

THE ROSE AND DAISY FOUNDATION

England & Wales · Charity number 1184999

Details

Other names	THE ROSE PETERS FOUNDATION
Status	Registered
Legal form	CIO
Registered	2019-08-21
Register	View on the Charity Commission register

Contact

Address	2 Astley Road Bromsgrove B60 2RS
Phone	07398138243
Email	info@roseanddaisyfoundation.org
Website	roseanddaisyfoundation.org

Activities

Objects: THE OBJECTS OF THE CIO ARE:TO RELIEVE THE EMOTIONAL AND PHYSICAL DISTRESS OF PARENTS AND THEIR FAMILIES THAT HAVE EXPERIENCED THE DEATH OF A BABY THROUGH NEONATAL LOSS, INFANT LOSS, STILLBIRTH AND MISCARRIAGE OR HAVE A BABY IN INTENSIVE CARE THROUGHOUT WORCESTERSHIRE AND THE WEST MIDLANDS BY:A) SUPPORTING PARENTS WHILST CURRENTLY IN HOSPITAL WITH THEIR CHILDREN AND PROVIDING HELP WHEN REQUIRED.B) SUPPORTING AND PROMOTING INFORMATION TO PARENTS WHO HAVE EXPERIENCED THE LOSS OF A CHILD.C) TO PROMOTE CROSS TRUST COMMUNICATION TO PREVENT PARENTS WHO HAVE EXPERIENCED A LOSS OR WHO ARE IN HOSPITAL RECEIVING LETTERS, PHONE CALLS ETC. ABOUT SUBJECTS SUCH AS POST-NATAL CHECKS.D) TO MAKE DONATIONS TO OTHER CHARITABLE CAUSES THAT HAVE SIMILAR OBJECTIVES TO OURS, IF DEEMED ACCEPTABLE BY OUR TRUSTEES.E) WORKING WITH TRUSTS TO ENSURE CARE GIVEN TO BEREAVED PARENTS IS UNIVERSAL AND TO THE SAME STANDARD ACROSS TRUSTS.

Activities: To relieve the emotional and physical distress of parents and their families that have experienced the death of a baby through neonatal loss, infant loss, stillbirth or miscarriage or have a baby in intensive care.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** General Charitable Purposes
- **Who:** The General Public/mankind

Geography

- Birmingham City
- Dudley
- Gloucestershire
- Herefordshire
- Sandwell
- Solihull
- Walsall
- Wolverhampton
- Worcestershire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£6,412	£18,889	-	-
2024-03-31	£6,592	£3,301	-	-
2023-03-31	£23,245	£16,700	-	-
2022-03-31	£20,761	£13,219	-	-
2021-03-31	£10,714	£8,201	-	-

Trustees

Name	Role	Appointed
Jamie Peters	Chair	2019-04-19
Hannah Peters		2019-04-19
Thomas Nevett		2019-04-19

THE ROSE AND DAISY FOUNDATION

England & Wales - Charity number 1184999

Accounts



(A Charitable Incorporated Organisation)

**TRUSTEES ANNUAL REPORT AND FINANCIAL
STATEMENT FOR PERIOD 1ST April 2024 to 31ST MARCH 2025**

Registered charity number: 1184999

The Rose and Daisy Foundation

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees

Mr Jamie Peters (Chair)
Mrs Hannah Peters
Mr Thomas Nevett

Principal Office

2 Astley Road
The Oakalls
Bromsgrove
B60 2RS

Charity Number

1184999

Website

roseanddaisyfoundation.org

TRUSTEES REPORT

For period ending 31st March 2024

The trustees present their report and accounts for the year ended 31 March 2024.

Structure, Governance and Management

The charity is governed by its Constitution as a Charitable Incorporated Organisation dated 20th April 2019 and managed by a Board of Trustees.

Trustees meet in person or digitally where required to consider the charities performance; fund raising initiatives; governance reviews; establishment of appropriate policies and all new fundraising drives/campaigns.

