



Trustees' Annual Report for the Period

Period Start Date				To	Period End Date		
Day	Month	Year			Day	Month	Year
From 01	07	2022			30	06	2023

Section A Reference and Administration Details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

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	Michael Burke	President	July 2022 to June 2023	Doncaster Went Valley Lions
2	Richard Bailey	Secretary and Interim Treasurer	July-December 2022 (Retired)	Doncaster Went Valley Lions
3	Judith Wild	Secretary	Appointed January 2023 (to June 2023)	Doncaster Went Valley Lions
4	Christopher Wild	Treasurer	Appointed January 2023 (to June 2023)	Doncaster Went Valley Lions
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
NOT APPLICABLE	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
NOT APPLICABLE		

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

Section B Structure, Governance and Management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution & By-Laws of Doncaster Went Valley Lions Club.
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation (CIO)
Trustee selection methods (eg. appointed by, elected by)	Club trustees are selected through a process of nominations and member voting. The club has three trustees:- <ul style="list-style-type: none"> • President • Secretary • Treasurer

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.

In the period 1 July 2022 to 30 June 2023 we had 12no Club members registered with Doncaster Went Valley Lions. All are unpaid volunteers who give up their time to run and support the Club and to provide urgently needed assistance to the local community and to other local, regional national and international charitable causes.

We hold meetings once monthly at which we review the merits of any service requests received and determine the course of action we decide to adopt.

At club meetings we also review the financial status of the club for our charity and administration accounts and we plan and programme ahead for fund raising events and support initiatives.

We have a close working relationship with various support organisations and agencies who offer assistance to the club and submit applications for service support initiatives:-

- Doncaster Council Social Services
- Doncaster Council Communities Team
- Health Professionals
- Care Workers
- Community Support Workers
- Schools

The operation of the Doncaster Went Valley Lions branch of the Charity is dependant on the unpaid volunteer members devoting sufficient time and resources to the running of the club and in attaining a quorum level of member attending the meetings. This is reflected for example by factors of age, health, well-being and availability of club members.

In the period 1 July 2022 to 30 June 2023 we have managed to provide active support for around 41 service applications and activities throughout the year...this is a level of service activity that we are very proud of and an accolade to our volunteer club members who have worked assiduously in these times of hardship and need.

Section C Objectives and Activities

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

The Objectives of the Club are for such purposes as are exclusively charitable in England & Wales, including in particular:

The advancement of citizenship by:

- Promoting the principles of good citizenship;
- Encouraging members to take an active interest in the civic, cultural, social and moral welfare of the community;
- Providing a forum for the open discussion of all matters of public interest; provided that partisan politics and sectarian religion shall not be debated by members;
- Encouraging service-minded people to serve their community without personal reward and encouraging the promotion of high ethical standards in commerce, industry, professions, public works and private endeavours;
- Supporting youth to develop their skills, capacities and capabilities to enable them to participate in society as mature and responsible individuals;
- Promoting the Voluntary Sector for the public benefit by associating with local authorities in a common effort to advance education and provide facilities in the interests of social welfare for recreation or other leisure time occupation to improve the conditions of life of people in local, national and international communities;
- Promoting volunteering;
- The relief of poverty and the relief of those in need in particular by providing humanitarian aid and disaster relief;
- The advancement of health or the saving of lives by preventing avoidable blindness, assisting disabled people to lead independent lives or helping to prevent or manage health issues;
- Promoting for the benefit of the public the conservation protection and improvement of the physical and natural environment; and/or Promoting community participation in healthy recreation.

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)

Activites of the Club

In the period July 2022 to June 2023 our main service activities related to the provision of goods, services, donations and sponsorships via applications for help received from directly members of the public or via their professional support agencies or representatives.

The following are examples of the assistance we have provided throughout the year:-

Service Requests:-

- Clothing – Womens Refuge (underwear items)
- Clothing – Assorted to Food & Clothing Banks
- Foodbank Supplies (x6)
- Curtains & Poles (x2)
- Carpets (x3)
- Underwear - Uniform Bank
- Lawn Mower – Memorial Hall
- Christmas Fundraiser Prizes – Scout Group
- Flooring Coverings
- Christmas Hampers – Scout Group
- Advent Calendars

- Double Bed & Mattress
- Single Bed & Mattress (x3)
- Embroidery Sewing Machine – Community Centre
- Bedroom Drawers
- Microwave
- Sofa Cleaning
- Bedroom Wardrobes (x3)
- Electric Cooker
- Storage Boxes (x10) – Church Uniform Bank

