



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' annual report (including Directors' report) for the period

From: 1st Jan 2022

To: 31st December 2022

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 equine activities 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 each financial year, approved and signed by one or more trustees of the group- then put forward to AGM within 15 months of previous AGM. Accounts independently examined by a local voluntary council finance member of staff.

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 and facilities for less mobile beneficiaries e.g Disabled portaloo purchased by the group. Other grants have been received for a second member of staff (8 hours per week) and for volunteer costs, so that we can continue to keep beneficiary's fees as low as possible despite rise in living costs in general.

Contribution made by volunteers	Para 1.38	<p>5 volunteers work on the yard on a rota, along with 2 part time staff, to care for the horses and mentor 4 disabled volunteers to carry out duties on the yard. 2 students come to us on work placements 2 days per week to volunteer, and learn equine management skills.</p> <p>A team of 9 regular volunteers help weekly with RDA sessions, and a further 20 volunteers help us when they can.</p>
Other		<p>6 horses were used this year at home venue. Facilities and 20+ other horses were hired from two riding establishments for our busiest RDA sessions, to facilitate larger number of beneficiaries wanting to ride and vault with us. .</p>

Achievements and performance

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>Our charity has expanded again in 2022, the total number of riders and vaulters on Thursdays and Sundays rising from 24 in Dec 2021 to 34 riders and vaulters in Dec 2022.</p> <p>Of our beneficiaries, 25 are children and young people, and 9 are adults.</p> <p>6 children and young adults attend Education day on Fridays: ASDAN qualifications, RDA proficiency tests and Bronze horse care awards have been completed, as well as work experience placements from 2 young people from Coleg Cambria and Northop College.</p> <p>Monday, Tuesdays and Fridays we have offered 'all day' volunteering opportunities to disabled people to work directly with the horses on the yard, learning how to care for the horses. We are the only RDA group that offers this service in North Wales, and 5 volunteers work alongside our staff members to mentor disabled volunteers on these days to ensure their safety.</p> <p>We have organised advanced coaches to come monthly to riding sessions to help progress our riders on Thursdays, and riders have passed RDA Bronze and Silver Riding awards, Show jumping proficiency grades and also taken part in virtual competitions in the 'Dressage Anywhere Championships'</p>
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		<p>Riders attended the first North Wales face-to-face Qualifier competition held since before the outbreaks of the Covid pandemic in 2019.</p> <p>9 riders took part in the dressage and countryside challenge classes and 8 gained a qualifying place for the National RDA Championships in July at Hartpury College.</p> <p>Along with these 8 riders who qualified, 3 vaulters and 1 show jumper took part at Hartpury.</p> <p>Sadly 2 Dressage riders could not compete on the Sunday at Hartpury due to extreme hot weather causing the day to be cancelled- but riders and vaulters achieved several 1st, 2nd, 3rd and 4th places in the Friday and Saturday classes.</p> <p>A Grant has paid for a new Disabled accessible Portaloo, for our home venue, which has cut our costs of hiring a portaloo. Grants have also bought new fencing materials and equipment needed so we can start improving the car park and accessibility at the site in the early spring 2023.</p> <p>This will allow people with wheelchairs or limited mobility better access to our services at home in future months.</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 our services by expanding the number of RDA riding and vaulting sessions we hold on Thursdays and Sundays, allowing us to accept 10 new beneficiaries. .
Performance of fundraising activities against objectives set	Para 1.41	Fundraising objectives - to employ a second member of staff two mornings a week to take the pressure off volunteers and other staff member and ensure the horses are cared for daily. This was achieved in April 2022 from a grant for 8 hours per week from the Steve Morgan Foundation for 12months.
Investment performance against objectives	Para 1.41	
Other		

Financial review

Review of the charity's financial position at the end of the period	Para 1.21	The charity bank balance on 31st Dec was £15,029.30 Restricted reserves on 31st Dec were £8,625
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trustees agreed a reserve policy of 4-6months running costs.
Amount of reserves held	Para 1.22	At 31st Dec the group held £8,625 Restricted reserves and £6,404.30 unrestricted reserves
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	<p>Estimated running costs for 2023 are £1,091.33 per month- meaning our free reserves are within our reserves policy- we have approximately 5.3 months reserves on Dec31st 2022.</p> <p>Trustees have in place measures to reduce costs in winter months, eg reducing horse bedding and using only 4 horses going forward to 2023. 3 of these horses are on 'sessional loan' to the group, therefore their costs are paid for by horses' owner. One horse owned by the group was sent to the riding centre in Oswestry on working loan- meaning our riders can continue to use him on Thursdays, but the riding centre responsible for his care and upkeep- reducing cost to the group.</p> <p>We aim to apply for more Grants in 2023 to help pay for costs, such as the running costs of the group vehicle, meaning we can keep our unrestricted reserves at 4-6months in 2023.</p>

