in return for the course.

4 4 events were held this year; a golf day, a race night at East Glos tennis club, a bake sale at the Evesham 10k race and our third CASS community event where the athletes listened to a talk on nutrition and chatted with our Patron and Ambassador.

4 4 athletes reached World or European championships with several others reaching National / British championships.

2 2 webinars were delivered to the athletes; one on sports psychology and one on nutrition and the importance of correct fuelling.





03. THE NEED WE WORK TO ADDRESS

In our local area and indeed throughout the UK, there is little funding for children who are so good at their particular sport that they start competing all over the country (and internationally) if they are going to reach their full potential.

The costs can become prohibitive to some families since there is no prize money involved. The parents have to pay for coaching, kit, physiotherapy, travel expenses, and hotels and we didn't want some children to be at a financial disadvantage compared to their competitors with no financial constraints.

Many of our athletes are also from a rural location which prevents them from accessing gyms and other facilities in more built-up areas.

We truly believe that the skills learned in sports translate into everyday life skills and behaviours and we aim to help our athletes build on this by helping them develop their sporting mindset and encouraging them to eat a healthy and balanced diet to fuel their performance .

All the athletes we have worked with thank us for the financial help and the ongoing support and belief in them as athletes. This self-confidence is paramount to success and something we help our athletes develop.

"Thank you for everything you have done for me over the past two years, it means more than I can really put into words. It's clear that you really do care about all the CASS & Friends athletes and we see the hard work that you put in and we appreciate that a lot. Stay in touch."

04. LOOKING AHEAD

We have learnt over the past 5 years which fundraising events work well and what activities we do that the athletes appreciate. We intend to develop strong relationships with more partners and grow the impact of the charity over the coming years. Here's what we intend to do next year:

1

WORK WITH SPORTSAID

We partnered with SportsAid to support their Gloucestershire and Worcestershire athletes and will use this opportunity to develop a deeper relationship with them over the year.

2

SPONSORS AND FRIENDS OF CASS

Applying for grants is a great way to raise income but attracting another corporate sponsor and more people who donate on a regular basis would be a real boost to our bottom line.

3

INVEST IN OUR ATHLETES

Giving each athlete grants amounting to £1000 or more over the course of the year and engaging those aged 14 and above in the 8 week sporting success mindset programme is a realistic target.

4

DEVELOP OUR ALUMNI NETWORK

An alumni network will be a valuable “add on” initiative. Helping our leavers with branding and sponsorship, advising on applying to US universities and coming back to share experience and knowledge.

5

COMMUNITY AWARENESS

Working with the schools of our athletes and the clubs that they attend is a great way to collaborate on fundraising activities and boost the awarenss of CASS & Friends.

6

DEVELOP “ONBOARDING” PROCESS

Finding athletes in our local communities that “really can’t afford the basics” is our priority since this is the whole ethos of CASS & Friends.

05. TRUSTEES, AMBASSADOR AND PATRON REVIEW



Patron Eddie the Eagle - "Being the patron of CASS & Friends means a lot to me because like the athletes supported, finance was in short supply for my family so I continued to work as plasterer and even slept in a disused Finnish hospital for a short time to save enough money to keep my Olympic dreams alive.
The other aspect of the charity that resonates with me is the 8 week sporting success mindset course that is available to all the athletes. I often say that my sport was 90% mental and 10% physical. The skills learnt during the programme are invaluable to this young generation of Olympic hopefuls".



Ambassador Nikki Bartlet - "It's a huge honour to be an Ambassador for CASS & Friends. I'm a former Cheltenham and Bournside pupil and raised in Cheltenham. The opportunity that CASS & Friends provides; a community of athletes and opportunities for growth on a physical and personal level is very special. It is a privilege to offer the athletes my advice and support so that this may help them become the best versions of themselves, give them longevity in their sport and the drive to grab every opportunity in life".



