

## Trustees' Annual Report for the period:

From	Period start date			To	Period end date		
	01	04	2023		31	03	2024

## 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	Vice Chair	Appointed - 09/12/2018 – present day. Retired as Chair – 07/03/2022	
2	Kate Sykes		Appointed – 06/11/2020 – present day	
3	Fredrika May	Chair	Appointed – 07/03/2022 – present day	
4	Angela Jeffery		Appointed – 03/11/2021 – 31/03/2024	

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

Fredrika Buchanan – Chair

## Section B Structure, governance and management

### Description of the charity's trusts

Type of governing document

Constitution



Registered charity 1179365

(eg. trust deed, constitution)

How the charity is constituted  
(eg. trust, association, company)

Trustee selection methods  
(eg. appointed by, elected by)

Charitable Incorporated Organisation

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**

**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**

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.

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.



Registered charity 1179365

issued by the Charity  
Commission on public  
benefit)

- 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:

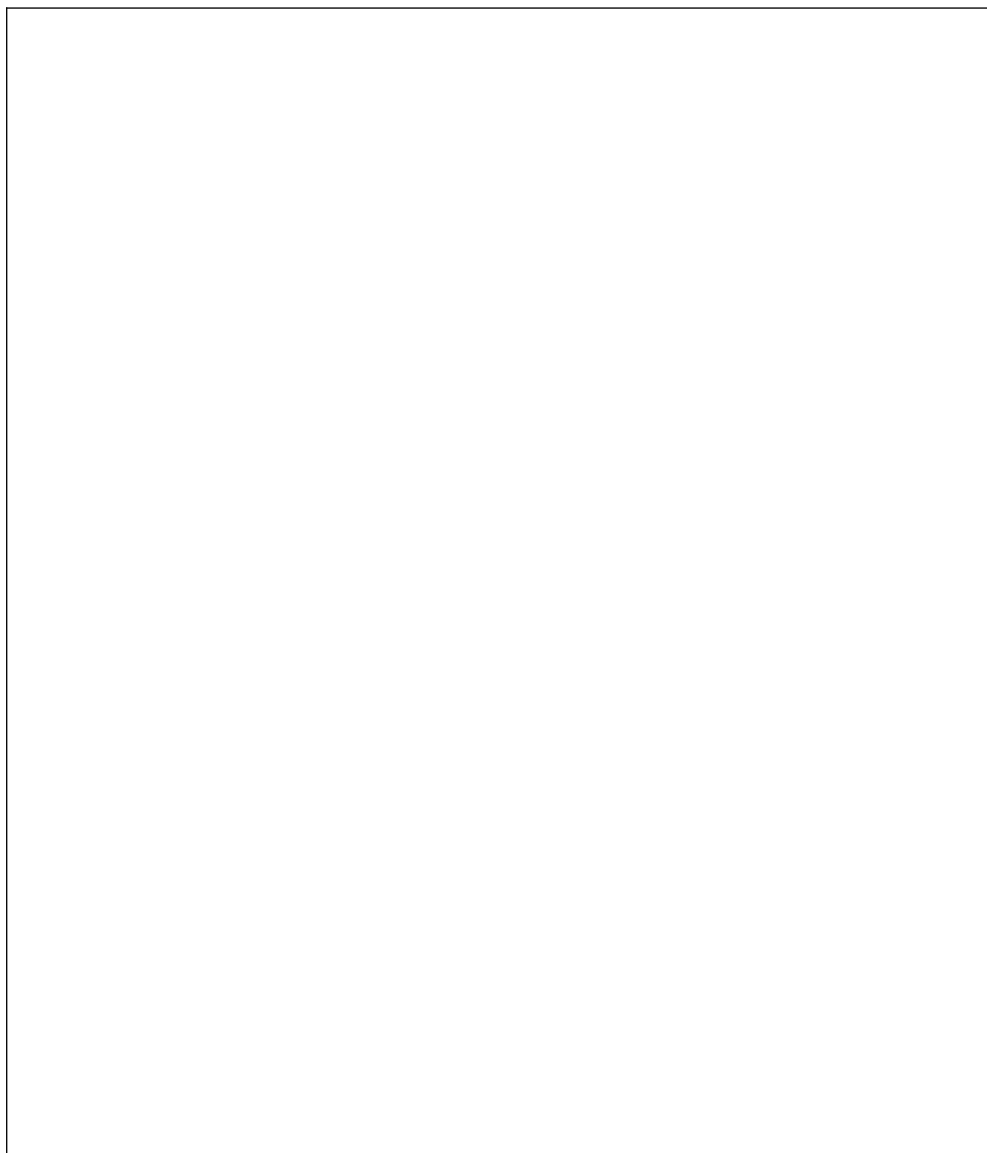
- The trustees and Volunteer Manager have ensured that all staff and volunteers are recruited and trained in Safeguarding, Mental Health Awareness Training, Applied Suicide Intervention Skills Training and any other training and supervision deemed necessary.
- Prior to appointment, all staff and volunteers 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.

#### 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**

- We have continue to support individuals experiencing suicidal ideations who reside in South Cumbria and North Lancashire.
- We offer face to face support. Volunteers and clients meet at the client's homes, go on walks, meet at cafes or offer support via telephone or via text messaging.
- We have raised £25,000 towards our Respite House. This money has been raised through a variety of ways: music events, coffee mornings, sponsored skydiving and marathon runs.

## 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**

<b>Signature(s)</b>	F May	
<b>Full name(s)</b>	Fredrika May	
<b>Position (eg Secretary, Chair, etc)</b>	Chair	
<b>Date</b>	12/08/2023	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

**Action for Wellbeing**

No (if any)

**CC16a**

## Receipts and payments accounts

For the period  
from

Period start date  
4/1/2023

To

Period end date  
3/31/2024

### Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
<b>A1 Receipts</b>					
Grants and large donations	1,590	-	-	1,590	700
Small donations	163	-	-	163	30
JustGiving	288	-	-	288	2,134
Community Fundraising	-	-	-	-	3,422
DBS Fees	-	-	-	-	20
Cash donations	-	-	-	-	3,073
Misc	-	-	-	-	2,505
	-	-	-	-	-
<b>Sub total</b> (Gross income for AR)	<b>2,041</b>	<b>-</b>	<b>-</b>	<b>2,041</b>	<b>11,884</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>2,041</b>	<b>-</b>	<b>-</b>	<b>2,041</b>	<b>11,884</b>
<b>A3 Payments</b>					
JustGiving Fees	216	-	-	216	216
Community Fundraising	100	-	-	100	2,466
DBS Fees	30	-	-	30	20
Wages & Expenses	-	-	-	-	-
Training	-	-	-	-	96
Insurance	276	-	-	276	276
Administration	384	-	-	384	646
Misc	-	-	-	-	2,500
	-	-	-	-	-
<b>Sub total</b>	<b>1,006</b>	<b>-</b>	<b>-</b>	<b>1,006</b>	<b>6,220</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>1,006</b>	<b>-</b>	<b>-</b>	<b>1,006</b>	<b>6,220</b>
<b>Net of receipts/(payments)</b>	<b>1,035</b>	<b>-</b>	<b>-</b>	<b>1,035</b>	<b>5,664</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>1,035</b>	<b>-</b>	<b>-</b>	<b>1,035</b>	<b>5,664</b>

## 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		-	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>24,887</b>	<b>-</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	Agreement Error	OK	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	