

**Epsom RDA**

**Annual Report and Accounts**

**For the year ended 31<sup>st</sup> March 2024**

## Vision & Objectives

Epsom RDA's vision is to improve health and well-being through the therapeutic power of horses.

We are a thriving charity providing therapy, fun and achievement for nearly 200 disabled participants delivered by a team of over 150 volunteers and our own herd of ponies. We hold riding sessions every day; each one is unique in terms of the people we support, and coaching is adapted to the needs of each participant.

The therapeutic benefits of interactions with horses are well recognised. Riding helps exercise and strengthen muscles, mobilises joints, and helps participants develop their balance, independence, and sensory perception. Being able to spend time caring for horses also has a positive impact on confidence levels, relationship building, and communication skills be it for riders or our team of dedicated volunteers. Each session, whether it is riding or learning about caring about horses, is planned to encourage our participants to enjoy themselves, and from that enjoyment gain emotional, social, educational, and physical benefits.

Our over-arching ambition for the coming year is to increase the number of people we support, broaden our offer and increase our impact. We will do this by offering more opportunities to ride for people on our waiting list as well as developing more non-ridden activities including pony care and hippotherapy.

Our goal is to ensure that even more disabled people benefit from the therapeutic power of horses.

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## **Chair Foreword**

Our riders enjoyed huge achievements in 2023. It was a joy to celebrate the success of so many at the Annual Awards held in November at Epsom Downs Racecourse. Over 50 trophies, cups and certificates were awarded to our riders which marked their achievements in dressage, stable management and horse care. Our volunteers were also honoured at the event with prizes awarded in terms of going 'over and above', success in fundraising and events as well as long and dedicated service to Epsom RDA.

2023 also brought challenges with most of our herd suffering with a liver disorder. Thanks to the efforts of our pony welfare team and session leaders, most of our herd were showing signs of recovery by the end of 2023-24. With the perseverance, dedication and teamwork that Epsom RDA is known for, we were able to minimise disruption for most of our riders and continue to deliver therapy and fun throughout 2023.

Our fundraising events have gone from strength to strength as we opened our doors to the wider community for both the Open Day in September and our Carols at the Stables in December. As well as raising funds for Epsom RDA, our riders were able to show their talents by performing dressage tests at the Open Day and a nativity play at Carols at the Stables. Both events were real highlights; thank to all the riders, volunteers, parents, carers and supporters that made our events so enjoyable.

Challenges remain in terms of our waiting list, with many more people wanting to ride with us than we have places available. Despite considerable effort and progress on reducing the waiting list, we were not able to re-open it in 2023 and our efforts to offer therapy to more of those that need it will continue in 2024.

Thank you to all of you that have made Epsom RDA such a worthwhile and enjoyable place to be for our riders and participants over the last year. From session leaders and helpers to gardening, fundraising, pony welfare, maintenance, training, IT and admin teams; without you none of our achievements would have been possible. Thank you also to the individuals, volunteers and families of our riders that have generously donated funds this year.

I am looking forward to delivering even greater outcomes for our riders and participants over the coming year; thank you for being a part of it.



**Laura Hales - Chair**

## Participants

In 2023-2024 we delivered 2,411 sessions of therapy for 224 people.

This is a great achievement but also something we wish to continue to improve upon.

During 2023-24 we took the decision to close our waiting list to update and move the list to a new database. Everyone on the list was contacted, details confirmed along with the ongoing desire and suitability to be on the waiting list.

Following the review, we have 55 people on our waiting list wanting to ride or participate in our sessions, for whom we currently do not have places available. The health problems that our herd experienced during 2023-24 has meant that we have not been able to offer places to as many participants as we would like this year but we hope this will pick up as our herd returns to full strength.

In the final quarter of 2023-24, following the waiting list review, we launched a new participation group. Consisting of riders, parents of riders and volunteers, the participation group aims to develop opportunities for existing riders and develop groundwork activities for non-riding participants, ensuring that as many participants as possible can benefit from therapy through horses.

## Competition success

We were pleased to offer our full competition programme this year which started out with Epsom RDA's longstanding Harold Newton Dressage Competition in March. The ten highest placed riders went on to compete at the RDA Southeast Regional Dressage Competition at Hickstead in May. Seven of our ten



riders went on to qualify for the RDA National Championships at Hartpury in July. The RDA National Championships is the biggest of its kind in the world for disabled horse riders with over 350 participants taking part. We were delighted to take seven riders plus one arts and crafts competitor. Five of our competitors were placed in the fields of dressage, countryside challenge and arts and crafts. We are extremely proud of all of our riders, all of whom did extremely well do qualify in what is a highly competitive event.

## Hippotherapy

In 2023 we started offering Hippotherapy sessions. These sessions are delivered by the Saturday Session Leader, RDA Coach and Occupational Therapist, Kate El Bizanti, who has undertaken post-graduate training to provide therapy

using Hippotherapy techniques. Kate established a hippotherapy team, arranging RDA and specialist training for both the human team and the equine! The first pilot session was undertaken in June 2023 and in the Autumn term Kate and her team were able to provide four children with up to eight weekly intensive therapy sessions, with some amazing feedback. The role of Hippotherapy equine is a specialist one and was skilfully fulfilled by Taffy; unfortunately, with the illness throughout the herd, we have been unable to undertake Hippotherapy sessions in early 2024, but we hope this offer will be back up and running as our herd continues to recuperate.

## Volunteers

Our wonderful volunteers continue to be the backbone of all we do. As a 100% volunteer managed and staffed charity, we literally couldn't do it without them.