Trustee Fiona Carter - "I am absolutely passionate about this charity. I adore helping athletes with their mindset and giving them help with funding is so important too. Occasionally, I go to competitions where I feel like I am only racing against athletes who can afford to be there and this doesn't motivate me at all. If we can make a small difference to all our athletes and help them compete on a level playing field then that makes me very happy and helping with their nutrition and mindset is another area where we can really help them be more competitive".



Trustee Jonathan Eaton - "I am so driven to help our local young athletes with their sporting journey and help them succeed with a little outside support from our grass roots charity that believes in their performance and potential. I am a keen golfer and we enjoy raising some funds at our annual golf day here in Broadway and sometimes have the pleasure of being beaten by the athletes we support! These children are all fabulous and work so hard; we are backing them 100% on their incredible journey".



Trustee David James - "It's a pleasure to be a Trustee for such an important and worthwhile charity supporting young athletes. Competitive sport is tough, but coupled with worries about financing, and it can result in young talent not being realised. Through our work, we provide a supportive environment for local athletes that goes well beyond the finance, helping them to develop skills that lead to sustainable and fulfilling careers in sport. As a former athlete, competing in three Junior World Championships, I am passionate about seeing talent realised regardless of differences in family resources".



Trustee Debs Wright - I am a huge advocate of CASS & Friends, and all that it does to support talented athletes who might otherwise struggle to afford the basics. Sport has taught me so much in life: leadership, resilience, emotions, decision making. The list is endless. I want to help other athletes explore who they are and understand their mindset so that they can get the best out of themselves.

06. FINANCIAL REVIEW

£ The charity had a net income of £31,086 compared to £28,012 last year

£ The charity received £2,000 of grants compared to £6,250 last year

£ The charity received £17,811 of donations compared to £16.636 last year

£ The charity received £10,000 in sponsorship compared to £5,000 last year

£ £24,900 of financial support was given during the year compared to £17,225 last year.

£ The charity had cash reserves of £34,227 at year end compared to £28,410 last year

£ The 4 trustees, Jonathan Eaton, David James, Debs Wright and Fiona Carter continue to work on a voluntary basis

£ Our expenses were 1.2% from 2% last year which is in line with our target of keeping them to below 5% each year so that we can maximise grants given to our athletes.

This is the third Trustees' Annual Report and since gaining charity status in 2017 we have supported 51 athletes and given grants amounting to approximately £102,540. For the two years prior to that we supported 4 athletes and between them they received grants in excess of £8,000.



CASS
&FRIENDS

emsea

SportsAid



www.cassandfriends.org

Cass & Friends
Balance Sheet

From: Month 1, September 2022
To: Month 12, August 2023

Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Fixed Assets				
		0.00		0.00
Current Assets				
Bank Accounts	5,816.63		34,227.53	
		5,816.63		34,227.53
Current Liabilities				
		0.00		0.00
Current Assets less Current Liabilities:		5,816.63		34,227.53
Total Assets less Current Liabilities:		5,816.63		34,227.53
Long Term Liabilities				
		0.00		0.00
Total Assets less Total Liabilities:		5,816.63		34,227.53
Capital & Reserves				
Funds	0.00		28,410.90	
P & L Account	5,816.63		5,816.63	
		5,816.63		34,227.53

Cass & Friends
Profit and Loss

From: Month 1, September 2022
To: Month 12, August 2023

Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Income				
Donations Received - donations	17,811.28		17,811.28	
Ticket Revenue - other trading activities	870.00		870.00	
Grants Received - charitable activities	2,000.00		2,000.00	
Sponsorship - other trading activities	10,000.00		10,000.00	
Gift Aid - other	405.25		405.25	
		31,086.53		31,086.53
Expenditure				
Grants Issued	24,900.00		24,900.00	
		24,900.00		24,900.00
Direct Expenses				
		0.00		0.00
Gross Profit/(Loss):		6,186.53		6,186.53
Overheads				
Insurance	318.80		318.80	
Paypal Charges	46.04		46.04	
Sum-up Charges	14.83		14.83	
Local Giving Fees	86.23		86.23	
Memberships and Subscriptions	(96.00)		(96.00)	
		369.90		369.90
Net Profit/(Loss):		5,816.63		5,816.63

CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees	Cass & Friends		
On accounts for the year ended	31.08.23	**Charity no (if any)**	1174703
Set out on pages			

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/08/2023.

