



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1st January 2021 To December 31st 2021

**Charity name: Calon Riding for the Disabled Association
incorporating carriage driving (Calon RDA)**

Charity registration number: 1177265

Objectives and Activities

| | SORP reference | |
|--|--------------------|--|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | Promote the objects of the RDA by providing disabled people with the opportunity to ride to benefit their health and well being. |
| 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 | Riding, equestrian vaulting and equine assisted activities for people with disabilities, mental health conditions and children living in care. Educational opportunities for children and adults with disabilities. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit | Para 1.18 | Full set of accounts available to members and charity commission for financial year, approved and signed by one or more trustees of the group- then put forward to AGM within 15 months of previous AGM |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|------------------------|----------------|---|
| Policy on grant making | Para 1.38 | Grants have been applied for and awarded for new equipment essential for safe running of the group activities and to allow better access to activities for less mobile beneficiaries- e.g mounting block and platform for riding sessions. Two grants have allowed the group to employ one member of staff, part-time, to assist volunteers with essential day to day duties caring for the groups horses and keeping volunteers and beneficiaries safe. |
| | Para 1.38 | |

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| Policy on social investment including program related investment | | |
| Contribution made by volunteers | Para 1.38 | 5 volunteers work on a rota system to fulfil the daily work with the horses and to mentor 4 disabled volunteers to carry out duties on the yard. A further 19 volunteers help with RDA sessions directly with disabled beneficiaries |
| Other | | 6 horses are used for RDA sessions and horse care opportunities. Facilities also hired from two other Riding schools to facilitate number of people wanting activities on a weekly basis |

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>We suspended activities during the 'Wales firebreak' December 2020 lockdown, but were able to re-open sessions in March 2021 under the Welsh Governments rules, allowing people with disabilities and specific health conditions to be able to exercise during Covid19 restrictions.</p> <p>All of our participants came back to sessions with the exception of the school group from Branas Isaf. The school group was a group of 17 pupils coming on a rota system.</p> <p>This year the number of disabled participants who ride and vault with us regularly has increased to 24, and 4 independent riders continue to ride at other venues but access RDA grades, training and competition opportunities through our charity.</p> <p>Of our participants, 15 are children and young people, and 9 are adults.</p> <p>On Fridays we offer activities such as ASDAN qualifications, RDA proficiency tests and awards as well as facilitating new volunteers helping directly with the horses, 6 of whom are disabled. This has</p> |

| | | |
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| | | <p>been made possible by a joint grant from the Anne Duchess of Westminster's Charity and the Peter o Sullivan Charitable Trust to pay for a staff member 24hours per week to ensure the Group can expand and sustain itself long term.</p> <p>The trustees have refurbished a classroom in the outbuildings, and now rent a portaloo on site that can facilitate wheelchairs.</p> <p>The 2021 RDA North Wales Qualifier competition was held in June ('virtually' by filmed entries due to Covid19), and 12 Calon riders submitted entries in Dressage, Show jumping and Countryside challenge. 9 riders qualified for the RDA National Championships, which will also be held 'virtually,' at the end of September.</p> <p>22 participants have also gained RDA proficiency grade tests in horse care and riding during sessions or over 'zoom' horse care sessions during lockdowns.</p> <p>Tuesdays we also offer opportunities for disabled people to volunteer with us and gain qualifications and awards related to the equine industry and RDA.</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 | We have increased services to our beneficiaries from 2 days per week to 4-5 days per week, increasing the number of disabled people we can help from 20(in Jan 2021) to 28 (in December 2022) |
| Performance of fundraising activities against objectives set | Para 1.41 | Fundraising objectives were to expand facilities, employ a part time member of staff to assist with expansion and to ensure horses are cared for on a daily basis, as well as facilitating people with disabilities to be able to volunteer and learn how to care for the horses and have opportunities to gain awards and qualifications. This was achieved by July 2021 and we continue to expand. |
| Investment performance | Para 1.41 | |

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| against objectives | | |
| Other | | |

Financial Review

| | | |
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| Review of the charity's financial position at the end of the period | Para 1.21 | The charity bank balance at 31st Dec was £26,830.93 |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | The trustees agreed a reserve policy of 12 months running costs (approximately £17,000) |
| Amount of reserves held | Para 1.22 | At Dec 31st the was £17,268 unrestricted reserves and £9,500 restricted reserves from grants. |
| Reasons for holding zero reserves | Para 1.22 | |
| Details of fund materially in deficit | Para 1.24 | |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 | None- charity is in a stable financial position with approx 12 months of reserves |

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 | Approx 14% of income is from rider donations/fees for RDA activities. Approx 65% comes from grants and the remainder comes from fundraising activities such as adopt a pony, plant stall, sponsored walks/rides etc |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 | |
| A description of the principal risks facing the charity | Para 1.46 | Horse vet bills cannot be predicted and can be costly. Without a staff member we could not function long term with only volunteers caring for the horses |
| Other | | |