Community Support Activities:-

Gardening refurbishment work – Community Centre
Storage facilities and prep/painting – Foodbank
Recycled spectacles

Donations/Grants/Sponsorships:-

- Lions Fun & Sports Day for the Disabled
- Zone Project – Serenity Appeal
- Lions Summer Walk – Local Community Support
- Voucher for afternoon tea – Community Hall
- Grant for outings and social activities – Upbeat
- Christmas Toy Appeal

Fundraising:-

- Christmas Santa's Sleigh for 3 weeks in December (Charity A/C)
- Easter Egg Raffle - April (Charity & Admin A/C)
- Cancelled - Lions Charter Dinner Raffle (Charity A/C)
- Lions 100 Club (Administration A/C)
- Lions Member Subscriptions (Admin A/C)
- Donations and collections (Charity & Admin A/C)
- Lions/External Grants (provisional)

Doncaster Went Valley Lions Club (CIO)

Public Benefit Statement

Club members share the 'Services' role reflective of their availability, knowledge, skills, experience and location. Club members duly consider each of the possible causes or applications for funding, and they carry out a process of due diligence on each of the possible beneficiaries, including assessing the significance and benefits of the service request to the individual and/or the community.

Grants, donations and support initiatives are made for the benefit of people in the Doncaster area however, this does not preclude grants, donations and support being made to Lions Club Multiple District sponsored appeals and Internationally through the Lions Clubs International Foundation (eg, relief of poverty, responding to disaster relief or help people with disabilities), thereby extending the public benefit overseas. After due diligence and reporting, the Club Members will vote on each grant, donation and support initiative, the results of which are duly minuted in Club records.

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.

DONCASTER WENT VALLEY LIONS CLUB (CIO)

Grant Making Policy

1. The Objects of the Doncaster Went Valley Lions Club

Under the terms of the Clubs' Constitution, Trustees apply funds at their discretion, making grants where they believe that their contribution will make a real difference. We can only make grants in furtherance of our charitable objectives.

2. Priorities for Support

The number of applications that can be supported is, of necessity, limited to the amount of funds available for distribution in any one year. The Trustees have determined that the priorities for funding will be subject to other elements of the Trustees grant-making policy, no restrictions are imposed on the purpose for which a grant may be made; thus, applications for support towards capital projects, other projects or core costs are considered; as there are numerous Lions Clubs in the UK, applications from the local Doncaster Went Valley areas are generally given a priority. Trustees also consider international funding requests referred to them by the Lions International organisation; candidates for support and/or grants are all considered on their own merits, following investigation by the club membership. However, given that most of the available funds are raised within the local community, those candidates that are local are given special consideration. Using the former as a guiding principle the following are examples of areas adopted for support:

Local Charities - youth groups, groups working with the elderly, residential and nursing homes, disabled and individual appeals;

Youth and Children's Organisations - sport related groups or individuals, scouting and guiding, youth club activities, young people undertaking overseas assignments;

Community Facilities — aid for disadvantaged, elderly, homeless individuals and families, village hall projects. Community aid and support is generally provided through service requests generated from NHS Health Professionals and Health Visitors, Care Support Workers, Council Social Services and Local Health Centres as well as direct from the General Public.

The above priorities in this policy will be reviewed every year when a budget is compiled (or more often if deemed appropriate by the Trustees), and may be changed in accordance with the Trustees' view of the most effective application of available funds at any point in time.

3. Principles

In awarding grants, the Trustees will apply the following principles:

- Trustees will not normally support applications from large national charities or charities dedicated to issues deemed by the Trustees to be already well funded;
- Trustees will work with other organisations to fund initiatives beyond the financial scope of a single organisation;
- All applications from previous recipients of grants or from previously unsuccessful applicants will be considered by Trustees

on their own merits. Although Trustees will have regard to the outcome of the previous grant, any new application will not receive preferential or adverse consideration.

4. Exclusions

- 4a The Trustees will only approve the use of funds for medical research projects of international, national or locally based charities if a distinct local benefit can be established;
- 4b The Trustees will not normally approve the use of funds for purposes for which government has a statutory responsibility to provide.
- 4c The Trustees will not normally make cash or cheque payments to individuals. The Club will instead purchase goods and services for delivery to their customers or make grant, donation and sponsorship payments by cheque to the official bank account of an organisation. Alternatively a Club Member might arrange to accompany a customer for the purchase of goods, eg, clothing, toys, etc, and pay direct to the supplier, or the Club may entrust a known Care Professional with a designated level of funding who would accompany a customer to purchase the goods and to make payment and provide a receipt for the purchase(s).