New trustees are appointed for a term of three years and are inducted through meetings with the Trustees to explain the charity's strategy, policies and procedures.

All trustees are provided with a copy of the constitution, latest Trustees' Annual Report and Financial Statements.

All trustees give their time freely and none receive any form of remuneration.

Objectives and Activities

The objects of the CIO as stated in the constitution are:

To relieve the emotional and physical distress of parents and their families that have experienced the death of a baby through neonatal loss, infant loss, stillbirth or miscarriage or have a baby in intensive care throughout Worcestershire and the West Midlands by:

- a) Supporting parents whilst currently in hospital with their children and providing helping when required.
- b) Supporting and promoting information to parents who have experienced the loss of a child.
- c) To promote cross trust communication to prevent parents who have experienced a loss or who are in hospital receiving letters, phone calls etc. about subject such as post-natal checks.
- d) To make donations to other charitable causes that have similar objectives to ours, if deemed acceptable by our trustees.
- e) To make grants to any medical research that is deemed acceptable by our trustees.

The Rose and Daisy Foundation

- f) Working with trusts to ensure care given to bereaved parents is universal and to the same standard across trusts.

Public Benefit

The trustees have taken due regard of the Charity Commissioners guidance on public benefit when reviewing its aims and objectives and planning future activities.

The trustees are satisfied that the charity and its aims meet the Charity Commission's guidelines for public benefit.

The Rose and Daisy Foundation

Achievements and Performance

The trustees are happy to report that the support groups which began in 2021 had continues into the 2024/205 year but they are also saddened to report that the numbers continued to dip during this year and decision was taken to stop the support groups in early 2025 due to numerous factors including low to no participants and the inability have a facilitator at the group increasingly.

The charity has continued to supply it's parent well-being boxes to hospitals and this year has seen over 100 boxes and 60 parent well-being journals (individually sent as requested from a hospital) distributed.

Hannah and Jamie, who carry out the day to day running of the charity and its activities, returned to operational duties in 2024. During this time the charity continues to explore manufacturers for the memory bears and we are happy to report a suitable supplier was found, bears designed and initial order was placed for the bears. The bears were still in the manufacture phase at the end of this year.

This year the charity started to offer counselling to bereaved parents through the use of a registered partner councillor. The charity provides 8 free sessions to parents and then also has the option to provide a further 8 sessions at 50% of the cost. To date we have assisted 4 parents with this service and the feedback has been very positive.

The charity took part in a family music festival during this year with the aim to provide awareness and fundraise for the charity. The charity provided DJ's for the event who kindly donated their services free of charge and we held a stall selling our merchandise, offering information on the charity and hosted a penalty shootout with an inflatable goal. Unfortunately the festival turnout was extremely low due to the weather conditions and other events happening in the area meaning the success of the activities were greatly reduced. It is noted however, that the interactions volunteers had with festival goers was extremely positive and we believe the main outcome from the activity was awareness for the charity.

Next year the charity wishes to try and build upon it's activities and continue to provide the counselling service to bereaved parents and also eagerly awaits the arrival of our new memory bears.

The Rose and Daisy Foundation

Financial Review

The trustees feel the fundraising the charity has undertaken during this year has been as expected.

The charity this year has seen a slight upturn in in donations from the general public. This was to unexpected due to the reduced activity although it is noted there was a flurry of activity before the unexpected reduction. Total raised funds from donations has totalled £5,379.

The charity only ran a single fundraising event early August 2024 due to reduced activity. This has bought in £1,033.

The trustees note that the costs of activities has increased this year due to the purchase of memory bears and the start of the counselling service.

Unrestricted Funds and Reserves Policies

Unrestricted Funds are spent or applied at the discretion of the trustees to fund any of the charity's aims and activities.

The trustees may choose to designate a part of the Unrestricted Funds to be used for a particular future project or commitment. Such a Designated Fund remains part of the Unrestricted Funds of the charity.

The trustees will regularly review the charity's need for adequate reserves in the light of the changing risks of the organisation.