We were delighted to be able to acknowledge the commitment and achievements of a few of our special volunteers during our Annual Prize Giving in November. We presented Over and Above Awards to several volunteers in recognition of them taking on far more than we normally ask of volunteers. This included managing the recruitment of new volunteers, being part of the training team and the team responsible for revitalising the sensory track, fundraising and events organisation, all round dedication (fixing leaks, broken pipes and all the jobs no-one else notices) and supporting corporate volunteer days.

To support our volunteers, we have delivered full stage one and two training sessions as provided by our training team provide annually. In addition, this year we have rolled out a series of extra training sessions. In 2023-24 we hosted special lectures on rider biomechanics, equine behaviour and an equine chiropractic demonstration.



We aim to keep recruiting volunteers; we still need more help with maintenance roles and have a couple of trustee positions to fill. In return for their hard work, we aim to continue to ensure that our excellent volunteers receive the recognition and training they deserve and require.





## Horse and Ponies

This year we have successfully purchased and settled in three new horses to the herd. Griffin, Millie and Blue arrived in quick succession during the summer months and quickly became part of the Epsom RDA team, all taking to their new jobs well. These additions took the total herd to 15, although Tandi is currently on loan for training to drive with a view to re-homing her in future.

The first few months of 2024 were challenging with most of the herd affected by a liver disorder. The pony welfare team worked closely with the vet and forage suppliers to eliminate the source of the issue and to reverse the effects, however, this limited our ability to provide a full programme of riding and events for participants during the first few months of 2024 whilst the affected ponies have been on light duties.

## Grounds & Property

After an enormous amount of work from our expanded gardening and maintenance team, we were delighted to open our refurbished sensory track and garden at our Open Day in September 2023. The purpose of the sensory track is for our riders to experience hacking out



by interacting with a range of stimuli including a sand track, gates, hills, woodland, trees and flowers. The sensory track is extremely popular with our riders, giving them the opportunity to enhance their riding skills in an enriching and safe environment.



Many thanks to the team that has worked so hard to make the sensory track a really special place for our riders.



We hosted a number of companies for corporate volunteering sessions during the spring and summer months. These included SGN, Zoetis, Nuffield Health, Blueprint Partners, ICM Investment Management, University for the Creative Arts (UCA) and Epsom College. The corporate volunteer days are a mutually beneficial in providing us with labour to keep our site well maintained as well as providing valuable team building exercises for companies taking part.

We are particularly grateful to SGN who have supported us for a number of years with some of the more difficult jobs such as digging, laying cables and running water pipes. In summer 2023 the SGN team made a significant dent in the sensory track work, clearing several layers of stone and replacing it with a new surface. Our riders, ponies and volunteers are extremely grateful.





Our maintenance team continue to do a fantastic job of keeping the Epsom RDA grounds safe and in excellent working order. The particularly wet weather has been challenging this winter and we are enormously grateful to the team for making repairs and delivering preventative maintenance.

Finally, we have made a number of small investments in our property this year including new fencing, an asbestos survey and remedial works for our indoor school, installation of new lighting for the yard and fitting of mud slabs to address the wet and muddy conditions in the fields.

## **Fundraising and Events**

Our events fundraising has gone from strength to strength this year. Our highly committed and imaginative fundraising and events team delivered several well attended and extremely popular events including a coronation picnic, summer open day and Christmas Carols at the Stables.

Our open day in September 2023 was a real jewel in the crown of our events programme where we hosted over 1,000 people. Volunteers from every session were involved in making the event a success, as well as non-session volunteers from our maintenance, gardening and IT teams.

Highlights included dressage tests delivered by our riders who competed at the National Championships, a display from our own schooling team as well as the grand opening of our newly refurbished sensory track by actor and disability advocate Lenny Rush.

We raised over £2,000, all of which is thanks to the volunteers who baked, staffed the bar, ran the tombola & raffle, managed the parking and much more. Thank you to everyone involved.



In addition to these events, the team has also delivered a number of educational events and lectures delivered by guest speakers including Sarah Sjöholm Patience and Caroline Baldock. As well as raising funds through ticket sales to the public, these events are also proving to be popular training opportunities for our volunteers. Likewise, our regular pole clinics and dressage tests are proving popular with the public and serve to both increase our income and raise our profile in the community.

We are also continually thankful for the donations we receive from various organisations and individuals.

## **Health and Safety**

We continue to review our processes and procedures to endeavouring to follow best practice in all of our health and safety measures. This year we have started to introduce Personal Emergency Evacuation Plans for all our participants as part of our Fire Safety Policy. The teams have been working hard to collate this information and understand how to use it.

## **Communications**

The aim of our communications continues to be twofold;

1. To encourage external support for our activities; from fundraising to recruitment, and to tell the wider story of what we do and its impact.
2. To see that our volunteers are kept up to date with what is going on, ensuring they feel part of one Epsom RDA community.

In July, we appointed a new marketing trustee. Her focus has been to bring creativity and consistency to our brand and messaging across all communication channels, as well as develop marketing content in order to widen awareness of Epsom RDA.

Working together with our stakeholders, marketing content has been produced for both print and online; the latter enabling our stakeholders to readily share in real-time, via word-of-mouth. To support the effective dissemination of online content, a social media content planner has been produced, which weaves in our posts and stories and their relevance to national awareness days and key events. Flyers for both the recruitment of volunteers and trustees have been produced, as well as volunteer and participant case studies for print and social media channels. Posters have been developed for the yard to highlight costs and where funds are allocated. This has been to show both existing and potential supporters the efficient and effective way donations are used, as well as why funds are so vital to the work we do.