5. Grant Application Process

All applications for grants should be made to Lion Secretary, Doncaster Went Valley Lions Club, by post to 2 Redhouse Lane, Doncaster DN6 7UX or by email to info@wentvalleylions.co.uk or by contacting the Club on the Lions District 105 Generic Number 0345 833 9558.

We now encourage Service Requests to be submitted to us online via our new 'Airtable' system which includes a statement of the Club's position regarding GDPR that the requester should agree to in order for us to further consider the request.

Before awarding a grant to an organisation or an individual, the Trustees require that the applicant should:

- Inform the Trustees of the purpose of the application, details of the project, the way in which the grant will be used and how it will be managed effectively for its intended purpose;
- Provide adequate information regarding the identity and financial status of the recipient and/or of the status of the person(s) who will carry out the project/work;
- All equipment purchased with the grant is owned and remains the property of the grant recipient (whether an organisation or an individual);
- Confirm that any item purchased using a grant will be installed at the place intended for its use;
- On receipt of the grant a written acknowledgement of the receipt is to be issued to the Lion Secretary and the transaction is recorded in the Club minutes;
- To comply with the Data Protection Act 2018 and the General Data Protection Regulations, applicants and their nominated representative(s) are required to consent to the use of personal data supplied by them in the processing and review of their

application. This includes transfer to and use by such individuals and organisations as the Trustees deem appropriate. The Trustees require the assurance of the applicant that personal data about any other individual is supplied to the Trustees with his/her consent. At the point of submitting an application, applicants and their nominated representative(s) are asked to confirm this consent and assurance.

6. Assessment Process

The assessment process will be that:

- All grant applications will be subject to initial assessment to ensure that they meet the basic criteria for funding. Grants will be considered by the Trustees at their meetings and they will aim to inform the applicant of the outcome of their application for funding;
- Trustees will not be obliged to provide an explanation to the applicant should their application be unsuccessful, however Trustees do realise the importance of feedback and will where appropriate provide suitable comment to the applicant;
- Applicants should note that Trustees may receive far more applications than they have funds to support. Even if a project fits with the criteria and priorities of the Trustees and a detailed assessment has been made, Trustees may still be unable to provide the grant.

7. Monitoring and Publicity

It is the policy of the Trustees to monitor at their discretion, all grants made. Where the grant is for an extended period, project progress should be reported on a regular basis. In addition to reports detailing progress, grant recipients are expected to provide:

- A statement of how the grant monies have been spent, this may be in writing or to take up the opportunity (where appropriate) to visit Trustees to deliver a personal report of how the grant has been spent; details (where appropriate) of other funds applied to the same project;
- Trustees or their representative(s) may, where appropriate, visit the applicant to view the progress/success of the project and see how and where the grant has been spent.

If applicable and of a non-sensitive nature, Trustees may ask applicants to consent to the use of their information and project details for publicity purposes, including on-line, in print and otherwise.

Summary of the main achievements of the charity during the year

DONCASTER WENT VALLEY LIONS CLUB (CIO)

Governance

Doncaster Went Valley Lions Club is in Lions District 105N and is part of Lions Clubs International Multiple District 105 which covers the UK & Ireland. As a Lions Clubs their purpose is to "serve local communities" and Lions principles to which the clubs must adhere include "acting to benefit the public interest". Administrative costs at local, national and international level are in part covered by annual membership fees and they are further supported by Admin fundraising initiatives and donations. This means that all other monies raised by Charity fundraising initiatives and donations are spent supporting good causes (eg, registered charities, charitable grants to individuals and organisations).

The Trustees of Doncaster Went Valley Lions Club (CIO) understand that the club is subject to charity law and will only be able to undertake activities which are charitable.

Purposes

The club operate within the agreed objects of the Charity Commission, however the trustees may change the focus from time to time. The trustees are independent and make their own decisions, but as a Lions charity they will consider national appeals and members' guidance as part of their decision making.