The unrestricted funds of the charity this year stood at £12,832 at the end of the period (31st March 2024)

The Rose and Daisy Foundation

Restricted Funds

The trustees will continue to monitor the usage of the funds and have agreed that where funds will not be used in full during the accounting year, it is possible to defer income into the next accounting period for use.

The restricted funds of the charity stood at £0 at the end of the period (31st March 2025)

Independent Examination of Financial Statements

Gross Income during the reporting period was less than an annual rate of £25,000 and therefore, the trustees have elected to take advantage of sections 144 & 145 of the Charities Act 2011 in not submitting these Financial Statements to audit or independent examination. No such examination is required by the charity's Constitution.

The Rose and Daisy Foundation

The Trustees' Report was adopted by the Board of Trustees on 18th January 2026.

A handwritten signature in black ink, appearing to read 'J.C.P.', is written over a solid horizontal line. Below this line is a dashed horizontal line.

Jamie C Peters
Chair of Trustees

STATEMENT OF TRUSTEE'S RESPONSIBILITIES

For period ending 31st March 2025

The trustees are responsible for the preparation of the trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards.

The trustees are required to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity as at the balance sheet date and of its income and expenditure for the period ended on that date. In preparing financial statements the trustees are required to –

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and,
- Prepare the financial statements on the going concern basis unless it is inappropriate to assume that the charity will continue in operation.

The trustees are responsible for maintaining such proper accounting records as are necessary to disclose with reasonable accuracy and at any time the financial position of the charity. The trustees are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees confirm that they have complied with these requirements.

Signed on their behalf on 18th January 2026.



Jamie C Peters
Chair of Trustees

STATEMENT OF FINANCIAL ACTIVITIES
For period ending 31st March 2025

	2024	2023
	£	£
Receipts		
Donations, legacies and grants	5,379	4,445
Fundraising events	1,033	300
Restricted Fund Grants	0	1,846
Total Receipts	6,412	6,592
Payments		
Cost of fundraising events	5,044	623
Governance costs	2,282	705
Cost of charitable activities	10,803	127
Purchase Equipment & Supplies	759	0
Restricted Fund Activity	0	1846
Total Payments	18,889	3,301
Surplus for the year carried to unrestricted funds	3,290	3,290
Funds brought forward on 1st April	25,308	22,017
Funds carried forward as of 31st March	12,832	25,308

The statement of financial activities includes all gains and losses during the period.

The Rose and Daisy Foundation

BALANCE SHEET
as of 31st March 2025

	2024	2023
	£	£
Fixed Assets		
Computers and technical equipment	0	0
Furniture, fixtures and fittings	0	0
Other equipment and assets	0	0
Current Assets		
Cash in hand and at bank	12,832	25,308
Net Assets	12,832	25,308
Funds and Reserves		
Unreserved fund	12,832	25,308
Total funds and reserves	12,832	25,308

The financial statements were approved by the Board of Trustees on 8th January 2026.



Jamie C Peters
Chair of Trustees

THE ROSE AND DAISY FOUNDATION

England & Wales - Charity number 1184999

Accounts



(A Charitable Incorporated Organisation)

**TRUSTEES ANNUAL REPORT AND FINANCIAL
STATEMENT FOR PERIOD 1ST April 2023 to 31ST MARCH 2024**

Registered charity number: 1184999

The Rose and Daisy Foundation

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees

Mr Jamie Peters (Chair)
Mrs Hannah Peters
Mr Thomas Nevett

Principal Office

2 Astley Road
The Oakalls
Bromsgrove
B60 2RS

Charity Number

1184999

Website

roseanddaisyfoundation.org

TRUSTEES REPORT

For period ending 31st March 2024

The trustees present their report and accounts for the year ended 31 March 2024.

Structure, Governance and Management

The charity is governed by its Constitution as a Charitable Incorporated Organisation dated 20th April 2019 and managed by a Board of Trustees.

