

Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	07	2020		30	06	2021

Section A Reference and administration details

Charity name

Wisdom of Equus

Other names charity is known by

WOE

Registered charity number (if any)

1175736

Charity's principal address

17 Brymbo Road

Bwlchgwyn

Wrexham

Postcode

LL11 5UA

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Dawn Roberts	Chief Officer	Current	
2	Sandra Wright	Volunteer Co-ordinator	Current	
3	Edwina Lewis	Trustee	Current	
4	Helen Lacey	Trustee	Current	
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

--	--	--

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

--

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	CIO (Charity Incorporated Organisation)
Trustee selection methods (eg. appointed by, elected by)	Elected by board of Trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- ☐ policies and procedures adopted for the induction and training of trustees;
- ☐ the charity's organisational structure and any wider network with which the charity works;
- ☐ relationship with any related parties;
- ☐ trustees' consideration of major risks and the system and procedures to manage them.

Wisdom of Equus has all necessary policies and procedures in place.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

To promote health and well-being for the general public in particular but not limited to individuals with mental and emotional difficulties through the provision of equine enabled education and therapeutic programmes.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Wisdom of Equus has maintained connections with other third sector organisations and has worked hard to develop further connections with local authorities including Flintshire and Wrexham.

We have worked with organisations such as Flintshire Local Voluntary Council, Flintshire Council, Wrexham County Borough Council, AVOW and North Wales Horsecwatch.

All trustees have upheld the guidance issued by the charity commission and are committed to running Wisdom of Equus for the benefit of the public.

Wisdom of Equus is run entirely by volunteers however, due to lockdown restrictions and Covid 19, volunteers have been lost. Volunteers are a vital part of the running of the charity and we hope to recruit more in the future when restrictions are eased.

The onset of the Covid-19 pandemic and lack of a permanent base has had a great effect on our ability to offer services for a large portion of this reporting period. However, we were able to secure a grant from the Moondance Foundation to buy equipment for recording course material and delivering online courses and workshops.

We are delighted to have now secured a permanent base in Minera, Wrexham where can now begin to develop and grow as a charity to offer our services to even more clients.

We will be actively recruiting more trustees in the coming year.

Additional details of objectives and activities (Optional information)

As always, volunteers play a vital role in running the charity and we value the contribution made by them. We hope to recruit more volunteers this coming year.

You **may choose** to include further statements, where relevant, about:

- ☐ policy on grantmaking;
- ☐ policy programme related investment;
- ☐ contribution made by volunteers.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

Over the past twelve months, Wisdom of Equus has:

- ☐ Worked further to establish additional connections with other third sector organisations.
- ☐ Started working with local authorities to deliver courses and equine assisted services.
- ☐ Secured a permanent site for the charity.
- ☐ Begun to develop and deliver online courses.
- ☐ Attended Health & Wellbeing events online.
- ☐ Attended Mental Health Awareness events online.
- ☐ Started planning for future projects.
- ☐ Began to develop facilities on the new site.

Section E

Financial review

Brief statement of the charity's policy on reserves

The charity does not currently have any reserves.

Details of any funds materially in deficit

n/a

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- ☐ the charity's principal sources of funds (including any fundraising);
- ☐ how expenditure has supported the key objectives of the charity;
- ☐ investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	D Roberts	
Full name(s)	Dawn Roberts	
Position (eg Secretary, Chair, etc)	Chief Officer	
Date	27/04/2021	

Wisdom of Equus

Profit and Loss Report

01 July, 2020 - 30 June, 2021

Sales		
4000 - Sales - Products	73.20	
4010 - Sales - Services	320.00	
4900 - Other income	37.20	
10019 - Donation	694.94	
10020 - Grant	1,660.00	
	Total Sales	£2,785.34
Direct Expenses		
10021 - Yard Equipment	117.10	
10023 - PPE	94.48	
10024 - Supplements and Herbs	19.75	
	Total Direct Expenses	£231.33
GROSS PROFIT / LOSS		£2,554.01
Overheads		
7100 - Rent	520.00	
7300 - Vehicle Fuel	63.67	
7510 - Postage and Carriage	4.88	
7530 - Telephone	169.99	
7630 - Business Insurance	98.41	
8210 - Subscriptions	165.90	
8220 - Clothing Costs	20.03	
8230 - Training Costs	459.40	
8240 - Refreshments	44.38	
10001 - Horse Feed	446.15	

10006 - Equine Podiatry	890.00
10007 - Website & Domain Fees	141.61
10010 - Haylage	200.00
10015 - Course Equipment	53.71

Total Overheads	£3,278.13
------------------------	------------------

NET PROFIT / LOSS	-£724.12
--------------------------	-----------------