Responsibilities and basis of report

As the charity's trustees, 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

[The charity's ~~gross~~ income ~~exceeded~~ £250,000 and I am qualified to undertake ~~the~~ examination by ~~being~~ a qualified member of [insert name of ~~applicable~~ listed body]]. *~~Delete~~* [ ] *if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (~~other than that disclosed below~~ *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

** Please delete the words in the brackets if they do not apply.*

Signed:	C Bishop.	**Date:**	25.10.23
Name:	Caroline Bishop		
Relevant professional qualification(s) or body (if any):	N/A		
Address:	CHECKERS GARDEN		

LAVERTON, BROADWAY
WR12 7NA.

Section B Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

CASS & FRIENDS

England & Wales - Charity number 1174703

Accounts

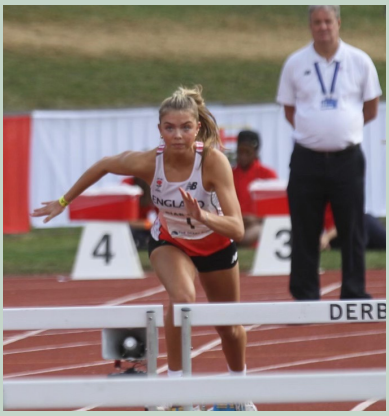


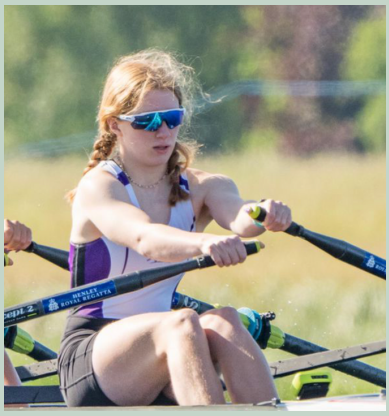
2021/2022

TRUSTEES ANNUAL REPORT

CASS & FRIENDS

TABLE OF CONTENTS





01.

Trustees' report

02.

2021/2022 Snapshot





03.

The need we work to address

04.

Looking ahead





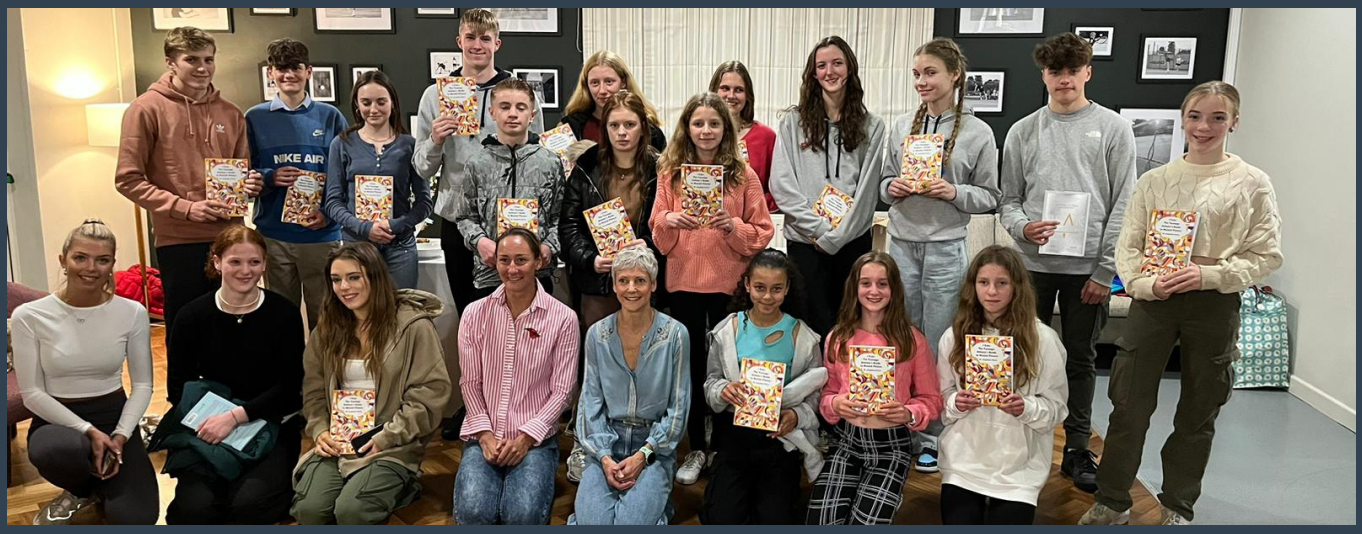
05.