Trustees meet in person or digitally where required to consider the charities performance; fund raising initiatives; governance reviews; establishment of appropriate policies and all new fundraising drives/campaigns.

New trustees are appointed for a term of three years and are inducted through meetings with the Trustees to explain the charity's strategy, policies and procedures.

All trustees are provided with a copy of the constitution, latest Trustees' Annual Report and Financial Statements.

All trustees give their time freely and none receive any form of remuneration.

Objectives and Activities

The objects of the CIO as stated in the constitution are:

To relieve the emotional and physical distress of parents and their families that have experienced the death of a baby through neonatal loss, infant loss, stillbirth or miscarriage or have a baby in intensive care throughout Worcestershire and the West Midlands by:

- a) Supporting parents whilst currently in hospital with their children and providing helping when required.
- b) Supporting and promoting information to parents who have experienced the loss of a child.
- c) To promote cross trust communication to prevent parents who have experienced a loss or who are in hospital receiving letters, phone calls etc. about subject such as post-natal checks.
- d) To make donations to other charitable causes that have similar objectives to ours, if deemed acceptable by our trustees.
- e) To make grants to any medical research that is deemed acceptable by our trustees.

The Rose and Daisy Foundation

- f) Working with trusts to ensure care given to bereaved parents is universal and to the same standard across trusts.

Public Benefit

The trustees have taken due regard of the Charity Commissioners guidance on public benefit when reviewing its aims and objectives and planning future activities.

The trustees are satisfied that the charity and its aims meet the Charity Commission's guidelines for public benefit.

Achievements and Performance

The trustees are happy to report that the support groups which began in 2021 have continued throughout the 2023/2024 year and are still being well received by all who attend. Numbers are starting to dip in attendance for these groups.

The charity has continued to supply its parent well-being boxes to hospitals and this year has seen over 120 boxes and 40 parent well-being journals (individually sent as requested from a hospital) distributed. We have been receiving feedback directly from end users of the boxes and they are being very well received.

The Charity football team Rose and Daisy FC has continued to grow from strength to strength. More bereaved men are joining the team as well as others who haven't experienced baby loss but would like to support the charity. The charity has continued with its decision to subsidise bereaved fathers kits.

Due to personal reasons of Hannah and Jamie, who carry out the day to day running of the charity and its activities, the charity has had a year of reduced fundraising activity. The decision was also made to pause the Memory bears provided by the charity due to the time it takes for their production. It has been decided to start looking for a supplier for the bears to be manufactured at a larger scale. This search has begun and will continue into 2024/2025 with a few different suppliers already being identified as a potential partner.

Next year the charity wishes to continue its search for a Memory bear supplier to be able to offer this service once again. The support groups will continue and we will be looking to expand our support services further.

The Rose and Daisy Foundation

Financial Review

The trustees feel the fundraising the charity has undertaken during this year has been as expected with the reduced activity previously stated. We have utilised the remainder of the Parent well-being project funds of £1,846.

The charity this year has seen a reduction in in donations from the general public and also commercial partner. This was to be expected from the reduced activity. Total raised funds from donations has totalled £4,445.

The charity only ran a single fundraising event early in 2024 due to reduced activity. This has bought in £300.

Unrestricted Funds and Reserves Policies

Unrestricted Funds are spent or applied at the discretion of the trustees to fund any of the charity's aims and activities.

The trustees may choose to designate a part of the Unrestricted Funds to be used for a particular future project or commitment. Such a Designated Fund remains part of the Unrestricted Funds of the charity.

The trustees will regularly review the charity's need for adequate reserves in the light of the changing risks of the organisation.

The unrestricted funds of the charity this year stood at £25,308 at the end of the period (31st March 2024)

The Rose and Daisy Foundation

Restricted Funds

The trustees will continue to monitor the usage of the funds and have agreed that where funds will not be used in full during the accounting year, it is possible to defer income into the next accounting period for use.

This year the charity has utilised the remaining £1,846 on the parent well-being project.

