



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 1/9/2022 Period start date To 31/8/2023 Period end date

Charity name: Wivey Cares

Charity registration number: 1183575

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To actively promote the physical, emotional, mental & social wellbeing of the inhabitants of Wiveliscombe.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>1) Through the Wivey Cares Co-ordinator, we facilitate introductions of those requiring Care with self-employed Micro- Providers. We support the Micro-Providers, with appropriate training and introductions.</p> <p>2) The Co-ordinator manages the network of Volunteers who provide befriending activities.</p> <p>3) The Co-ordinator provides guidance and support in claiming Attendance Allowance.</p> <p>4) The Co-ordinator supports the local Memory Activity Group.</p> <p>5) The Wivey Food Project takes surplus food from FareShare and local retailers, and with a team of volunteer cooks and drivers provides over 400 meals that are delivered free of charge (although donations are accepted) to vulnerable households in the community.</p> <p>6) Wivey Grows is a community-based growing project that aims to provide the opportunity, space and support for people of all ages and abilities to grow food and flowers, eat, learn, create and play in a nurtured and shared haven.</p> <p>As Trustees, we have had regard to the Charity Commission's guidance on public</p>

		benefit and maintain a close regard to our charitable objectives.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have regard to the Charity Commission's guidance on public benefit

**Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Volunteers make an important contribution to the running of the Memory Activity Group (4 volunteers) and Wivey Food Project (15 volunteers)
Other		

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## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>In the year, Wivey Cares has grown its network of volunteers and register of Micro-Providers (Self- Employed Carers) which stood at 56 at the end of the year, who respond to diverse requests for help and assistance from the community that is Wiveliscombe and the surrounding parishes.</p> <p>We have been able to help secure the Higher Rate Attendance Allowance for over 140 residents, making a major difference to their ability to secure the care they needed, and are entitled too.</p> <p>These funds have facilitated the growth in number of Micro-Providers operating in Wiveliscombe, up from four when we launched, to fifty-six now. The number of people receiving care has risen to over 80 and this number is growing monthly.</p> <p>With the increased availability of Micro-Providers, we are now able to facilitate earlier Hospital discharges, (with cost savings to the NHS from 'bed blocking') We envisage this to be an area of growth and funding for our co-ordinators in the coming years.</p> <p>The Memory Activity Group has gone from strength to strength with around 20 people attending on a weekly basis. The positive feedback is testament to the hard work put in by Reminiscence Learning, our coordinator and volunteers.</p> <p>By utilising and building on our network of volunteers, we have been able to continue the running of the Wivey Food Project, which during the year has cooked and delivered over 22,000 meals. In addition to the benefits to the recipients, the positive impact on the wellbeing amongst the volunteers as camaraderie built up, is building on a solid volunteer base in our community. This has now become an invaluable service to vulnerable households. We have become an exemplar of delivering community food resilience, and we are looking to build on this in the coming year. The Wivey Food Project became a separate charity in February 2023 under the name of Wivey Kitchen CIO.</p> <p>Wivey Grows continues to flourish. It is a</p>

		community-based growing project that aims to provide the opportunity, space and support for people of all ages and abilities to grow food and flowers, eat, learn and create in a shared environment. The licence with Voyage Cares is continuing and is based at Langley House near Wiveliscombe, which provides us with a full range of facilities.
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### **Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	The network of Micro-Providers has grown in line with objectives which has been managed by increased working hours of our co-ordinator. Those attending the Memory Activity Group has shown a very pleasing increase with the local care home being actively involved. The Wivey Food Project has continued to increase the number of volunteers who meet weekly to prepare over 400 meals.
Performance of fundraising activities against objectives set	Para 1.41	Fundraising has been successful meaning we have funds which gives us a reserve of about 6 months.
Investment performance against objectives	Para 1.41	
Other		



## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	
Amount of reserves held	Para 1.22	
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<p>The principal source of funds comes from grant applications, notably</p> <p>The Allan Lane Foundation</p> <p>Somerset Community Foundation</p> <p>Fairfield Charitable Trust</p> <p>Wiveliscombe Town Council</p> <p>Plus fundraising events held locally</p>
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	<p>We are looking in the future to becoming less reliant on grants and becoming more self-sustaining. We hope to use development funds to set up a 'Friends of Wivey Cares' scheme to provide a monthly revenue.</p>

Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Elected by resolution of Trustees

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	New trustees are given an induction from the Chair, Treasurer and Co-ordinator to look at the constitution to become confident in the running of the charity. Existing trustees pass on information about their area of responsibility at the monthly meetings and everyone is involved with evaluating the success of Wivey Cares.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The charity works with the doctors surgery, village agents, local schools and hospital to identify anyone in need of extra care.
Relationship with any related parties	Para 1.51	



Other		

## Reference and Administrative details

Charity name	Wivey Cares
Other name the charity uses	
Registered charity number	1183575
Charity's principal address	Community Office 3 The Square Wiveliscombe Somerset TA4 2PX