We have also widened our reach to develop relationships within the community e.g. with local residents' groups and organisations such as u3a, to educate and inform them of what we do, simultaneously highlighting volunteer and trustee vacancies. Donations from local businesses, including Waitrose, Banstead and Epsom Cross Fit have also provided content highlights for our communications channels. We continue to work with Epsom Downs Racecourse, who support us through the use of their venue for our AGM, as well as supporting us financially through entry fee donations from The Derby Walk 2024.

In collaboration with the fundraising team, opportunities for promoting and raising funds for Epsom RDA have included an Open Day and Manure Sale. Both were promoted on and offline, in particular using our social media channels that have continued to grow in followers and reach. A particular highlight was the very successful tack sale in January, which saw attendees come as far as Ascot and take over £600.

Internal communications continue to take the form of a monthly update from the trustees' email to all volunteers, a noticeboard at the stables, as well as more regular posts on social media. Volunteer involvement in social media content and case study development ensures that their contributions are valued and their impact shared with a wider audience.

**EPSOM RDA VOLUNTEER SPOTLIGHT**



**Meet Carol**

Carol has been a volunteer for nine years, a qualified group coach for two years and is also involved in various committees, including fundraising.



*I've made some great friends for life...*

**“** I think it's wonderful that as volunteers we're such a diverse group ranging from teenagers to retirees. **”**

What else is special about Epsom RDA?

Add into the mix our gorgeous horses, an amazing group of volunteers and beautifully kept grounds and there's no place I'd rather be on a Saturday afternoon.




**THANK YOU**  
**WAITROSE & PARTNERS, BANSTEAD**

You have raised £666 for our charity! The money donated will continue to support people like Theo, who benefit from the therapeutic power of horses. £666 can...

- Contribute to 33 riding sessions
- Feed 6 ponies for a month
- Provide hoof trims for 22 ponies

Epsom RDA provides both children and adults with physical and learning disabilities, the opportunity to improve their health and wellbeing through the therapeutic power of horses.


Run entirely by volunteers, our charity relies on grants and donations to be able to pay for the costs of looking after our ponies and maintaining our site.

Our generous supporters help make a difference to over 200 disabled people every year.

Find out more at [www.epsomrda.org.uk](http://www.epsomrda.org.uk)




Epsom RDA is a registered charity (number 1208062) and a member group of the National Riding for the Disabled Association.



**TACK & TABLE TOP SALE**  
**FRIDAY 9TH FEBRUARY 7-9PM**  
**FREE ENTRY FOR BUYERS**  
**SELLERS - £10 PER TABLE**

**FREE ON-SITE PARKING**



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**TACK & TABLE TOP SALE**  
**FRIDAY 9TH FEBRUARY 7-9PM**  
**FREE ENTRY FOR BUYERS**  
**SELLERS - £10 PER TABLE**

VISIT [WWW.EPSOMRDA.ORG.UK/EVENTS](http://WWW.EPSOMRDA.ORG.UK/EVENTS) FOR MORE INFORMATION



**CALLING ALL GARDENERS!**

**MARCH MANURE PROMOTION**  
**3 FOR 2**

**£6 / bag**

**SATURDAY 30TH MARCH**  
**10AM - 1PM**

**ST EBBA'S FARM | HOOK ROAD |**  
**EPSOM | KT19 8QW**



**WELL-ROTTED, BAGGED & LOADED INTO YOUR VEHICLE**

**YOU FEED YOUR GARDEN**  **WE FEED OUR PONIES**

**ALL SALES ARE IN AID OF EPSOM RDA**  
**£6 CAN BUY OUR PONIES A BALE OF HAY**

Visit [www.epsomrda.org.uk/events](http://www.epsomrda.org.uk/events)

Epsom RDA is a registered charity (number 1208062) and a member group of the National Riding for the Disabled Association.

Planning for the Future

2024 will see continuation of our work in terms of delivering on our strategic objectives which are to:

- To deliver a varied and worthwhile experience to enhance health and well-being; **this includes ensuring participants have activities suitable to their level and opportunities to progress, broadening our offer to include non-ridden activities and improving the volunteer experience;**
- To maximise the number of participants able to benefit from being with horses; **this includes improving the management of our waiting list, maximising the number of riders at each session and investing in volunteer recruitment, training and retention;**
- To be an excellent organisation that is financially robust with a mixed revenue funding model; **this includes developing a fundraising strategy, ensuring that we meet our obligations on governance and health & safety, communicating effectively and committing to being a diverse and inclusive charity.**



## Financial Review and Accounts

The financial year ended 31st March 2024

### Overview

For the year ended 31st March 2024 the charity showed an annual operating surplus of c. £3.4k (c.£31k surplus in 2022-23). These figures do not include any income or expenditure related to the Future Strategy which is classed as non-operating expenses and income. This comprised total operating income of c.£97k (c.£98K in 2022-23) with operating expenses of c.£94k (c.£67k in 2022-23). Income has stayed mainly static since last year whereas costs have seen a significant increase. The cost increases are seen mainly in the rising cost of feed (recognising we also have increased herd numbers), pony care where we have had a rise in vet costs and in major works.

In addition, we have received a sum of £25K from a legacy which the trustees have agreed to hold in the Future Development scheme towards new infrastructure and projects to move the charity forward which could include infrastructure projects such as building a new mounting block or strategic investments in rider experience, volunteer development or equine well-being. The total surplus for the year was c.£28k (against a loss of c.£58k in 2022-23).