Trustees, ambassador and patron comments

06.

Financial review

"I wanted to extend my greatest appreciation to CASS & Friends aiding my sporting journey as well as giving myself the opportunity to meet athletes from other sports. I would not be the athlete I am now if it was not for your help and support".



01. TRUSTEES' REPORT

It is a pleasure to be writing this annual report and sharing the story of CASS & Friends and our exceptional athletes.

We became a charity in 2017 and at the start of this year were supporting 19 of the most hard working and dedicated athletes in the Cotswolds; providing them with grants for their kit and equipment.

In addition to the funding we also supported our athletes on our 8 week Sporting Success Mindset Programme.

We were lucky enough to be nominated for the Queens Award for Voluntary Services; which is a huge accolade for a charity our size. Mike Deakin stepped down as trustee and became a "friend" of CASS & Friends and we were very fortunate that David James stepped seamlessly into his place.

Emsea Ltd, a local precision engineering company agreed to be our corporate sponsor and we are so delighted that we have been able to partner with them.

In the middle of the year we joined up with SportsAid and we gave the SportsAid nominated athletes based in Gloucestershire and Worcestershire their £1000 grant and access to our mindset course. We benefit from the credibility of being associated with such a well known and well established organisation.

Having worked with so many athletes over the course of the year we began to realise the importance of correct nutritional advice helping our athletes succeed; as a result we have partnered with 4thdiscipline and they give professional advice where necessary.

We continue to build our community through events for the athletes, their parents and our sponsors. These are attended by our fabulous patron Eddie the Eagle and our new Ambassador, professional triathlete Nikki Bartlett.

Fiona Carter, founder and trustee

"Thank you for all the support you have given me over the time we have known each other. It's made a big difference to me and I will never forget it."

02. 2021/2022 SNAPSHOT

49 49 grants totalling £17,225 were given during the year for our athletes to buy new kit, equipment, pay for travel, accommodation, races and much more.

19 19 athletes were supported including a cyclist, five runners, a triathlete, a skier, two boxers, a taekwondo player, a rugby player, a golfer, a swimmer, two rowers, a tennis player and a heptathlete,

7 7 of our athletes have gone through the mindset course and the feedback has been overwhelmingly positive - "Thank you so much for your time and energy I have got so much out of every session I can't begin to tell you."

5 5 athletes have gone through the mindset course who are not athletes supported by CASS & Friends and these athletes have made donations to the charity in return for the course.

4 4 events were held this year; a fundraising dinner, a golf day, a bake sale at the Evesham 10k race and our second CASS community event where the athletes played padel and shared experiences over pizza and drinks with our Patron Eddie the Eagle.

3 3 webinars were delivered to the athletes; 2 on nutrition and Olympian Adam Gemili gave his time in a one to one interview.

2 2 new team members - our Ambassador professional triathlete Nikki Barlett joined our team and David James as a trustee.

1 1 new corporate sponsor Emsea gave a huge donation of £5,000.





03. THE NEED WE WORK TO ADDRESS

In our local area and indeed throughout the UK, there is little funding for children who are so good at their particular sport that they start competing all over the country (and internationally) if they are going to reach their full potential.