Structure, Governance and Management

| | | |
|---|-----------|---|
| Description of charity's trusts: | | 6 horses, equipment shed, field shelter. Tack and equine equipment |
| Type of governing document (trust deed, royal charter) | Para 1.25 | Membership Constitution Riding for the Disabled Association |
| How is the charity constituted? (e.g unincorporated association, CIO) | Para 1.25 | CIO |
| 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 | One third of trustees shall retire at each AGM, new trustees will be voted upon by the group's members at the AGM. Voting may be by proxy, in person or by postal /electronic vote. New trustees may also be appointed by current trustees provided the limit does not exceed 11 trustees. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
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| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | New trustees first must attend 6 meetings and be given the RDA trustee welcome pack which also signposts prospective trustees to relevant charity commission website. After 6 meetings they may then be appointed during a trustee meeting or AGM and sign RDA trustee acceptance form and declare any conflict of interest |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Calon RDA is affiliated to RDA UK and promotes the objects of the National RDA charity. |
| Relationship with any related parties | Para 1.51 | |
| Other | | |

Reference and Administrative details

| | |
|--------------|---|
| Charity name | Calon Riding for the Disabled Association |
|--------------|---|

| | |
|-----------------------------|--|
| | incorporating carriage driving |
| Other name the charity uses | Calon RDA |
| Registered charity number | 1177265 |
| Charity's principal address | Brenhinlle Fawr, Llandegla, Denbighshire, LL11 3AT |
| | |

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 | Barbara Himsworth | Chair and Secretary | | |
| 2 | Shona Alys Lewis-Jones | Treasurer | | |
| 3 | Penelope Mitchell | | | |
| 4 | Trevor Reece Jones | | | |
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Corporate trustees - names of the directors at the date the report was approved

| Director name | | |
|---------------|--|--|
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Name of trustees holding title to property belonging to the charity

| Trustee name | Dates acted if not for whole year | |
|--------------|-----------------------------------|--|
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Funds held as custodian trustees on behalf of others

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

Additional information (optional)

Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
| | | |
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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)



Full name(s)

Shona Alys Lewis-Jones

Barbara Himsworth

Position (eg
Secretary, Chair, etc)

Treasurer

Chair and secretary

Date

17.2.22

CALON ACCOUNTS 2021

| | JAN | FEB | MARCH | APRIL | MAY | JUNE | JULY |
|----------------------|--------|---------|---------|---------|-----------|-----------|---------|
| INCOME | | | | | | | |
| B/F | ### | | | | | | |
| VMG | £60.00 | ### | ### | £15.00 | £68.75 | £0.10 | |
| DON | £20.00 | | ### | £20.00 | £77.00 | £12.75 | £7.99 |
| EBAY/SALES | £81.90 | £393.48 | £18.00 | £10.00 | | | |
| ADOPT A PONY | £30.50 | | £50.00 | £25.00 | £25.00 | £25.00 | |
| GIFT AID | | £482.56 | | | | | |
| GRANTS | | £100.00 | ### | ### | £7,500.00 | £500.00 | £100.00 |
| CALON CHALLENGE | | £46.50 | £70.00 | £200.00 | £85.00 | | |
| FEES | £60.00 | £120.00 | £150.00 | £785.00 | £695.00 | £496.00 | £255.00 |
| DON BOX | | | £19.90 | | £38.67 | | £70.68 |
| EVE PLANTS | | | £100.00 | £101.81 | £100.50 | £300.00 | £100.00 |
| CLOTHING | | | | | £417.00 | | £30.00 |
| AMAZON | | | | | £6.83 | | |
| COMPETION ENTRIES | | | | | | | |
| REFUNDED CHEQUE 0041 | | | | | | | |
| REFUNDED CHEQUE 0042 | | | | | | | |
| GRAND DAY OUT | | | | | | | |
| TOTAL | ### | ### | ### | ### | £9,013.75 | £1,333.85 | £563.67 |

EXPENDITURE

| | | | | | | | |
|----------------------|--|---------|---------|---------|-----------|-----------|---------|
| VOL EXP | | £24.90 | £233.40 | £203.35 | | £73.80 | £184.95 |
| TRAINING | | £220.00 | £585.00 | £400.00 | | | |
| SESSIONS HIRE | | £120.00 | £125.00 | £175.00 | £380.00 | £296.25 | £380.00 |
| AMI HIPPO COURSE | | £150.00 | | | | | |
| HORSE PHYSIO | | £70.00 | £280.00 | £75.00 | £75.00 | | £75.00 |
| VET | | | £28.60 | | £181.95 | | ### |
| HORSE EQUIP/CARE | | | £525.00 | £42.92 | £269.76 | £591.10 | £79.99 |
| EQUINE DENTIST | | | £100.00 | | | £120.00 | |
| EQPT AND MAINTENANCE | | | £894.00 | | £2,848.74 | £236.29 | £440.97 |
| PONY PEDICURES | | | £100.00 | | £100.00 | £100.00 | |
| WYNNSTAY | | | £69.36 | £43.68 | £18.28 | £149.28 | |
| WAGES/PAYROLL | | | | | £480.00 | £600.00 | ### |
| REPAY DON | | | ### | | | | |
| POSTAGE | | | £48.82 | | | | |
| MEMBERSHIP/INS | | | | £360.00 | £37.50 | | |
| CLINIC | | | | | £68.75 | £341.80 | |
| CLOTHING | | | | | | £439.00 | |
| AUDITOR | | | | | | £60.00 | |
| GRAND DAY OUT | | | | | | | |
| NEST PENSIONS | | | | | | | |
| HMRC | | | | | | | |
| CHEQUE 0042 | | | | | | | |
| CHEQUE 0041 | | | | | | | |
| PORTALOO HIRE | | | | | | | |
| TOTAL | | £584.90 | ### | ### | £4,459.98 | £3,007.52 | ### |