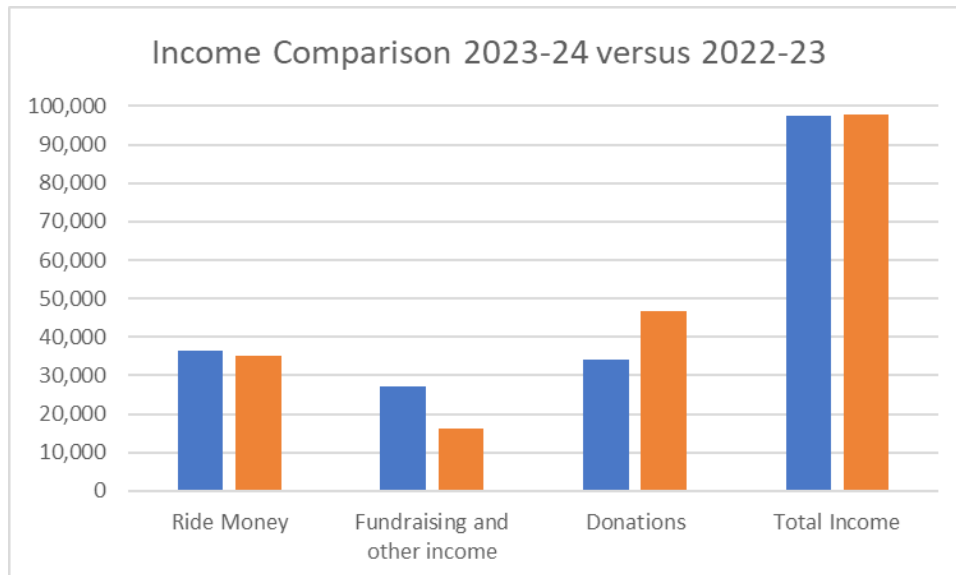
### Income

The trustees took the opportunity to review the fee level for 2023-24 and agreed to hold it at £10 against a cost per ride of £30 (based on 2022-23 costs). Our aim is to cover the cost of running the herd (less the cost of buying new herd members), however, due to rising pony care and feed costs the rise income of c.£36k was slightly less than the cost of maintaining the herd at c.£38k. The remaining cost of running the charity relies on donations and our regular income from livery, use of the school and letting space to Austin & Jenkins builders. The current cost of delivering a session for a participant, be that riding or a pony care session, is c.£41.

The total income for the year is standing at c.£97k which is broadly the same as the c.£98k in 2022-23. Donations for 2023-24 were lower at c.£34k against 2022-23 which were c.£47k. Events during the year netted an additional c.£6k a good increase against a net loss last year. This reflects the work the events team have put into getting a regular programme of events as well as the Open Day and Carols at the Stables. Income has also benefitted from a rise in interest rates during the year with interest at c.£2k higher than the previous year.



Tack sales continue to attract good levels of interest contributing c.£4k in 2023-24. Donations of goods for the tack sales remains strong and the trustees agreed to fund the base for a shed donated by John Jenkins, a local builder, which allowed us to increase our storage space at the yard to enable the team to have a permanent home for tack sales. We also replaced the asbestos roof on the old garage which also houses tack. The cost of this was covered by the income.



2023-24	2022-23
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We have also received support from generous donors including:-

- Annette Emery Gemstone Jewellery who continues to make and sell jewellery with the profits used to buy items we need for our ponies
- Banstead Waitrose
- Epsom CrossFit
- Epsom and District Caledonian society
- Epsom Fireworks
- Ewell and Worcester Park club 41
- Former Participants who continue to donate monthly
- Friends, family and the Thursday session who collected in memory of Teresa Jones a previous volunteer
- Graham Ball for a donation towards the purchase of Griffin in memory of his wife Lynda Ball
- Harold Bell Infiel Charity
- HOGGS golf club

- Jo Hancock for donating in memory of her father followed by a further donation towards our vet's bills
- John Lewis
- Papillon School
- Reday for their contribution towards the cost of Hartpury
- Rotary Club of Ewell for their contribution towards our AGM and Prizegiving
- Peter Clarke for the donation of the Mary Clarke award for the most improved rider on the Tuesday session to be awarded annually at the Prizegiving
- St Mark's and Mitcham Buffalos
- The Thompson Family Trust for their ongoing regular monthly donation and the payment of Moss's vet's bills
- Sunray Ladies Club

Of course, we are also grateful for all the donations we receive from volunteers, friends and relations of participants, the local allotments and gardeners who donate when collecting our quality manure, hot chocolate reindeers and pocket money as these unrestricted funds go directly to supporting the upkeep of the herd and their home to the benefit of our participants. We are also grateful for the volunteers who never claim expenses, donate carrots and cotton wool pads and organisations who give us time and labour.

## **Expenditure**

The upkeep of the herd forms a major part of our outgoings. This year our herd (15 ponies at year end – 14 of which are part of our active herd with Tandi being on a loan for re-schooling) cost c.£39k (c.£25k in 2022-23 when we had 11 ponies) which includes expenses for feed, hay, farriers, dentist, vet, and various equipment including our new ergonomic bridles and other essential tack. The increase in expenditure is due the rising costs of hay, feed and services (we remain grateful for those services who have held their prices lower for ourselves). A further c.£7k was donated by the organisers of the Epsom fireworks, friends of Teresa Jones, Annette Emery Gemstones, The Thompson Family Trust, Jo Hancock and an anonymous donation all of which was used to purchase new equipment or towards pony care costs. This excludes the cost of purchasing new herd members. (2022-23 the cost of purchases was c£12K in 2023-24 this was c.£16k) which includes the return of c.£9k in funds against a pony purchased in 2022-23 and a donation of £2,400 towards the purchase of Griffin from Graham Ball.

