



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1st Jan 2023 Period start date To 31st Dec 2023 Period end date

Charity name: **Calon Riding for the Disabled Association (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, mental health conditions and social and emotional needs. Equine assisted activities for elderly people, people who feel isolated due to ill health and people living with long term health conditions such as dementia.
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 that will help our beneficiaries directly as well as help the charity to become more resilient and carry out its aims, without our beneficiaries being affected by increasing costs to the charity, such as fuel, site maintenance etc. This year we have had grants awarded for staff wages, site improvement, vehicle servicing, MOT, trailer servicing and for starting a new activity for elderly people and other beneficiaries called 'Tea with a pony' – which aims to improve mental health and well-being.

		At the end of 2023 we received further grants for a new fixed term contract for 12 months for a part-time member of staff. Also a new equipment storage building, quad and harrows to maintain the riding arena surface on site to ensure volunteer and beneficiaries safety and that of the horses and staff.
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	We have 28 regular volunteers who help with the horses, education activities and RDA sessions, and 8 volunteers who help when they can. 18 of our volunteers have a disability, mental health condition or medical condition that impacts their health and without our volunteers we could not function as a charity.
Other		5 horses were used this year at our home venue for activities. Facilities and 20+ other horses were hired from two riding establishments to facilitate our growing numbers of beneficiaries.

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>Our charity has continued to grow in 2023, the total number of riders and vaulters rising from 34 in Dec 2022 to 42 in Dec 2023.</p> <p>Of our beneficiaries taking part in 2023 for riding, vaulting and educational activities : 30 were children and young people, and 12 were adults.</p> <p>The new activity started monthly in March called 'Tea with a pony' has allowed 75 new beneficiaries to take part and 87 in total.</p> <p>5 children and 4 young adults attended Education day on Fridays: ASDAN qualifications, RDA proficiency tests and awards have been completed as well as work experience placements for 2 young people from local colleges.</p> <p>Tuesdays, Thursdays and Fridays we have offered volunteering opportunities to disabled people to work directly with</p>

		<p>the horses on the yard, learning how to care for them. We are the only RDA group that offers this service in North Wales for 3 days per week. 6 volunteers work alongside our staff to mentor disabled volunteers on these days to ensure their safety.</p> <p>Riders and vaulters have taken part in online and face to face competitions, such as 'Dressage Anywhere' and the 'RDA Regional and National Championships.'</p> <p>20 riders and vaulters took part in competitions in 2023, all gaining over 60% - and 100% of them came in the top 6 in their class in at least one competition they entered.</p> <p>Site improvements have been started to improve access to the site for wheel chair users and for people with limited mobility.</p> <p>Monthly Tea with a Pony activities allowed us to reach out to 75 new beneficiaries, at a variety of venues such as care homes for the elderly and allowed us to network with other organisations such as KIM (mental health groups) and local nursery and school classes.</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 – allowing us to help 8 new beneficiaries (Riding and vaulting) and 75 new beneficiaries (Tea with a pony)
Performance of fundraising activities against objectives set	Para 1.41	<p>Fundraising objectives- to continue to employ 2 part time staff members to ensure the horses are cared for daily with the help of volunteers, without needing to increase cost to our beneficiaries. This was achieved from Grants from the Peter O Sullivan Charitable trust and Cray trust as well as fundraising efforts at local shows, car boots and stalls.</p> <p>Site improvements and increasing opportunities at home site, free activities (such as Tea with a pony and horse care activities) and volunteering training and opportunities have been reached by grants from RIF small grant scheme, Horses4Health and RDA UK, Community foundation in Wales and the Denbighshire Key Fund.</p>

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's total funds on 31st Dec were £19,261
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The trustees reserves policy is to hold 4-6 months running costs in reserve
Amount of reserves held	Para 1.22	Restricted reserves on 31st Dec were £10,895 Unrestricted reserves on 31st Dec were £8,366
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	