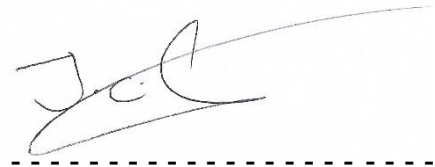
The restricted funds of the charity stood at £0 at the end of the period (31st March 2024)

Independent Examination of Financial Statements

Gross Income during the reporting period was less than an annual rate of £25,000 and therefore, the trustees have elected to take advantage of sections 144 & 145 of the Charities Act 2011 in not submitting these Financial Statements to audit or independent examination. No such examination is required by the charity's Constitution.

The Rose and Daisy Foundation

The Trustees' Report was adopted by the Board of Trustees on 6th January 2025.

A handwritten signature in black ink, appearing to read 'J.C.P.', is written above a horizontal dashed line.

Jamie C Peters
Chair of Trustees

STATEMENT OF TRUSTEE'S RESPONSIBILITIES
For period ending 31st March 2024

The trustees are responsible for the preparation of the trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards.

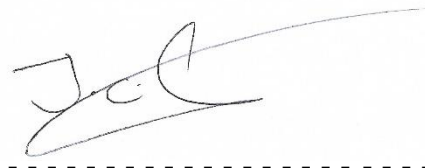
The trustees are required to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity as at the balance sheet date and of its income and expenditure for the period ended on that date. In preparing financial statements the trustees are required to –

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and,
- Prepare the financial statements on the going concern basis unless it is inappropriate to assume that the charity will continue in operation.

The trustees are responsible for maintaining such proper accounting records as are necessary to disclose with reasonable accuracy and at any time the financial position of the charity. The trustees are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees confirm that they have complied with these requirements.

Signed on their behalf on 6th January 2025.



Jamie C Peters
Chair of Trustees

STATEMENT OF FINANCIAL ACTIVITIES

For period ending 31st March 2024

	2024	2023
	£	£
Receipts		
Donations, legacies and grants	4,445	13,376
Fundraising events	300	6,336
Restricted Fund Grants	1,846	3,533
Total Receipts	6,592	23,245
Payments		
Cost of fundraising events	623	5,255
Governance costs	705	2,184
Cost of charitable activities	127	3,102
Purchase Equipment & Supplies	0	2,626
Restricted Fund Activity	1,846	3,533
Total Payments	3,301	16,700
Surplus for the year carried to unrestricted funds	3,290	6,545
Funds brought forward on 1st April	22,017	12,082
Funds carried forward as of 31st March	25,308	22,017


The statement of financial activities includes all gains and losses during the period.

The Rose and Daisy Foundation

BALANCE SHEET
as of 31st March 2024

	2024	2023
	£	£
Fixed Assets		
Computers and technical equipment	0	0
Furniture, fixtures and fittings	0	0
Other equipment and assets	0	0
Current Assets		
Cash in hand and at bank	25,308	22,017
Net Assets	25,308	22,017
Funds and Reserves		
Unreserved fund	25,308	22,017
Total funds and reserves	25,308	22,017

The financial statements were approved by the Board of Trustees on 6th January 2025.



Jamie C Peters
Chair of Trustees

THE ROSE AND DAISY FOUNDATION

England & Wales - Charity number 1184999

Accounts



(A Charitable Incorporated Organisation)

**TRUSTEES ANNUAL REPORT AND FINANCIAL
STATEMENT FOR PERIOD 1ST April 2022 to 31st MARCH 2023**

Registered charity number: 1184999

The Rose and Daisy Foundation

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mr Jamie Peters (Chair) Mrs Hannah Peters Mr Thomas Nevett Mrs Donna Smith Miss Lauren Bennet Mrs Rachel Badger
Principal Office	2 Astley Road The Oakalls Bromsgrove B60 2RS
Charity Number	1184999
Website	roseanddaisyfoundation.org

TRUSTEES REPORT

For period ending 31st March 2023

The trustees present their report and accounts for the year ended 31 March 2023.