BALANCE

Restricted funds

unrestricted funds

| AUG | SEPT | OCT | NOV | DEC | TOTAL |
|---------|---------|---------|---------|---------|---------|
| | | | | | ### |
| | | | | | ### |
| £5.00 | £52.58 | | | £285.00 | ### |
| | £186.00 | | £20.00 | £43.00 | £752.38 |
| £25.00 | | | | | £180.50 |
| | | | | | £482.56 |
| | | ### | | | ### |
| | | | | | £401.50 |
| £142.50 | £860.00 | £512.00 | ### | £915.00 | ### |
| | £128.95 | | | | £258.20 |
| £182.25 | | | | £107.50 | £992.06 |
| £10.00 | £12.00 | | | | £469.00 |
| £5.59 | | | | £6.26 | £18.68 |
| | £54.00 | | | | £54.00 |
| | | £606.81 | | | £606.81 |
| | | | £533.00 | | £533.00 |
| £106.00 | | | | | £106.00 |
| £476.34 | ### | ### | ### | ### | ### |
| | | | | | |
| | £167.85 | £240.00 | ### | | ### |
| | | £260.00 | £54.00 | £160.00 | ### |
| £225.00 | | £565.75 | £130.00 | ### | ### |
| | | | | | £150.00 |
| £75.00 | | £180.00 | | | £830.00 |
| | | £606.81 | £778.00 | | ### |
| £48.12 | | | | | ### |
| | | | | | £220.00 |
| £150.78 | £363.82 | | | | ### |
| £100.00 | | £175.00 | | £100.00 | £675.00 |
| £18.28 | | £9.14 | £253.19 | £241.75 | £802.96 |
| ### | ### | ### | ### | ### | ### |
| | | | | | ### |
| | | | | | £48.82 |
| | | | | | £397.50 |
| | | | | | £410.55 |
| | | | | | £439.00 |
| | | | | | £60.00 |
| £100.00 | | | | | £100.00 |
| £50.96 | £50.96 | £50.96 | £50.96 | | £203.84 |
| | £108.24 | | | | £108.24 |
| | | | £533.00 | | £533.00 |
| | | £606.81 | | | £606.81 |
| £252.00 | | £138.00 | £186.00 | £180.00 | £756.00 |
| ### | ### | ### | ### | ### | ### |
| | | | | | ### |
| | | | | | ### |

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GRANTS 2021

| | | SUM AWARDED | SPENT | UNSPEN |
|------------|-----|-------------|---------------------|--------|
| CRAY TRUST | ### | ### | ### unrestricted | |
| MONEYSMK | ### | £900.00 | ### restricted | |
| LORD BARN | ### | ### | £0.00 restricted | ### |
| SIR POS | ### | ### | ### restricte wages | ### |
| LLOYD WIN | ### | ### | ### restricted | |
| ADW | ### | ### | ### restricte wages | ### |
| TEN%FOUNI | ### | £500.00 | £564.16 restricted | |
| CRAY TRUST | ### | ### | £0.00 unrestricted | |

| | | | | |
|-------|--|-----|--|-----|
| Total | | ### | | ### |
|-------|--|-----|--|-----|

| | | | | |
|---------------------------|--|--|-----|--|
| total capital items spent | | | ### | |
|---------------------------|--|--|-----|--|

└ Restricted funds

UNSPENT Unrestricted funds
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Independent Examiners Report

I report that on the accounts of the Trust for the year ended 31st December 2021

Respective responsibilities of the trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an Independent Examination is needed.

It is my responsibility to

- Examine the accounts under section 145 of the Charities Act;
- To follow the procedures laid down in the general direction given by the Charity Commission under Section 145(5)(b) of the Charities Act; and
- To state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Direction given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the account presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a "true and fair view" and the report is limited to those matters set out in the statement below.

Independent Examiners Report

In connection with my examination, no matter has come to my attention:

1. Which gives me reasonable cause to believe that in any material respect the requirements:
 - a. To keep accounting records in accordance with Section 130 of the Charities Act; and
 - b. To prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities ActHave not been met; or
2. To which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached,


.....

Katherine Prince AVOW

Dated 6/5/2022
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