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	£15,029.30 was brought forward from 2023. Approximately 19% income came from beneficiaries' donations towards sessions, 73% came from grants and the remainder from public donations and fundraising events.
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	The principal risks to the charity are – not securing enough income for wages (however we have recently been awarded a 3 year grant for one staff member and 12months for the other staff member in 2024) We also need to train more coaches – to ensure long term security of the group Horse vet bills cannot be predicted and can be costly.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Membership constitution RDA
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:

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 forms and declare any conflict of interest in writing
The charity's organisational structure and any wider network with which the charity works	Para 1.51	Calon RDA is affiliated to RDA U.K. and promotes the objects of this national 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		Calon RDA
2	Alys Lewis-Jones	Treasurer		Calon RDA
3	Penelope Mitchell			Calon RDA
4	Trevor Jones			Calon RDA
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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	
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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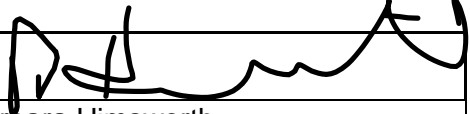
Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Alys Lewis-Jones	Barbara Himsworth
Position (eg Secretary, Chair, etc)	Treasurer	
Date	5.4.24	

CALON RDA	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
	Aug			Sep			Oct			Nov			Dec			2023 YTD TOTAL		
INCOME																		
Adopt a Pony			0			0			0			0			0	25	0	25
Amazon Smile			0			0			0			0			0	63	0	63
Auction Sales	221		221			0	23		23			0			0	270	0	270
Car Boot & Show Sales			0	1173		1173			0	71		71	528		528	1772	0	1772
Competitions			0	130		130			0			0			0	547	0	547
Donations			0	331		331			0	275		275			0	838	0	838
Fees	244		244	692		692	1976		1976	855		855	2293		2293	10535	0	10535
Grants			0			0			0	21433		21433			0	5000	35927	40927
Lottery - Charity Giving	2		2	2		2	2		2	2		2	2		2	24	0	24
Other Operating Income	75		75	90		90			0			0			0	630	0	630
Plant Sales			0	60		60			0			0			0	350	0	350
Sales			0			0	40		40	20		20			0	60	0	60
Totals	£542	£0	£542	£2,478	£0	£2,478	£2,041	£0	£2,041	£1,223	£21,433	£22,656	£2,823	£0	£2,823	£20,114	£35,927	£56,041
EXPENDITURE																		
Asset Purchases			0			0			0	177	14496	14,673			0	177	14496	14673
Accountancy Fees	27		27	27		27	27		27	27		27	27		27	324	0	324
Competitions			0			0	204		204			0			0	418	0	418
Equipment			0			0	230		230	230	768	998		77	77	230	1525	1755
Horse Care - dentist			0			0	55		55	60		60			0	295	0	295
Horse Care - equipment			0			0			0			0			0	25	0	25
Horse Care - feed & bedding			0			0	19		19	192		192	269		269	1173	0	1173
Horse Care - general	130		130			0			0			0			0	130	0	130
Horse Care - hoof trimming	100		100	125		125			0	125		125	125		125	975	0	975
Horse Care - physio			0	180		180	65		65	60		60			0	485	0	485
Horse Care - vet			0	19		19			0			0			0	46	0	46
Horse Hire			0			0			0			0			0	140	0	140
Insurance			0			0			0			0			0	426	0	426
Motor Fuel	133		133	67		67	68		68			0	269		269	1064	0	1064
Motor Repairs			0			0	50		50			0			0	365	887	1252
Motor - Tax & Insurance	659	148	807			0			0			0	245		245	904	148	1052