The average cost of keeping a herd member during the last year was £2,720, an increase from the previous year where it was £2,150 per annum. This is the equivalent of £52 per

week which is a c.27% increase on the prior year. So, a donation of £6 can buy a bale of hay, £35 pays for a pony to be visited by the farrier (with thanks to our farrier who gives us a discount) and £25 pays for a visit from the equine dentist.

Our next expense is in keeping the site safe, secure, and well maintained. The cost of maintaining the buildings and grounds in 2023-24 c.£29K (2022/23 was c. £22K with an additional c.£96k for the car park build)

Other expenses include insurance, utilities, training, security, and general office expenses. All essential to our operation but the rise for 2023 –24 reflect the general economic position as all costs have increased during the year. To mitigate this the trustees have ensured all contracts for maintenance of the site have been reviewed to ensure best value for money. As always, we are grateful to Steve and the maintenance team for all their hard work keeping our site safe and well maintained. Also, to the gardening team for maintaining the sensory track and general garden spaces.

## **Reserves**

As a charity we are in the fortunate position that we have always been prudent with our use of incoming funds versus expenditure. At the end of 2023-24 we had c £239k cash in hand in various bank accounts (c.£211k in 2022-23).

The Trustees have several ringfences in place on this money:

### **Future Strategy Fund (formerly Indoor School Project) - £25k in (2022-23 £0)**

Trustees have re-prioritised the updating and improving of the site so we can have dedicated fund raising and maximise our service provision by investing in smaller projects. The £25k legacy received during the year has been ringfenced to this fund and work is currently underway to determine the possibility and cost of redeveloping the current mounting block.

### **Minimum Reserves as required by the Charity Commission - £120K**

All charities have a statutory duty to set minimum reserves to ensure their continued status as a going concern. Our minimum reserves were set some years ago to be held at a year running costs. The trustees reviewed these during 2023 and agreed that £120k was still the appropriate amount to hold. These funds are there for dire emergencies and can only be utilised for general running costs should our status change and we need to use them to remain a going concern.

**Funds available for use as at 31<sup>st</sup> March 2024– c.£64k (in 2023-24 c.£91k)**

This is the cash we have in hand that we can use to keep our herd fed and well, to maintain our land and buildings and to make improvements for the safety, wellbeing, and enhancement of our offer to our participants. We also keep a further amount to funds in the designated funds account mentioned above for major works to ensure our site is safe and secure for our herd and our participants.

During 2023-24 the Trustees delegated authority to the Finance, Performance and Governance Committee (FPGC) to manage the running of the charity by allocating budgets to designated Trustees who have the responsibility for property management, health, safety and cleaning, the upkeep of the herd and general running costs (e.g., insurance, rubbish removal, utilities, professional services including the bank account, audit fees etc). FPGC have full authority to spend within their budgets and there is a procurement policy which was agreed by the Trustees which gives us a framework to ensure we spend wisely and get the best value for money we can. This is all part of our enhanced Governance and has continued to work well. Towards the end of 2023-24 the number of trustees reduced so the committee has temporarily been suspended with decisions reverting back to the trustees under the same terms as FPGC. The intention is to restart the committee once we have filled our trustee vacancies.

In addition, Epsom RDA owns:

- The freehold of St Ebba's Farm, which cost £84,657 (inclusive of legal fees).
- Equipment including two tractors, a trailer, three harrows, a grass cutter and sundry other tractor attachments,
- A hand operated motor mower, a strimmer and various workshop tools, competition fences, poles, and games
- equipment with an approximate current value of £15,000 (2023 - £15,000)

## **Notes to the accounts**

### **Restricted Funds**

We have had £34,337 added to our restricted funds during the year, of which £25k is for the strategic improvement fund. The remainder of the £9,337 added has been utilised during the year.

### **Designated Funds**

The Designated Fund is £40,880(closing balance as at 31st March 2023 £44,595). The trustees added a designated sum of £15,000 (total of £13,207 spent in the year from

designated funds and £2,400 from restricted funds and netted against this is £8,700 refunded in April 2023 against a purchase included in the 2022-23 accounts) towards the purchase of new herd members and the costs related to said purchases. The remaining £14,594 was used to provide maintenance to the site including tree removal, removal and replacement of an asbestos roof, the provision of a new sewage pump and other essential site work. This designated fund represents amounts set aside by the trustees out of the general fund to meet the cost of future improvements to the property and the purchase of new herd members. The interest on the balance in the Fund provides income for general purposes to help meet the charity's running expenses.

The following projects have been identified by the Trustees, for implementation as and when funds become available: -

- To purchase equipment necessary for maintaining the estate.
- To maintain or expand our herd which, although it has been added to over the past year, will need to be expanded further as participants return and in recognition of the age of the some of the current herd members.
- Future Strategy initiatives have been identified and the trustees have agreed these will be funded through specific fundraising and the legacy received during 2023-24.

During the year the Finance committee carried out work as held on the capital project list. This included:

- essential maintenance work needed to ensure the safety and upkeep of our buildings and ground
- provision of equipment for the herd and participants

as well as a list of other projects where donors require a specific use for the funding being offered.

**EPSOM RIDING FOR THE DISABLED ASSOCIATION  
INDEPENDENT EXAMINER'S REPORT**

**FOR THE YEAR ENDED 31<sup>st</sup> MARCH 2024 TO THE TRUSTEES**

I report on the accounts of Epsom Riding for the Disabled Association for the year ended 31 March 2024, which are set out on pages 4 to 8.