Examples of activities undertaken by this club include:

- **Advancement of Citizenship:** Encouraging people to volunteer e.g. working in conjunction with volunteers from the local community. Each year the club promote their Santa Seligh collection around the streets of Northern Doncaster. This is a major fundraising event but is also a much anticipated local event for the community.
- **Promoting the Voluntary Sector for the public benefit by associating with local authorities in a common effort to advance education and provide facilities in the interests of social welfare, etc:**
The club have a good relationship with both the local Council especially the Social Services and with NHS Health and Care Professionals. Each year they received referrals from the Council and Care Professionals about support needed for local families facing hardship. Each year they make donations and provide support for the provision of items such as carpets, white goods, eg, cookers, washing machines, fridges and freezers, also household furniture, beds and mattresses, safety gates, educational and clinical aids etc, to support these families. We have also experienced a major call to support the various community food banks and clothing banks in our Lions area which we expect to be an ongoing need for the foreseeable future.
- **Promoting Volunteering:**
Recruiting new Lion members to support regular local activities. By working locally and supporting / promoting local events the club are helping to promote volunteering. A number of the donations this year have been aimed at supporting community organisations. The club continues to recruit further members who are willing to support the club in their activities.

- **Relief of poverty and relief of those in need – the club support causes both locally and internationally**
As well as the clubs community support through the local Councils and health care referrals, they have donated funds to Water Aid and Lions Sight Savers and to various Lions Clubs International Projects supporting developing countries and disaster relief initiatives.
- **Advancement of Health:**
The club have made donations towards the Lions Summer Walk in support of Doncaster Cancer and Parkinsons Charities, we continue to support the Lions 'Message in a Bottle' scheme and we support the 'Lions Annual Fun and Sports Day for the Disabled' organised on behalf of Lions District N. In addition donations are provided for funding towards medical and clinical support needs.
- **Environment:**
The Club are keen to support environmental projects in their local area and have in the past been invited to support litter picking initiatives organised by the local council. They also support recycling initiatives, eg, spectacle and hearing aid collections, reconditioned white goods, the provision of quality second hand furniture, etc, and are mindful of their carbon footprint reflective of their travel arrangements. In addition Club members fully support waste recycling schemes and they endeavour to conduct their services so as to minimise their negative impact on the environment. Whenever white goods, such as washing machines, fridges, freezers, etc, are purchased the Club also endeavour to source out energy efficient appliances with A* ratings whenever possible and affordable or supply fully serviced reconditioned appliances in support of recycling initiatives.
- **Healthy Recreation** The club have supported junior football and cricket clubs in the local area.

Grant Making Policy

Trustees have adopted the grant making policy formally for the CIO. As the CIO has general charitable purposes, any charitable objects fall within that policy. The club however retains its discretion to change its policy and/or make grants and donations to other charitable projects.

Operating and Public Benefit

The national Lions body, 'Lions Clubs International Multiple District 105', provides various template policies which it is then up to individual clubs to adopt. The CIO will undertake its own reporting and administration, as well as making its own independent decisions on choice of grantees. The Multiple-Districts have sight of the Club accounts but will have no direct input into the running of the CIO.

Personal Benefit

Doncaster Went Valley Lions Club occasionally gives grants and donations to individuals, for example financial support of individuals on gap years or to attend sporting events so those individuals can achieve their full potential, whether that potential be in education leading to future employment or towards a sporting achievement.

The Trustees take steps to ensure that grants and donations made to individuals are to be put to good use, specifically charitable purposes to do with health, well-being, welfare or education. In cases of hardship, the preferred option is to donate to a fund-raising effort, or to pay a contractor

Section D

Achievements and Performance

or service supplier directly for necessary work to be done or goods to be supplied.
Doncaster Went Valley Lions Club members do not benefit from grants or donations made by the Club.

Accounting for Volunteer Events

Any events run by Doncaster Went Valley Lions Club are not as a "reward" for individuals, but are undertaken to motivate the membership, build up the team of volunteers by mobilising additional support from the community, promote volunteering and, in some cases, as fundraisers. These events also aim to encourage attendees to take an active interest in the community and may provide a forum for discussion of matters of local public interest. In any event the members pay the costs of these events themselves through administration funding.

Section E

Financial Review

Brief statement of the charity's policy on reserves

As a matter of policy Doncaster Went Valley Lions Club (CIO) do not hold any prescribed level of reserve funding.
The Club may however typically carry over funding in the order of £3,000-£4,000 from one Lionistic year to the next which permits the continuity of support services to be provided pending the delivery of fund raising activities later in the year.
A specified level reserve funding is not held in any of our accounts as we have no ongoing liabilities that must be covered. We will not commit the club to any expenditure that cannot be met from the balance of our existing funds. Once the funding is depleted we shall cease to provide support services until further funding becomes available.

