



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 01/07/2024  
Period end date

Period start date to 30/06/2025

**Charity name: Wisdom of Equus**

**Charity registration number:1175736**

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To promote health and well-being for the general public and 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 in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	WoE delivers equine assisted education, personal development and therapeutic programmes to the local areas of Wrexham, Denbighshire and Flintshire. We work with vulnerable groups, those affected by trauma, NEET's etc by providing programmes using horses and outdoor activities aimed at increasing confidence, self-esteem, teamwork, resilience, problem-solving, employability and life skills, etc.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All the trustees have upheld the guidance issued by the charity commission and are committed to running Wisdom of Equus for the benefit of the public.

## Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	n/a
Policy on social investment including program related investment	Para 1.38	n/a
		Volunteers are essential to the work of Wisdom of Equus, providing practical

Contribution made by volunteers	Para 1.38	support with horse care, yard maintenance and session preparation, ensuring a safe and welcoming environment for participants. They assist during equine-assisted learning and wellbeing sessions by offering reassurance and helping individuals build confidence, while also supporting community events and outreach activities. Their contribution enhances the charity's capacity, strengthens community connections and adds significant social value, with many volunteers also gaining skills, confidence and pathways into further education or employment.
Other		

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>Over the past year, Wisdom of Equus has made meaningful progress in delivering its mission to support children, young people and adults experiencing emotional, social and mental health challenges. Through equine-assisted learning and community-based activities, the charity has created safe, inclusive spaces where individuals can build confidence, resilience and emotional awareness, contributing to improved wellbeing across North Wales.</p> <p><b>Expanded Partnerships and Collaborative Working</b> The charity has strengthened relationships with local authorities, social services and third sector organisations, increasing referral pathways and enabling more individuals to access support. These partnerships have enhanced the reach and effectiveness of our services, ensuring that those most in need benefit from early, preventative interventions.</p> <p><b>Delivery of Equine-Assisted Learning and Wellbeing Sessions</b> A range of structured one-to-one and small group sessions have been delivered, using horses as responsive, non-judgemental partners. Participants have engaged in activities and groundwork exercises which support the development of emotional regulation, communication skills and self-confidence. Feedback indicates improved self-esteem, reduced anxiety and increased engagement in education and</p>

		<p>daily life.</p> <p><b>Safeguarding, Welfare and Community Awareness</b>  The charity has continued to uphold high standards of equine welfare and participant safety, while also contributing to wider community awareness around responsible horse care and rural safety. This work reinforces the charity's role as a trusted, knowledgeable organisation within both the wellbeing and equine sectors.</p> <p><b>Strategic Development and Future Growth</b>  Significant progress has been made in planning for future sustainability, including the development of new programmes, funding applications and infrastructure improvements. These plans aim to expand year-round provision and increase access for underserved groups.</p> <p><b>Health, Wellbeing and Sector Engagement</b>  Representatives of the charity have actively engaged in local and national wellbeing networks, training opportunities and sector events. This ensures that delivery remains informed by best practice in trauma-informed approaches, mental health support and equine-assisted interventions.</p> <p><b>Community Engagement and Outreach</b>  Wisdom of Equus has maintained a strong presence within the local community, raising awareness of the benefits of equine-assisted support and encouraging wider participation. This has helped reduce stigma around mental health and promote more inclusive, supportive communities.</p> <p><b>Impact on Beneficiaries and Wider Society</b>  The charity's work has directly improved the lives of individuals by increasing confidence, emotional resilience and social connection. Many participants report feeling calmer, more able to cope with challenges and more positive about their future.</p>
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**Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	During the year, Wisdom of Equus increased access to equine-assisted wellbeing sessions, strengthened referral partnerships, and delivered programmes that improved confidence, resilience and engagement. Progress was also made in expanding outreach and developing plans for sustainable, year-round provision.
Performance of fundraising activities against objectives set	Para 1.41	During the year, Wisdom of Equus made steady progress in its fundraising objectives by securing small grants and donations, increasing community support, and developing a pipeline of funding opportunities. While larger capital funding is still in progress, these efforts have strengthened the charity's financial position and laid solid foundations for future growth and sustainability.
Investment performance against objectives	Para 1.41	N/A
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	At the end of the reporting period, Wisdom of Equus remains in a stable financial position, with income from grants, donations and session delivery supporting core operational costs. Expenditure has been carefully managed in line with available resources, ensuring the continued delivery of services, while the charity continues to pursue additional funding opportunities to support future growth and sustainability.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	No reserves held
Amount of reserves held	Para 1.22	n/a
Reasons for holding zero reserves	Para 1.22	At this stage of its development, Wisdom of Equus does not hold financial reserves, as available income is directed towards the immediate delivery of services and essential operational costs. As a small charity with growing demand, priority has been given to maintaining access to support for beneficiaries and ensuring high standards of care and delivery. The charity recognises the importance of building reserves and is working towards this through future fundraising and strategic financial planning to support long-term sustainability.
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	No uncertainties about the charity at this time.