Respective responsibilities of 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, following the procedures laid down in the General Directions given by the Charity Commissioners, (under section 145(5)(b) of the Charities Act) and to state whether particular matters have come to our attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. 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 any 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 examiner's statement**

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

(a.) 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 to comply with the accounting requirements of the Charities Act have not been met; or

(a.) To which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

T W Slater ACA,CTA  
Harmer Slater Limited  
79a High Street

Teddington  
Middlesex TW11 8HG

31<sup>st</sup> May 2024

**Receipts and Payments Accounts**  
**Income and Expenditure**  
**Epsom Riding for the Disabled Association inc Carriage Driving**  
**For the year ended 31 March 2024**

	General Purposes	Restricted Funds	Designated Funds	Total 2024	Total 2023
Income	£	£	£	£	£
Ride Money	35,811.00			35,811.00	35,238.00
Livery Fees	5,640.00			5,640.00	5,450.00
Use of School	2,400.00			2,400.00	1,875.00
Sale of ponies	0.00			0.00	0.00
Interest income	2,498.00			2,498.00	617.00
Total Regular Income	46,349.00			46,349.00	43,180.00
<hr/>					
Gross Income					
<hr/>					
Plus Other Income					
Donations	12,617.00			12,617.00	22,300.00
Online donations	12,181.00			12,181.00	18,696.00
Ring fenced Donations		9,337.00		9,337.00	5,490.00
Tack sale	4,269.00			4,269.00	5,072.00
Events	8,359.00			8,359.00	1,226.00
Adopt a pony	0.00			0.00	0.00
Merchandise sales	0.00			0.00	0.00
Other revenue	3,909.00			3,909.00	2,000.00
Total Other Income	41,335.00	9,337.00		50,672.00	54,784.00
<hr/>					
Total Income	87,684.00	9,337.00	0.00	97,021.00	97,964.00
<hr/>					
Less Herd Upkeep Costs					
Pony care	15,672.00	2,973.00		18,645.00	12,864.00
Pony costs-equipment	4,076.00	2,760.00		6,836.00	1,877.00
Pony feed	12,824.00			12,824.00	9,652.00
Pony purchase	0.00	2,400.00	13,207.00	15,607.00	11,947.00
Pony schooling	1,335.00			1,335.00	785.00
Total Herd Upkeep Costs	33,907.00	8,133.00	13,207.00	55,247.00	37,125.00

<b>Gross Profit</b>	<b>53,777.00</b>	<b>1,204.00</b>	<b>-13,207.00</b>	<b>41,774.00</b>	<b>60,839.00</b>
<b>Expenses</b>					
<b>Cost of running site</b>					
Maintenance of grounds	3,449.00			3,449.00	1,646.00
Repairs & maintenance - building	2,731.00			2,731.00	1,314.00
Light, Power, Heating	1,296.00			1,296.00	1,236.00
Cleaning and sanitary costs	2,209.00			2,209.00	2,920.00
Fuel costs and servicing	699.00			699.00	559.00
Motor vehicle expenses	100.00			100.00	243.00
Gardening	939.00			939.00	834.00
Health, Safety and Safeguarding	54.00			54.00	5,071.00
Insurance	2,733.00			2,733.00	2,283.00
New Works	0.00		14,594.00	14,594.00	5,209.00
Telephone and Internet	481.00			481.00	461.00
<b>Total Cost of Running Site</b>	<b>14,691.00</b>	<b>0.00</b>	<b>14,594.00</b>	<b>29,285.00</b>	<b>21,776.00</b>
<b>Other Running Costs</b>					
<b>Fundraising</b>					
Competition costs	900.00	904.00		1,804.00	524.00
Event costs	2,092.00			2,092.00	2,754.00
Prize Giving costs	333.00	300.00		633.00	0.00
Fundraiser Partner costs	446.00			446.00	216.00
Advertising & Marketing	0.00			0.00	77.00
Communications	0.00			0.00	98.00
<b>Total Fundraising</b>	<b>3,771.00</b>	<b>1,204.00</b>	<b>0.00</b>	<b>4,975.00</b>	<b>3,669.00</b>
<b>Finance and Legal costs</b>					
Audit & Accountancy fees	2,131.00			2,131.00	2,049.00
Bank fees	215.00			215.00	220.00
Subscription costs	235.00			235.00	340.00
<b>Total Finance and Legal cost</b>	<b>2,581.00</b>	<b>0.00</b>	<b>0.00</b>	<b>2,581.00</b>	<b>2,609.00</b>
<b>Training</b>					
Training - coaching and bursary	20.00			20.00	27.00
Training - first aid	840.00			840.00	1,380.00
Staff Training	0.00			0.00	11.00
<b>Total Training</b>	<b>860.00</b>	<b>0.00</b>	<b>0.00</b>	<b>860.00</b>	<b>1,418.00</b>
<b>Other Administrative and Misc costs</b>					
IT Software and consumables	380.00			380.00	295.00
Printing & stationery	173.00			173.00	247.00
General expenses	87.00			87.00	0.00
<b>Total Other Administrative and Misc costs</b>	<b>640.00</b>	<b>0.00</b>	<b>0.00</b>	<b>640.00</b>	<b>542.00</b>
<b>Total Other Running Costs</b>	<b>7,852.00</b>	<b>1,204.00</b>	<b>0.00</b>	<b>9,056.00</b>	<b>8,238.00</b>



