

# Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	07	2022		30	06	2023

## 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	Helen Lacey	Trustee	Current	
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16				
17				
18				
19				
20	Names of the trustees for the charity, if any, (for example, any custodian trustees)			

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)

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## Section B Structure, governance and management

#### Description of the charity's trusts

Type of governing document  
(eg. trust deed, constitution)

How the charity is constituted  
(eg. trust, association, company)

Trustee selection methods  
(eg. appointed by, elected by)

Constitution

CIO (Charity Incorporated Organisation)

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, Wrexham and Denbighshire

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

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.

We are hoping to obtain further funding in the coming year to develop our services further.

**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. We have met with local volunteer groups to actively encourage volunteers.

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

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## 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.
- Continued with planning consent for an additional building (stables and a teaching room)
- Continued working with local authorities to deliver courses and equine assisted services.
- Attended Health & Wellbeing events online and in person.
- Attended Mental Health Awareness events online and in person
- Continued planning for future projects and fundraising events.
- Attended CPD events.

## 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** 28/04/2024

# Wisdom of Equus

## Profit and Loss Report

01 July, 2022 - 30 June, 2023

### Sales

2001 - General Refund	220.94	
4010 - Sales - Services	3,505.00	
4020 - Sales Discounts	-834.00	
4900 - Other income	36.39	
10019 - Donation	1,192.02	
	<b>Total Sales</b>	<b>£4,120.35</b>

### Direct Expenses

5060 - Other Direct Expenses	733.20	
10018 - Horse Worming	25.40	
10021 - Yard Equipment	1,007.56	
10024 - Supplements and Herbs	124.64	
10025 - Yard Consumables	98.75	
	<b>Total Direct Expenses</b>	<b>£1,989.55</b>

**GROSS PROFIT / LOSS** **£2,130.80**

### Overheads

7100 - Rent	675.00
7300 - Vehicle Fuel	647.39
7310 - Vehicle Repair and Servicing	245.00
7420 - Hotel and Accommodation	161.95
7460 - Subsistence	49.85
7500 - Printing	31.30
7520 - Office Stationery	41.52
7540 - Internet Charges	55.00

7550 - Computer & Software	4.80	
7620 - Consultancy & Professional Fees	280.00	
8200 - General Expenses	114.93	
8210 - Subscriptions	10.00	
8230 - Training Costs	240.00	
8240 - Refreshments	73.26	
10001 - Horse Feed	1,169.28	
10005 - Venue Hire	40.00	
10006 - Equine Podiatry	865.00	
10007 - Website & Domain Fees	152.08	
10010 - Haylage	650.47	
10015 - Course Equipment	8.50	
	<b>Total Overheads</b>	<b>£5,515.33</b>
	<b>NET PROFIT / LOSS</b>	<b>-£3,384.53</b>