Structure, Governance and Management

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New trustees are appointed for a term of three years and are inducted through meetings with the Trustees to explain the charity's strategy, policies and procedures.

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All trustees give their time freely and none receive any form of remuneration.

Objectives and Activities

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To relieve the emotional and physical distress of parents and their families that have experienced the death of a baby through neonatal loss, infant loss, stillbirth or miscarriage or have a baby in intensive care throughout Worcestershire and the West Midlands by:

- a) Supporting parents whilst currently in hospital with their children and providing helping when required.
- b) Supporting and promoting information to parents who have experienced the loss of a child.
- c) To promote cross trust communication to prevent parents who have experienced a loss or who are in hospital receiving letters, phone calls etc. about subject such as post-natal checks.
- d) To make donations to other charitable causes that have similar objectives to ours, if deemed acceptable by our trustees.
- e) To make grants to any medical research that is deemed acceptable by our trustees.

The Rose and Daisy Foundation

- f) Working with trusts to ensure care given to bereaved parents is universal and to the same standard across trusts.

Public Benefit

The trustees have taken due regard of the Charity Commissioners guidance on public benefit when reviewing its aims and objectives and planning future activities.

The trustees are satisfied that the charity and its aims meet the Charity Commission's guidelines for public benefit.

Achievements and Performance

The trustees are happy to report that the support groups which began in 2021 have continued to grow month to month and are still being held monthly.

The charity held its 3rd Roses Route event in February 2023. Unfortunately the event received a further reduction in support than in 2022 and as such wont be returning in 2023 until the event has been reviewed and discussed on ways to move forward with it.

The charity has continued to supply its parent well-being boxes to hospitals and this year alone has seen over 200 boxes and 75 parent well-being journals(individually sent as requested from a hospital) distributed. We continue to receive positive feedback from bereavement midwives on their usage.

December saw us host our 3rd annual Winter Wonderland ball. Although our numbers were lower than our previous year, our guests still had an amazing experience and as predicted with the additional expenditure from last years event this years expenditure was much lower and as a result we raised over £6,000.

This year saw the charity form Rose and Daisy FC. A football team aimed at providing support targeted at dads and male family members as a support system. The team also comprises of player wanting to support the charity as the team plays In charity games to raise funds. The team required startup funds for items such as balls, medical supplies and kit to name a few items. This was a total cost of £1,200 however the team raised over £1,000 in its first game! The team has created a positive environment for supporting families and we are thrilled to continue with this as an activity in which the charity will support. The team has also managed to become independent from the charity financially after the initial startup but the trustees note that it was decided to subsidise bereaved fathers kit as and when they join the team.

Next year the charity wishes to continue to expand its visibility at community events and also expand our awareness. We also wish to expand our activities to support fathers/male family members in different ways that will encourage them to reach out and get support.

The Rose and Daisy Foundation

The trustees note the delay and late return of this annual report and financial submission. This is due to schedule conflicts and delayed availability. The trustees would like to note these reports will be created and filed much closer to year end in the coming years.

The Rose and Daisy Foundation

Financial Review

The trustees feel the fundraising the charity has undertaken during this year has been as expected and we have utilised £3,533 of our previous National Lottery Community Fund grant on the Parent well-being project with the remaining £1,846 planned to be spent during early 2023/2024.

The charity this year has seen another increase in in donations from the general public and also commercial partners most notably from Tricas Construction who raised £4,149. Total raised funds from donations has totalled £13,376.

The charity continues to run its own individual fundraising events for example The Winter Wonderland Ball and Roses Route. These activities will continue to form a key part of the charities ability to raise both financial funds and also increase awareness of the charity. This has bought in over £6,000.

The charity has used some of the capital this year to invest in new charity football team which aims to support dads and male family members whilst raising funds for the charity.

Unrestricted Funds and Reserves Policies

Unrestricted Funds are spent or applied at the discretion of the trustees to fund any of the charity's aims and activities.