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The principal sources of income for Wisdom of Equus include grants from charitable trusts and public funding programmes, donations from individuals and supporters, and income generated through the delivery of equine-assisted wellbeing sessions and workshops
Investment policy and objectives including any social investment policy adopted	Para 1.46	<p>Wisdom of Equus adopts a cautious approach to investment, reflecting its current scale and focus on service delivery. The charity does not currently hold or manage formal financial investments, with all available funds used to support its charitable activities and operational costs.</p> <p>The charity's priority is to ensure that resources are used effectively to maximise impact for beneficiaries. As the organisation grows, it will review its position</p>

		and consider establishing an investment policy that balances low risk with ethical and socially responsible principles, ensuring that any future investments align with its mission, values and commitment to community wellbeing.
A description of the principal risks facing the charity	Para 1.46	Wisdom of Equus recognises a number of key risks in delivering its services. These include financial sustainability, particularly reliance on grants and donations; capacity constraints due to limited staffing and resources; and maintaining consistent referral pathways. There are also operational risks associated with working with horses and vulnerable individuals, including health and safety, safeguarding and equine welfare. External factors such as changes in funding priorities or increased demand for services may also impact delivery. The charity actively manages these risks through robust policies and procedures, ongoing training, strong governance and continued development of partnerships and funding opportunities.
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	CIO Charitable Incorporated Organisation
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Elected by board of trustees

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	Wisdom of Equus provides new trustees with an induction pack covering key governance documents, policies, and an overview of its work, supported by meetings with existing trustees to clarify roles and responsibilities. Ongoing training is encouraged to ensure trustees remain informed on safeguarding, health and safety, and governance best practice, enabling them to fulfil their duties effectively and contribute to the charity's strategic direction.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	Wisdom of Equus is governed by a Board of Trustees responsible for strategic direction, governance and oversight, with day-to-day operations delivered by a small team supported by volunteers. The charity works collaboratively with a wider network including local authorities, social services, schools, third sector organisations and community groups, enabling effective referral pathways and joined-up support for beneficiaries. In addition, the charity maintains links with the global network of equine-assisted practitioners, ensuring its approach is informed by best practice and ongoing developments within the sector.
Relationship with any related parties	Para 1.51	Wisdom of Equus works in partnership with a small number of organisations to support the delivery and development of its services. All relationships are managed transparently, with appropriate governance arrangements in place to ensure that any potential conflicts of interest are identified and managed in line with the charity's policies, and that decisions are made in the best interests of the charity and its beneficiaries.

Other		
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## Reference and Administrative details

Charity name	Wisdom of Equus
Other name the charity uses	WoE
Registered charity number	1175736
Charity's principal address	17 Brymbo Road Bwlchgwyn Wrexham 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/ Head Facilitator		
2	Sandra Wright	Trustee		
3	Helen Lacey	Trustee		
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Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	n/a
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	n/a
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	n/a

### Additional information (optional)

#### 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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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

*Dawn Roberts*

***Helen Lacey***

Full name(s)

Dawn Roberts

Helen Lacey

Position (eg Secretary,  
Chair, etc)

Chief Executive

Trustee

Date

15/04/2026

# Wisdom of Equus

## Profit and Loss Report

01 July, 2024 - 30 June, 2025

### Sales

2001 - General Refund	9.78	
4000 - Sales - Products	6.94	
4010 - Sales - Services	1,505.00	
4200 - Sale of Assets	260.00	
10019 - Donation	767.00	
10020 - Grant	750.00	
		.....
	<b>Total Sales</b>	<b>£3,298.72</b>

### Direct Expenses

5000 - Cost of Sales - Goods	41.97	
10021 - Yard Equipment	323.24	
10024 - Supplements and Herbs	35.85	
10025 - Yard Consumables	191.97	
		.....
	<b>Total Direct Expenses</b>	<b>£593.03</b>

<b>GROSS PROFIT / LOSS</b>	<b>£2,705.69</b>
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### Overheads

7300 - Vehicle Fuel	148.64
7400 - Travelling	5.30
7460 - Subsistence	49.95
7510 - Postage and Carriage	3.60
7520 - Office Stationery	5.44
7540 - Internet Charges	32.20
7630 - Business Insurance	155.34
8200 - General Expenses	5.00

8210 - Subscriptions	28.39	
8240 - Refreshments	28.56	
10001 - Horse Feed	59.95	
10006 - Equine Podiatry	1,060.00	
10007 - Website & Domain Fees	169.15	
10010 - Haylage	190.00	
10027 - Land Maintenance	9.78	
<b>Total Overheads</b>		<b>£1,951.30</b>
<b>NET PROFIT / LOSS</b>		<b>£754.39</b>