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	£26,763.05 was brought forward from 2021. Approx 39% income came from grants in 2022, 14% of income came from participant fees/donations for activities. The remainder came from fundraising activities- such as the plant stall, car boots and stall at shows, donations 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	<p>If the charity does not secure grants for staff wages in 2023 we would not function long term at our current level of activities using volunteers alone</p> <p>We need more coaches to ensure we don't have to cancel sessions if our coach is ill.</p> <p>Horse vet bills cannot be predicted and can be costly.</p>
Other		<p>The rising costs of living mean our beneficiaries are facing increasing costs but we do not wish to raise our fees, therefore we aim to spend more time and effort fundraising in 2023 to ensure we can continue our activities without putting up our prices.</p>

Structure, governance and management

Description of charity's trusts:		
Type of governing document: for example, trust deed, memorandum and articles of association etc	Para 1.25	Membership constitution RDA
How is the charity constituted? for example limited company, 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	<p>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.</p> <p>New trustees may also be appointed by current trustees provided the limit does not exceed 11 trustees.</p>

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	<p>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.</p> <p>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</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<p>Calon RDA is affiliated to RDA U.K. and promotes the objects of this national charity.</p>
Relationship with any related		Vehicle bought by the group from one of the trustees. Conflict of interest

parties	Para 1.51	<p>statement:</p> <p>‘The group previously had free use of a vehicle owned by a trustee, however the trustee informed the board that they no longer wanted to keep a big vehicle due to increasing cost of diesel, and intended to sell the vehicle and buy a smaller cheaper vehicle to run. This would mean the group would no longer have access to a towing vehicle to transport horses to activities, equine dentist etc</p> <p>The other trustees discussed this at a meeting on the 27th June 2022, and the fact that the group needed their own ‘vehicle insurance’ to cover travelling volunteers to activities. The trustees decided the best way forward was to offer to buy the vehicle, so that the group could continue to run immediately rather than fundraise for a grant to buy a newer vehicle which would mean an interruption of services.</p> <p>The trustee who owned the vehicle declared a conflict of interest and was not present during the decision made by all the other trustees to offer £3000 to buy the vehicle, and the conflict of interest was noted in the minutes of the meeting. Quotes were looked into for vehicles of similar type and mileage, and were in the region of £4000-6000.</p> <p>The trustee then agreed to sell the vehicle to the group at £3000.’</p>
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		Calon RDA
2	Alys Lewis-Jones	Treasurer		Calon RDA
3	Penelope Mitchell			Calon RDA
4	Trevor Jones			Calon RDA
5				

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7				
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10				
11				

Corporate trustees – names of the directors at the date the report was approved

Director name	

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year

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

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 company has taken advantage of the small companies' exemption in preparing the report above.

The trustees declare that they have approved the trustees' report (including directors' report) above.

Signed on behalf of the charity's trustees/directors

Signature(s)

	
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Full name(s)

Barbara Mary Himsworth	Shona Alys Lewis-Jones
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Position (for example
Secretary, Chair, etc)

Chair	
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Date

13.4.23

CALON ACCOUNTS 2022

BALANCE	£15,029.30
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GRANTS 2022

		SUM AWARDED	SPENT	Unspent	Restricted	Unrestricted
Community foundation inWales	18/03/2022	£2,021.00	£2,021.00 restricted			
STEVE MORGAN foundation	25/04/2022 £346.67 MONTHLY	£3,120.03	£3,120.03 restricted WAGES			
Lord Barnaby foundation	30/03/2021	£2,000.00	£2,076.52 restricted			
Anne Duchess of Westminster Fund	26/09/2022	£7,500.00	£3,437.50 restricted WAGES	4062.5	4062.5	
Peter O' Sullivan Charitable Trust	04/07/2022	£7,500.00	£3,437.50 restricted WAGES	4062.5	4062.5	
CAF	30/12/2022	£500.00	restricted	500	500	
CLA Charitable trust	15/11/2022	£2,100.00	£2,115.54 restricted			
Yapp	29/11/2022	£2,500.00	unrestricted	2500		2500
Balance						3904.3
TOTAL		£27,241.03	£16,208.09	11125	8625	6404.3

Independent Examiners Report

I report that on the accounts of Calon RDA for the year ended 31st December 2022

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.

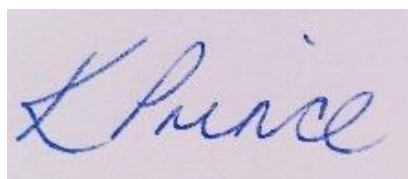
Basis of independent examiner's report

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,



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Dated.....14th April 2023

Katherine Prince AVOW

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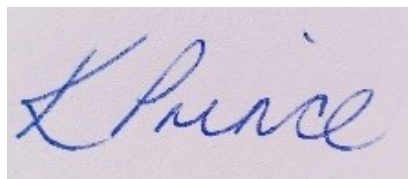
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2023

Katherine Prince AVOW

Dated.....14th April