Other - legal & professional			0			0			0			0	37		37	37	0	37
Pension	51		51	66		66	54		54	61		61	57		57	408	119	527
Repairs & Maintenance		130	130	42		42	42		42			0	290		290	84	420	504
Sessions Hire	239		239	1,497		1,497	722		722	864		864	1,116		1,116	8616	0	8616
Stationery, Printing & Postage	25		25			0	9		9			0			0	34	0	34
Subscriptions			0			0			0			0			0	60	0	60
Sundry			0			0	20		20			0			0	20	0	20
Tea With a Pony		98	98			0			0			0	296		296	0	1307	1307
Training	220		220			0			0			0			0	360	0	360
Volunteer Expenses			0	65		65			0	200		200			0	741	0	741
Wages/Pension	0	1,208	1,208	0	1,117	1,117	186	1,170	1,356		1,140	1,140		1,117	1,117	615	14756	15371
Suspense			0			0			0			0			0	0	0	0
Totals	£1,584	£1,584	£3,168	£2,088	£1,117	£3,205	£1,521	£1,400	£2,921	£1,996	£16,404	£18,400	£2,145	£1,780	£3,925	£18,152	£33,658	£51,810
Net Receipts/-payments	-£1,042	-£1,584	-£2,626	£390	-£1,117	-£727	£520	-£1,400	-£880	-£773	£5,029	£4,256	£678	-£1,780	-£1,102	£1,962	£2,269	£4,231
Funds opening balance b/f	£8,593	£11,746	£20,339	£7,551	£10,162	£17,713	£7,941	£9,045	£16,986	£8,461	£7,645	£16,106	£7,688	£12,674	£20,362	£6,404	£8,625	£15,029
Funds closing balance c/f	£7,551	£10,162	£17,713	£7,941	£9,045	£16,986	£8,461	£7,645	£16,106	£7,688	£12,674	£20,362	£8,366	£10,894	£19,260	£8,366	£10,894	£19,260
	Aug			Sep			Oct			Nov			Dec			2023 YTD TOTAL		
FUNDS ANALYSIS																		
	B/f	Net Change	C/f	B/f	Net Change	C/f	B/f	Net Change	C/f	B/f	Net Change	C/f	B/f	Net Change	C/f	B/f	Net Change	C/f
Restricted Funds																		
Anne Duchess	1258	-411	847	847	-380	467	467	-398	69	69	-69	0	0	0	0	4063	-4063	0
P O'Sullivan	6786	-797	5989	5989	-737	5252	5252	-772	4480	4480	-1071	3409	3409	-1117	2292	4063	-1771	2292
CAF	50	0	50	50	0	50	50	0	50	50	0	50	50	0	50	500	-450	50
S Morgan Foundation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C&V Sup Conwy RIF (TWAP)	804	-228	576	576	0	576	576	0	576	576	0	576	576	-296	280	0	280	280
CFW - Vehicle	148	-148	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SJP - GA	2500	0	2500	2500	0	2500	2500	-230	2270	2270	-768	1502	1502	-367	1135	0	1135	1135
RDA (TWAP)	201	0	201	201	0	201	201	0	201	201	0	201	201	0	201	0	201	201
DVCS Key Fund										0	6937	6937	6937	0	6937	0	6937	6937
Restricted Funds	£11,747	-£1,584	£10,163	£10,163	-£1,117	£9,046	£9,046	-£1,400	£7,646	£7,646	£5,029	£12,675	£12,675	-£1,780	£10,895	£8,625	£2,270	£10,895
Unrestricted Funds	£8,593	-£1,042	£7,551	£7,551	£390	£7,941	£7,941	£520	£8,461	£8,461	-£773	£7,688	£7,688	£678	£8,366	£6,404	£1,962	£8,366
Total Funds	£20,340	-£2,626	£17,714	£17,714	-£727	£16,987	£16,987	-£880	£16,107	£16,107	£4,256	£20,363	£20,363	-£1,102	£19,261	£15,029	£4,232	£19,261

Independent Examiners Report

I report that on the accounts of Calon RDA for the year ended 31st December 2023

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 accounts 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.

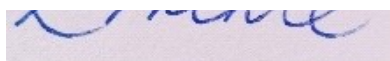
Independent Examiners Report

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

- Which gives me reasonable cause to believe that in any material respect the requirements:
 - To keep accounting records in accordance with Section 130 of the Charities Act: and
 - To prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act

Have not been met: or

- 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.....28th May 2024

Katherine Prince AVOW