<b>Total Operating Expenses</b>	<b>22,543.00</b>	<b>1,204.00</b>	<b>14,594.00</b>	<b>38,341.00</b>	<b>30,014.00</b>
<b>Operating Surplus (Loss)</b>	<b>31,234.00</b>	<b>0.00</b>	<b>-27,801.00</b>	<b>3,433.00</b>	<b>30,825.00</b>
<b>Future Strategy Costs and Income</b>					
Indoor School Project					
Indoor School costs	0.00			0.00	96,487.00
Indoor School funding	0.00	25,000.00		25,000.00	-8,000.00
<b>Total Indoor School Project</b>	<b>0.00</b>	<b>25,000.00</b>	<b>0.00</b>	<b>25,000.00</b>	<b>88,487.00</b>
<b>Total Non-operating Expenses</b>	<b>0.00</b>	<b>25,000.00</b>	<b>0.00</b>	<b>25,000.00</b>	<b>88,487.00</b>
<b>Net Surplus (Loss)</b>	<b>31,234.00</b>	<b>25,000.00</b>	<b>-27,801.00</b>	<b>28,433.00</b>	<b>-57,662.00</b>
<b>Transfer of funds</b>					
<b>Balance at 1st April 2023</b>	<b>141,773.00</b>	<b>0.00</b>	<b>68,681.00</b>	<b>210,454.00</b>	<b>268,116.00</b>
<b>Balance at 31st March 2024</b>	<b>173,007.00</b>	<b>25,000.00</b>	<b>40,880.00</b>	<b>238,887.00</b>	<b>210,454.00</b>



**Receipts and Payments Accounts  
Balance Sheet**  
**Epsom Riding for the Disabled Association inc Carriage Driving**  
**For the year ended 31 March 2024**

<b>Bank Accounts</b>	<b>Opening Balance</b>	<b>Cash Received</b>	<b>Cash Spent</b>	<b>Closing Balance</b>
ERDA CIO current account	34,801.00	89,737.00	91,860.00	32,678.00
ERDA old charity	2,712.00	970.00	0.00	3,682.00
ERDA Virgin	382.00	0.00	0.00	382.00
National Counties Building Soc	96,135.00	1,554.00	0.00	97,689.00
Accessible savings account	74,419.00	28,010.00	0.00	102,429.00
Metrobank savings account	2,005.00	22.00	0.00	2,027.00
Metrobank credit card	0.00	1,728.00	1,728.00	0.00
<b>Total</b>	<b>210,454.00</b>	<b>122,021.00</b>	<b>93,588.00</b>	<b>238,887.00</b>

Receipts and Payments Accounts  
Statements of Assets and Liabilities  
Epsom Riding for the Disabled Association inc Carriage Driving  
For the year ended 31 March 2024

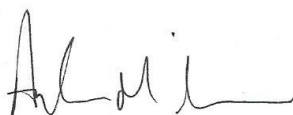
	General Purposes	Restricted Funds (note 1)	Designated Funds (note 2)	2024
	£	£	£	£
Bank Balances at 31st March 2023 held by Epsom Riding for the Disabled (1180061)	141,773.00	0.00	68,681.00	210,454.00

	General Purposes	Restricted Funds (note 1)	Designated Funds (note 2)	2024
Net Receipts/ (payments) in year	31,234.00	25,000.00	-27,801.00	28,433.00
Bank Balances at 31st March 2024	173,007.00	25,000.00	40,880.00	238,887.00

These financial statements were approved by the Trustees on 31st May 2024 and signed on their behalf by:



L Hales  
Chair



A Wilson  
Trustee  
For and on behalf of the Management Committee

**Receipts and Payments Accounts**  
**Notes to the Accounts at 31st March 2024**  
**Epsom Riding for the Disabled Association inc Carriage Driving**  
**For the year ended 31 March 2024**

**1. Restricted Funds**

	Donor	Fund as at 1st April 2023	Received	Spent	Fund as at 31st March 2024
		£	£	£	£
Cost of Griffen (pony)	Graham Ball	0.00	2,400.00	2,400.00	0.00
New saddle for Millie	Teresa Jones memorial	0.00	360.00	360.00	0.00
Ergonomic bridles and new bits	Epsom Fireworks donations	0.00	2,250.00	2,250.00	0.00
Blood tests and vets' bills	Anonymous	0.00	1,000.00	1,000.00	0.00
Hartbury attendance	Reday	0.00	904.00	904.00	0.00
Stubben girths	Annette Emery Gemstones	0.00	150.00	150.00	0.00
Vets bills for Moss	Thompson Family Trust	0.00	1,473.00	1,473.00	0.00
Vets bills	Jo Hancock	0.00	500.00	500.00	0.00
Peter Clark Trophy	Elizabeth Clark	0.00	300.00	300.00	0.00
Strategic improvement fund	Anonymous legacy		25,000.00	0.00	25,000.00
		0.00	34,337.00	9,337.00	25,000.00

**2. Designated Funds**

	£
Opening balance	68,681.00
Additional funding from donations	0.00
Transfer of funds	0.00
Less	0.00
Purchase of new herd	-13,207.00
Pump replacement	-4,560.00
Replace asbestos roof on tack store garage	-2,200.00
Shed base for tack store	-1,620.00

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Fence replacement	-1,007.00
Japanese knotweed treatment	-750.00
Work on oak tree	-1,740.00
Mudslabs for field gates	-1,179.00
Seal asbestos walls in indoor school	-898.00
Lighting for indoor school	-640.00
Total spent	-27,801.00
Closing balance	40,880.00

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**Receipts and Payments Accounts**  
**Notes to the Accounts at 31st March 2024 continued**  
**Epsom Riding for the Disabled Association inc Carriage Driving**  
**For the year ended 31 March 2024**