The costs can become prohibitive to some families since there is no prize money involved. The parents have to pay for coaching, kit, physiotherapy, travel expenses, and hotels and we didn't want some children to be at a financial disadvantage compared to their competitors with no financial constraints.

Many of our athletes are also from a rural location which prevents them from accessing gyms and other facilities in more built-up areas.

We truly believe that the skills learned in sports translate into everyday life skills and behaviours and we aim to help our athletes build on this by helping them develop their sporting mindset.

All the athletes we have worked with thank us not only for the financial help but also for the ongoing support and belief in them as athletes. This self-confidence is paramount to success and something we help our athletes develop.

"Thank you for everything you have done for me over the past two years, it means more than I can really put into words. It's clear that you really do care about all the CASS & Friends athletes and we see the hard work that you put in and we appreciate that a lot. Stay in touch."

04. LOOKING AHEAD

We have learnt over the past 5 years which fundraising events work well and what activities we do that the athletes appreciate. We intend to develop strong relationships with more partners and grow the impact of the charity over the coming years. Here's what we intend to do next year:

1

WORK WITH SPORTSAID

We partnered with SportsAid to support their Gloucestershire and Worcestershire athletes and will use this opportunity to develop a deeper relationship with them over the year.

2

SPONSORS AND FRIENDS OF CASS

Applying for grants is a great way to raise income but attracting another corporate sponsor and more people who donate on a regular basis would be a real boost to our bottom line.

3

MINIMUM OF 20 FUNDED ATHLETES

Giving each athlete grants amounting to £1000 over the course of the year and engaging those aged 14 and above in the 8 week sporting success mindset programme is a realistic target.

4

DEVELOP OUR ALUMNI NETWORK

An alumni network will be a valuable “add on” initiative. Helping our leavers with branding and sponsorship, advising on applying to US universities and coming back to share experience and knowledge.

5

COMMUNITY AWARENESS

Working with the schools of our athletes and the clubs that they attend is a great way to collaborate on fundraising activities and boost the awarenss of CASS & Friends.

6

DEVELOP “ONBOARDING” PROCESS

Finding athletes in our local communities that “really can’t afford the basics” is our priority since this is the whole ethos of CASS & Friends.

05. TRUSTEES, AMBASSADOR AND PATRON REVIEW



Patron Eddie the Eagle - "Being the patron of CASS & Friends means a lot to me because like the athletes supported, finance was in short supply for my family so I continued to work as plasterer and even slept in a disused Finnish hospital for a short time to save enough money to keep my Olympic dreams alive. The other aspect of the charity that resonates with me is the 8 week sporting success mindset course that is available to all the athletes. I often say that my sport was 90% mental and 10% physical. The skills learnt during the programme are invaluable to this young generation of Olympic hopefuls".



Ambassador Nikki Bartlet - "It's a huge honour to be an Ambassador for CASS & Friends. I'm a former Cheltenham and Bournside pupil and raised in Cheltenham. The opportunity that CASS & Friends provides; a community of athletes and opportunities for growth on a physical and personal level is very special. It is a privilege to offer the athletes my advice and support so that this may help them become the best versions of themselves, give them longevity in their sport and the drive to grab every opportunity in life".



Trustee Fiona Carter - "I am absolutely passionate about this charity. I adore helping athletes with their mindset and giving them help with funding is so important too. Occasionally, I go to competitions where I feel like I am only racing against athletes who can afford to be there and this doesn't motivate me at all. If we can make a small difference to all our athletes and help them compete on a level playing field then that makes me very happy and helping with their nutrition and mindset is another area where we can really help them be more competitive".



Trustee Jonathan Eaton - "I am so driven to help our local young athletes with their sporting journey and help them succeed with a little outside support from our grass roots charity that believes in their performance and potential. I am a keen golfer and we enjoy raising some funds at our annual golf day here in Broadway and sometimes have the pleasure of being beaten by the athletes we support! These children are all fabulous and work so hard; we are backing them 100% on their incredible journey".