### 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	David Patterson	Chair		
	2	Christopher Alan Howe	Trustee/Treasurer		
	3	Rosie Boylan	Trustee		
	4	David Lawrence Topham	Trustee		
	5	Beverley Anne Shaw	Trustee	From 1/12/2022	
	6	John Ernest Osborne	Treasure	Up to 15/2/2023	
	7	Nina Katherine Benson	Trustee	Up to 15/2/2023	
	8	Mark Blaker	Trustee	From 27/4/2023	
	9				
	10				
	11				
	12				
	13				
	14				
	15				
	16				
	17				
	18				
	19				
	20				

### Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

[illegible]

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

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

## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

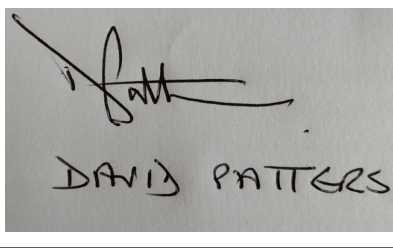
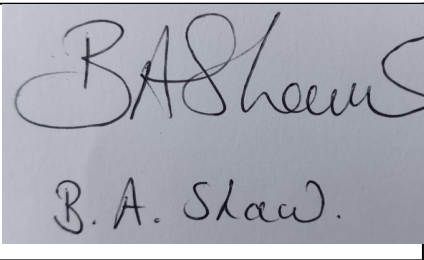
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Declarations

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

Signed on behalf of the charity's trustees

	Signature(s)		
	Full name(s)	David Patterson	Beverly Shaw
	Position (eg Secretary, Chair, etc)	Chair	Deputy Treasurer
	Date	17/06/2024	



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

Charity Name  
Wivey Cares

No (if any)  
1182575

## Receipts and payments accounts

**CC16a**

For the period from	Period start date	To	Period end date
	9/1/2022		8/31/2023

### 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 £
<b>A1 Receipts</b>					
Donations, legacies and grants	27,410	16,992	-	44,402	61,979
Interest	63	-	-	63	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>27,473</b>	<b>16,992</b>	<b>-</b>	<b>44,465</b>	<b>61,979</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>27,473</b>	<b>16,992</b>	<b>-</b>	<b>44,465</b>	<b>61,979</b>

### A3 Payments

Memory Activity Group	6,398	-	-	6,398	-
Insurance	230	461	-	691	-
Wivey Kitchen equipment	-	6,233	-	6,233	-
Wivey Food Project ingredients	-	4,819	-	4,819	-
Wivey Grows supplies	-	5,541	-	5,541	-

Minutes secretary	300	-	-	300	-
Admin	887	312	-	1,199	-
Wages	18,217	-	-	18,217	-
Transfer to Wivey Kitchen	-	10,469	-	10,469	-
<b>Sub total</b>	<b>26,032</b>	<b>27,835</b>	<b>-</b>	<b>53,867</b>	<b>33,265</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	
	-	-	-	-	
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>14,146</b>
<b>Total payments</b>	<b>26,032</b>	<b>27,835</b>	<b>-</b>	<b>53,867</b>	<b>47,411</b>
<b>Net of receipts/(payments)</b>	<b>1,441</b>	<b>- 10,843</b>	<b>-</b>	<b>- 9,402</b>	<b>14,568</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>12,621</b>	<b>16,997</b>	<b>-</b>	<b>29,618</b>	
<b>Cash funds this year end</b>	<b>14,062</b>	<b>6,154</b>	<b>-</b>	<b>20,216</b>	<b>14,568</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 £
<b>B1 Cash funds</b>	Triodos 16-58-10 21127530	163	6,154	-
	Co-op 08-92-99 67286184	13,899	-	-
		-	-	-
	<b>Total cash funds</b>	<b>14,062</b>	<b>6,154</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
		<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>Endowment funds</b>



**B2 Other monetary assets**

Details	to nearest £	to nearest £	to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

**B3 Investment assets**

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-

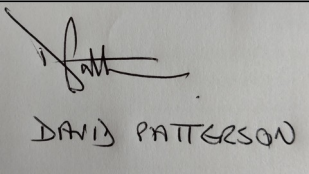
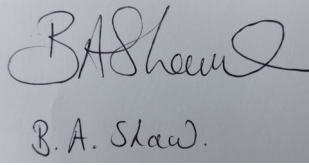
**B4 Assets retained for the charity's own use**

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
 DAVID PATTERSON	David Patterson	17/06/2024
 B.A. Shaw.	Beverly Shaw	17/06/2024



Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name  
Wivey Cares

On accounts for the year  
ended

31/08/2023

Charity no  
(if any)

1183575

Set out on pages

1

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/08/2023**.

Responsibilities and  
basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed: J. Sharland

Date: 10/06/2024

Name: Jake Sharland CGMA

Relevant professional  
qualification(s) or body  
(if any):

The Chartered Institute of Management Accountants

Address:

Saddlebacks, Holcombe Rogus, Wellington, TA21 0PN