Details of any funds materially in deficit

The club have no funds or subsidiary undertakings that are materially in deficit.

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.

Charity Funding:-

Christmas Sleigh Collections
Easter Egg Raffle
Charter Dinner Raffle
Lions/External Grants (provisional)
Donations (various)

Administration Funding:-

Annual Members Subscriptions
Lions 100 Club
Raffles
Donations & Collections (various)

The club do not have any pension liabilities as we do not engage paid employees.

The club do not hold any material financial investments.

The majority of the club's annual charity income is raised from the annual Christmas Sleigh Collection and from the Easter Egg Raffle.

The annual Santa Sleigh collection programme runs for the first three weeks of December. As well as being a major fundraiser for the Club it is also actively supported by the local communities who look forward to greeting Santa and making this a unique early Christmas experience for children and adults alike. This is a key activity for the Club in support of their engagement with the local communities in the Doncaster Went Valley area to the north of Doncaster.

The club have good liaison with the local Council Social Services, Health Professionals and Care Support and Community Support Workers. From referrals the club will make decisions as to the best way to support local families who maybe vulnerable or facing hardship.

Section F

Other optional information

The operation of the Doncaster Went Valley Lions branch of the charity is dependant on the unpaid volunteer members devoting sufficient time and resources to the running of the club and in attaining a quorum level of member attending the meetings. This is reflected for example by factors of age, health, well-being and the availability of club members.


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)

Barry Roughley

Position (eg Secretary, Chair, etc)

President

(current President at time of TAR submission)

Date

September 2023

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Michael Burke

Position (eg Secretary, Chair, etc)

Secretary

(current Secretary at time of TAR submission)

Date

September 2023

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

Signed on behalf of the charity's trustees

Signature(s)

Full name(s)

Karen Taylor

Position (eg Secretary, Chair, etc)

Treasurer

(current Treasurer at time of TAR submission)

Date

September 2023

DONCASTER WENT VALLEY LIONS CLUB (CIO)

INCOME AND EXPENDITURE BALANCE SHEET

FOR THE YEAR ENDING 30th JUNE 2023

CHARITY ACCOUNT (12335582)

Charity Account Balance Sheet (2022-23)		
Transaction	Income	Expenditure
Carry over balance from 30 th June 2022	12017.08	
Service Requests (various) (x21)		3484.85
Doncaster Food Banks (x8)		1196.31
Donations to Charity A/C	372.53	
Zone Project (Serenity)		20.00
Thorne Lions Summer Walk Donation		150.00
Christmas Sleigh (Dec 2022)	7500.94	1064.03
Sleigh (major refurbishment)		2885.59
Storage Container (6.0mx2.4m)		1800.00
LCI Donation		66.00
LCI Turkey Appeal		500.00
Easter Egg Raffle (April 2023)	350.00	138.88
Lions Disabled Fun & Sports Day		150.00
Total =	20240.55	11455.66

**Charity Account Balance =
£8,784.89**

(as at 30th June 2023)

DONCASTER WENT VALLEY LIONS CLUB (CIO)

INCOME AND EXPENDITURE BALANCE SHEET

FOR THE YEAR ENDING 30th JUNE 2023

ADMINISTRATION ACCOUNT (12335574)

Admin Account Balance Sheet (2022-23)		
Transaction	Income	Expenditure
Carry over balance from 30 th June 2022	624.21	
Member Subscriptions Received (2022-23)	450.00	
Advanced Member Subscriptions Received (2023-24)	85.00	
July 2022 Fees & Insurance (1)		406.56
Jan 2023 Fees & Insurance (2)		636.41
Christmas Sleigh (Dec 2022) - Donations to Admin A/C	450.00	
DWVL Charter	1171.00	
Lions Fun & Sports Day (#WR)		20.27
Website		90.00
Gambling License		40.00
Donation to Admin A/C	35.00	
Printer Ink		11.99
Barnsley Lions Club (#MB)		44.00
Mex Lions Club (#MB)		50.00
Member Leaving Gifts		48.00
Flowers (#PW)		25.00
Miscellaneous		103.90
Postage (LCI Specs)		6.36
Easter Egg Raffle (April 2023)-Donations to Admin A/C	411.00	
Total =	3226.21	1482.49

Admin Account Balance = £1,743 72

(as at 30th June 2023)