Trustee David James - "It's a pleasure to be a Trustee for such an important and worthwhile charity supporting young athletes. Competitive sport is tough, but coupled with worries about financing, and it can result in young talent not being realised. Through our work, we provide a supportive environment for local athletes that goes well beyond the finance, helping them to develop skills that lead to sustainable and fulfilling careers in sport. As a former athlete, competing in three Junior World Championships, I am passionate about seeing talent realised regardless of differences in family resources".

06. FINANCIAL REVIEW

£ The charity had a net income of £28,012 compared to £10,525 last year

£ The charity received £6,250 of grants compared to £2,200 last year

£ The charity received £16,636 of donations compared to £8,325 last year

£ The charity received £5,000 in sponsorship compared to none last year

£ The charity gave 49 grants totalling £17,225 compared to 27 grants totalling £7,222 last year.

£ The charity had cash reserves of £28,410 at year end compared to £18,232 last year

£ The 3 trustees, Jonathan Eaton, David James and Fiona Carter continue to work on a voluntary basis

£ Our expenses were 2% from just under 4% last year which is inline with our target of keeping them to below 5% each year so that we can maximise grants given to our athletes.

This is the second Trustees' Annual Report and since gaining charity status in 2017 we have supported 37 athletes and given grants amounting to approximately £52,700. For the two years prior to that we supported 4 athletes and between them they received grants in excess of £8,000.



Balance Sheet
From September 2021 to August 2022

	Prior Year		Year to Date	
Fixed Assets		0.00		0.00
Current Assets				
Bank Account	10,178.74		28,410.90	
		10,178.74		28,410.90
Current Liabilities				
		0.00		0.00
Current Assets less Current Liabilities		10,178.74		28,410.90
Total Assets less Current Liabilities		10,178.74		28,410.90
Long Term Liabilities				
		0.00		0.00
Total Assets less Total Liabilities		10,178.74		28,410.90
Capital & Reserves				
Funds	0.00		18,232.16	
P&L Account	10,178.74		10,178.74	
		10,178.74		28,410.90

Profit and Loss
From September 2021 to August 2022

	Prior Year		Year to Date	
Income				
Donations Received	16,636.50		16,636.50	
Grants Received	6,250.00		6,250.00	
Sponsorship.	5,000.00		5,000.00	
Gift Aid	125.79		125.79	
		28,012.29		28,012.29
Expenditure	17,225.00		17,225.00	
Grants Issued		17,225.00		17,225.00
Direct Expenses	30.00		30.00	
Website Costs		30.00		30.00
Gross Profit / (Loss)		10,757.29		10,757.29
Overheads				
Insurance	345.31		345.31	
Paypal Charges	41.24		41.24	
Memberships	192.00		192.00	
Net Profit / (Loss)		587.55		578.55
		10,178.74		10,178.74

CASS
&FRIENDS

emsea

SportsAid

fourthdiscipline

Sports nutrition made practical.



www.cassandfriends.org

2021-22

Date: 29/09/2022
Time: 22:30:52

Cass & Friends
Profit and Loss

From: Month 1, September 2021
To: Month 12, August 2022

Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Income				
Donations Received	16,636.50		16,636.50	
Grants Received	6,250.00		6,250.00	
Sponsorship	5,000.00		5,000.00	
Gift Aid	125.79		125.79	
		28,012.29		28,012.29
Expenditure				
Grants Issued	17,225.00		17,225.00	
		17,225.00		17,225.00
Direct Expenses				
Website Costs	30.00		30.00	
		30.00		30.00
Gross Profit/(Loss):		10,757.29		10,757.29
Overheads				
Insurance	345.31		345.31	
Paypal Charges	41.24		41.24	
Memberships and Subscriptions	192.00		192.00	
		578.55		578.55
Net Profit/(Loss):		10,178.74		10,178.74

Cass & Friends
Balance Sheet

From: Month 1, September 2021
To: Month 12, August 2022
Chart of Accounts: Default Layout of Accounts

