

Trustees' Annual Report for the period:							
	Period start date				Period end date		
	01	04	2020		31	03	2021
From				To			

Section A Reference and administration details

Charity name	Action for Wellbeing	
Other names charity is known by	N/A	
Registered charity number (if any)	1179365	
Charity's principal address	5a Far Close Drive	
	Arnside	
Postcode	LA5 0BG	

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	Alice Halford	Chair	Appointed - 09/12/2018 – present day	
2	Susan Parry		Appointed - 21/08/2019 – present day	
3	Kate Sykes		Appointed – 06/11/2020 – present day	
4	Pat Gardner		Appointed - 21/08/2019 – Retired – 03/11/2020	
5				
6				
7				
8				

Name of chief executive or names of senior staff members (Optional information)

Fredrika Buchanan - Director

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Asked to attend meetings and then elected

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.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

1. To preserve and protect the physical and mental health of those with suicidal ideations, those who self-harm with a view to ending their own lives, those people bereaved by suicide and those caring for people with suicidal ideations through such support as deemed appropriate; and
2. To advance the education of the general public in areas relating to the preservation of mental health, wellbeing and recovery by the provision of advice, workshops, support groups and newsletters - in particular in relation to suicide prevention.



Registered charity 1179365

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)

Action for Wellbeing exists to reduce the number of suicides in South Cumbria and North Lancashire and to provide support to those considering suicide, and to those bereaved by suicide.

- We believe that one suicide is one too many.
- We are a registered charity that exists to reduce the number of suicides in South Cumbria and North Lancashire.
- We provide direct, individualised support to those experiencing suicidal thoughts and feelings, to those bereaved by suicide, and those otherwise impacted by suicide in any way.
- We have a dedicated team of volunteers and trustees who each have their own unique experience of suicide.

Public Benefit:

- The trustees and Volunteer Manager have ensured that all staff and volunteers are recruited and trained in Safeguarding, Mental Health Awareness Training, Applied Suicide Intervention Skills Training and any other training and supervision deemed necessary.
- Prior to appointment, all staff and volunteers undertake an enhanced DBS check. Staff and volunteers undertake professional supervision on a regular basis.
- Beneficiaries are referred to Action for Wellbeing in a variety of ways: self-referral, from local Community Mental Health Assessment and Recovery Teams, from GPs, other third sector organisations and from family and friends.
- The services of Action for Wellbeing are advertised locally through social media, at GP surgeries, other charities in the area and through word of mouth.
- Due to Covid 19, support has been provided via the telephone. Occasionally, client and volunteers have met outside for a socially distanced dog walk.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main
achievements of the charity
during the year**

Section D – Achievements and Performance

In January 2020, our pilot project, Action for Engagement, commenced, for which we received £10,000 from The National Lottery, Reaching Communities Fund.

As a result, we have supported a total of 12 clients directly in 2020. 50% of those partnerships have been operational for over 6 months.

Our clients were referred from a variety of sources:

Local GP

Community Mental Health Team

Social Prescriber

Other Third Sector Organisations

All of our clients appreciated the support from our wonderful team of volunteers

A formal client and volunteer participation review and evaluation of Action for Engagement will be conducted in January 2021.

From September – December 2020, we recruited a Volunteer Manager, Helen Mason. She has been instrumental in ensuring that we have a fully trained team of volunteers ready to work with clients during 2021.

Section E Financial review

Brief statement of the charity's policy on reserves

We aim to have 6 months running costs of 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

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Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Alice Halford	
Position (eg Secretary, Chair, etc)	Chair	
Date		



CHARITY COMMISSION
FOR ENGLAND AND WALES

Action for Wellbeing

1179365

Receipts and payments accounts

CC16a

For the period
from

01/04/2020

To

31/03/2021

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Grants and large donations	-	4,000	-	4,000	20,000
Small donations	1,861	-	-	1,861	-
JustGiving	1,758	-	-	1,758	110
Community Fundraising	12	-	-	12	6,418
DBS Fees	180	-	-	180	21
Cash donations	145	-	-	145	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	3,956	4,000	-	7,956	26,549
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	3,956	4,000	-	7,956	26,549
A3 Payments					
JustGiving Fees	216	-	-	216	272
Community Fundraising	43	-	-	43	890
DBS Fees	200	-	-	200	154
Wages & Expenses	13,624	-	-	13,624	5,189
Training	101	-	-	101	287
Insurance	276	-	-	276	262
Administration	1,005	-	-	1,005	352
	-	-	-	-	-
	-	-	-	-	-
Sub total	15,465	-	-	15,465	7,406
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	15,465	-	-	15,465	7,406
Net of receipts/(payments)	- 11,509	4,000	-	- 7,509	19,143
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	- 11,509	4,000	-	- 7,509	19,143

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank	-	-	-
		-	-	-
		-	-	-
	Total cash funds	8,965	2,000	-
	(agree balances with receipts and payments account(s))	Agreement Error	Agreement Error	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Alice Halford		