**3. New Works (Improvements and Equipment) Purchased in year**

<b>New Works (Improvements)</b>	<b>£</b>	
<b>Water pump replacement (shared cost)</b>	<b>4,560.00</b>	<b>(designated)</b>
<b>Replace asbestos roof on store garage</b>	<b>2,200.00</b>	<b>(designated)</b>
<b>Shed base for tack store</b>	<b>1,620.00</b>	<b>(designated)</b>
<b>Fence replacement</b>	<b>1,007.00</b>	<b>(designated)</b>
<b>Removal of rotting trees</b>	<b>1,740.00</b>	<b>(designated)</b>
<b>Mudslabs for field gates</b>	<b>1,179.00</b>	<b>(designated)</b>
<b>Seal asbestos walls in indoor school</b>	<b>898.00</b>	<b>(designated)</b>
<b>Lighting for indoor school</b>	<b>640.00</b>	<b>(designated)</b>
<b>Japanese knotweed treatment</b>	<b>750.00</b>	<b>(designated)</b>
<b>Total New Works (Improvements)</b>	<b>14,594.00</b>	

<b>Equipment</b>		
<b>Saddles</b>	<b>3,399.00</b>	<b>(part restricted)</b>
<b>Girths</b>	<b>196.00</b>	<b>(part restricted)</b>
<b>Ergonomic bridles and bits</b>	<b>2,145.00</b>	<b>(restricted)</b>
<b>Reins, stirrup leathers lead ropes</b>	<b>598.00</b>	
<b>Wheelbarrows for dry waste</b>	<b>124.00</b>	
<b>Field trugs for hay</b>	<b>102.00</b>	
<b>Travel equipment for horses</b>	<b>93.00</b>	
<b>Other equipment costs</b>	<b>179.00</b>	
<b>Total Equipment</b>	<b>6,836.00</b>	

<b>Total new works (Improvements and equipment)</b>	<b>21,430.00</b>	
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## GOVERNANCE

Epsom RDA is currently managed by six elected trustees including the Chair. Within the group there is a wide range of skills and experience bringing well rounded expertise to manage the charity on a day-to-day basis and plan and deliver for the future. We are currently recruiting for three roles.

There have been some changes to Trustees during the year:

We welcomed one new Trustee in August: Louise Jackson joined us as the Communications trustee and has made a big impact by addressing our branding and updating all our social media.

Laura McArthur our secretary stood down in January 2024, David Hart stood down in May 2023 and Ray Lee stood down from his fundraising trustee role in October 2023.

The Board now operates in a hybrid fashion meeting remotely and in person. The Board met eight times during the year and held one strategy meeting. The Annual General Meeting was held on 26th November 2023. Our thanks to the kind support of Epsom Downs Racecourse who once again hosted our meeting.

The Finance, Performance and Governance Committee (FPGC) is chaired by the treasurer and comprises secretary, property trustee, fundraising trustee and 1 other trustee as elected. It continued to meet until January when trustee numbers dropped and it will reconvene once we have filled our vacancies.



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## Safeguarding

Everyone within Epsom RDA has the right to report any issues which cause concern about another person in confidence, this can be done to the appointed Safeguarding Officer or direct to our National body, RDA UK.

At Epsom RDA we have a

- Safeguarding Policy Statement
- Safe recruitment – standardised application form, requirement for two references and disclosure checks
- An appointed Safeguarding Officer who can be contacted by email: [safeguarding@epsomrda.org.uk](mailto:safeguarding@epsomrda.org.uk)

All in the Group are aware of who to contact if there is a safeguarding concern with the details sign posted on our coffee room noticeboard as well as detailed on our website.

All Coaches that run Sessions have a current (within 3 years) safeguarding certificate and are required attend a formal training course provided by RDA UK to renew their certificate.

More information on safeguarding guidelines and policy can be found at [RDA National Safeguarding](#).

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## **Trustees as at 31st March 2024**

Laura Hales, appointed Chair on 2<sup>nd</sup> March 2023

Angela Wilson, Treasurer re-elected at AGM on 26th November 2023. Acting Secretary since 1<sup>st</sup> January 2024

Laura McArthur, resigned on 1<sup>st</sup> January 2024

Liz Clark, Volunteering, appointed 14 February 2022

Rebecca Courtman, Health, and Safety and Safeguarding re-elected 21 November 2021

Jo Lee, Horse and Pony, re-elected at AGM on 26th November 2023

Louise Jackson, Communications trustee joined on 1st August 2023

Ray Lee, resigned as fundraising trustee on 8<sup>th</sup> October 2023

David Hart resigned on 12<sup>th</sup> May 2023

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## Reference and Administration

**Formal name:** Epsom Riding for the Disabled Association

**Charity Registered Number:** 1180061

**Registered Office:** St Ebba's Farm, Hook Road, Epsom, Surrey, KT19 8Q

### Honorary Officers:

Chair – Laura Hales

Treasurer – Angela Wilson

Secretary – Laura McArthur resigned 1<sup>st</sup> January 2024 and the role has been covered by Angela Wilson while we actively recruit

### Objects:

Providing disabled people with the opportunity to ride and/or to carriage drive to benefit their health and well-being in the Surrey / Southeast area.

**A Member** of the Riding for the Disabled Association incorporating Carriage Driving

Registered Company No 5010395 Registered Charity No 244108

### For more information:

Website: [www.epsomrda.org.uk](http://www.epsomrda.org.uk)

Facebook: [www.facebook.com/epsomrda](https://www.facebook.com/epsomrda)

Instagram: [www.instagram.com/epsomrda](https://www.instagram.com/epsomrda)

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Twitter: [www.twitter.com/epsomrda](https://www.twitter.com/epsomrda)

**Enquiries:**

[info@epsomrda.org.uk](mailto:info@epsomrda.org.uk)