	Period		Year to Date	
Fixed Assets		0.00		0.00
Current Assets				
Bank Account	10,178.74		28,410.90	
		10,178.74		28,410.90
Current Liabilities		0.00		0.00
Current Assets less Current Liabilities:		10,178.74		28,410.90
Total Assets less Current Liabilities:		10,178.74		28,410.90
Long Term Liabilities		0.00		0.00
Total Assets less Total Liabilities:		10,178.74		28,410.90
Capital & Reserves				
Funds	0.00		18,232.16	
P & L Account	10,178.74		10,178.74	
		10,178.74		28,410.90

CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A Independent Examiner's Report

Report to the trustees/ members of (Charity Name): CASS + FRIENDS

On accounts for the year ended: 31st AUGUST 2022 | **Charity no (if any)**: 1174703

Set out on pages: 1 (remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/08/2022

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 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 (~~other than that disclosed below~~ *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

** Please delete the words in the brackets if they do not apply.*

Signed: CBishop **Date:** 24/11/2022

Name: CAROLINE JOAN BISHOP

Relevant professional qualification(s) or body (if any):

Address: CHECKETTS GARDEN
LARGTON
BROADWAY WR12 7NA.

CASS & FRIENDS

England & Wales - Charity number 1174703

Accounts


CASS
CASS
CASS

TABLE OF CONTENTS





01.

Trustees' report





02.

2020/2021 Snapshot

03.

The need we work to addrress





04.

Looking ahead

05.

Financial review

“I wanted to extend my greatest appreciation to CASS & Friends aiding my sporting journey as well as giving myself the opportunity to meet athletes from other sports. I would not be the athlete I am now if it was not for your help and support”.



TRUSTEES' REPORT

It is a pleasure to be writing this annual report and sharing the story of CASS & Friends and our exceptional athletes.

We became a charity in 2017 and at the start of this year were supporting 17 of the most hard working and dedicated athletes in the Cotswolds; providing them with grants for their kit and equipment.

Covid 19 meant that many of them were unable to train and compete in their usual way but they all remained focussed and made the best use of the facilities available to them.

We were lucky enough to squeeze in a couple of fundraising events; one just before the first lockdown in March and one just before the winter lockdown so that was a real boost to our fundraising in difficult times.

We continued to mentor our athletes on the 8 week Sporting Success Mindset Programme and in addition worked with athletes outside the organisation who made donations to us having been through the mindset course, which was another advance to our income.

Another initiative we started was the athlete branding and sponsorship programme; helping our athletes to start thinking about their social media presence and how this can help their careers. Each athlete was also invited to do a short interview recorded on you tube to help them with their media profile and presentation skills.

We had our first community gathering for the athletes which was fabulous and Eddie the Eagle spoke to them about overcoming obstacles and being resilient - all very pertinent for our current times.

Fiona Carter, founder and trustee

"Thank you for all the support you have given me over the time we have known each other. It's made a big difference to me and I will never forget it."

2020/2021 SNAPSHOT

27 27 grants were given during the year for our athletes to buy new kit and gym equipment as gyms were closed due to Covid 19.

17 17 athletes were supported including two cyclists, two triathletes, four runners, a fencer, an archer, a boxer, a trampolinist, a fisherman, a darts player, two footballers, and a rower,

7 7 of our athletes have gone through the mindset course and the feedback has been overwhelmingly positive - "Thank you so much for your time and energy I have got so much out of every session I can't begin to tell you."

8 8 athletes have gone through mindset course who are not athletes supported by CASS & Friends and these athletes have made donations to the charity in return for the course.

3 3 events were held this year despite Covid 19 restrictions; a fundraising dinner, a golf day, and our first CASS community event where the athletes shared experiences over pizza and drinks with our Patron Eddie the Eagle talking to them all about resilience.

2 2 athletes were champions at the National Schools Championships.

1 1 athlete was selected to run for the U18 GB team.

1 1 webinar on athlete branding and sponsorship was delivered as the start of this new initiative with several more planned for next year.





THE NEED WE WORK TO ADDRESS

In our local area and indeed throughout the UK, there is little funding for children who are so good at their particular sport that they start competing all over the country (and internationally) if they are going to reach their full potential.

The costs can become prohibitive to some families since there is no prize money involved. The parents have to pay for coaching, kit, physiotherapy, travel expenses, and hotels and we didn't want some children to be at a financial disadvantage compared to their competitors with no financial constraints.

Many of our athletes are also from a rural location which prevents them from accessing gyms and other facilities in more built-up areas.

We truly believe that the skills learned in sports translate into everyday life skills and behaviours and we aim to help our athletes build on this by helping them develop their sporting mindset.

All the athletes we have worked with thank us not only for the financial help but also for the ongoing support and belief in them as athletes. This self-confidence is paramount to success and something we help our athletes develop.

"Thank you for everything you have done for me over the past two years, it means more than I can really put into words. It's clear that you really do care about all the CASS & Friends athletes and we see the hard work that you put in and we appreciate that a lot. Stay in touch."

LOOKING AHEAD

We have learnt over the past 4 years which fundraising events work well and what activities we do that the athletes appreciate. We intend to develop strong relationships with more partners and grow the impact of the charity over the coming years. Here's what we intend to do next year:

1

COLLABORATE WITH SPORTSAID

We are working with SportsAid to partner with them and support their Gloucestershire and Worcestershire based athletes locally.

2

SEEK CORPORATE SPONSORS

Applying for grants is a great way to raise income but a significant corporate sponsor would be a real boost to our bottom line.

3

GRANTS OF UPTO £1000 PER ATHLETE

Giving each athlete grants amounting to £1000 over the course of the year is a challenging target but one that we would like to tackle!

4

RECRUIT ANOTHER PATRON / SPEAKER

Eddie is an awesome patron and he attends most of our fundraising events. Having another patron would alleviate the pressure on Eddie.

5

INCREASE COMMUNITY AWARENESS

Working with the schools of our athletes and the clubs that they attend is a great way to collaborate on fundraising activities and boost the awarenss of CASS & Friends.

6

DEVELOP "ADD ON" INITIATIVES

The additional pastoral help that we give our athletes is deemed to be as important as the financial help.

FINANCIAL REVIEW

£ The charity had a net income of £10,525

£ The charity received £2,200 of grants

£ The charity received £8,325 of donations

£ The charity gave 27 grants to 14 athletes, totalling £7,222

£ The charity had cash reserves of £3,300 at year end

£ The 3 trustees work on a voluntary basis

£ The expenses in the year were leas than 4% of all income and next year the target is to take this down to 2%

This is the first Trustees' Annual Report and since charity status, in 2017 we have supported 22 athletes and given grants to them to pay for kit and expenses amounting to approximately £35,500. For two years prior to that, we supported 4 athletes and between them they received grants in excess of £8,000.



Balance Sheet
From September 2020 to August 2021

	Period		Year to Date	
Fixed Assets		0.00		0.00
Current Assets				
Bank Account	3,302.98		18,232.16	
		3,302.98		18,232.16
Current Liabilities				
		0.00		0.00
Current Assets less Current Liabilities		3,302.98		18,232.16
Total Assets less Current Liabilities		3.302.98		18,232.16
Long Term Liabilities				
		0.00		0.00
Total Assets less Total Liabilities		3,302.98		18,232.16
Capital & Reserves				
Funds	0.00		14,929.18	
P&L Account	3,302.98		3,302.98	
		3,302.98		18,232.16

Profit and Loss
From September 2020 to August 2021

	Period		Year to Date	
Income				
Donations Received	8,325.59		8,325.59	
Grants Received	2,200.00		2,200.00	
		10,525.59		10,525.59
Expenditure	6740.00		6,740.00	
Grants Issued		6,740.00		6,740.00
Direct Expenses	360.00		360.00	
Website Costs		360.00		360.00
Gross Profit / (Loss)		3,425.59		3,425.59
Overheads				
Paypal Charges	26.61		26.61	
Memberships	96.00		96.00	
Net Profit / (Loss)		122.61		122.61
		3,302.98		3.302.98