The trustees may choose to designate a part of the Unrestricted Funds to be used for a particular future project or commitment. Such a Designated Fund remains part of the Unrestricted Funds of the charity.

The trustees will regularly review the charity's need for adequate reserves in the light of the changing risks of the organisation.

The trustees would like to note on last year's unrestricted funds statement that the figure was incorrect as it was not updated from the previous years statement. As such the trustees would like to note that last years unrestricted funds stood at £12,082.15 at the end of the period (31st March 2022)

The unrestricted funds of the charity this year stood at £22,017.91 at the end of the period (31st March 2023)

Restricted Funds

The trustees will continue to monitor the usage of the funds and have agreed that where funds will not be used in full during the accounting year, it is possible to defer income into the next accounting period for use.

The Rose and Daisy Foundation

This year the charity has utilised £3,533 on the parent well-being project. As a result all remaining funds of the grant will not be used in year two and £1,846 should be deferred to 2023/2024.

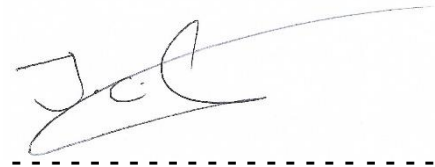
The restricted funds of the charity stood at £1,846 at the end of the period (31st March 2023)

Independent Examination of Financial Statements

Gross Income during the reporting period (including the exclusion of deferred income) was less than an annual rate of £25,000 and therefore, the trustees have elected to take advantage of sections 144 & 145 of the Charities Act 2011 in not submitting these Financial Statements to audit or independent examination. No such examination is required by the charity's Constitution.

The Rose and Daisy Foundation

The Trustees' Report was adopted by the Board of Trustees on 2nd February 2023.

A handwritten signature in black ink, appearing to read 'J.C.P.', is written above a horizontal dashed line.

Jamie C Peters
Chair of Trustees

STATEMENT OF TRUSTEE'S RESPONSIBILITIES
For period ending 31st March 2022

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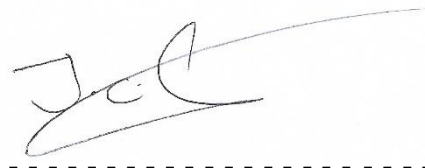
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The trustees confirm that they have complied with these requirements.

Signed on their behalf on 2nd February 2023.



Jamie C Peters
Chair of Trustees

STATEMENT OF FINANCIAL ACTIVITIES
For period ending 31st March 2021


	2023	2022
	£	£
Receipts		
Donations, legacies and grants	13,376	9,303
Fundraising events	6,336	6,851
Restricted Fund Grants	3,533	4,607
Total Receipts	23,245	20,761
Payments		
Cost of fundraising events	5,255	6,534
Governance costs	2,184	1,587
Cost of charitable activities	3,102	2,194
Purchase Equipment & Supplies	2,626	300
Restricted Fund Activity	3,533	4,607
Total Payments	16,700	13,219
Surplus for the year carried to unrestricted funds	6,545	5,542
Funds brought forward on 1st April	12,082	6,682
Funds carried forward as of 31st March	22,017	12,082

The statement of financial activities includes all gains and losses during the period.

BALANCE SHEET
as of 31st March 2021

	2023	2022
	£	£
Fixed Assets		
Computers and technical equipment	0	0
Furniture, fixtures and fittings	0	0
Other equipment and assets	0	0
Current Assets		
Cash in hand and at bank	22,017	12,085
Net Assets	22,017	12,085
Funds and Reserves		
Unreserved fund	22,017	12,085
Total funds and reserves	22,017	12,085

The financial statements were approved by the Board of Trustees on 2nd February 2023.



Jamie C Peters
Chair of Trustees

THE ROSE AND DAISY FOUNDATION

England & Wales - Charity number 1184999

Accounts



(A Charitable Incorporated Organisation)

**TRUSTEES ANNUAL REPORT AND FINANCIAL
STATEMENT FOR PERIOD 1ST April 2021 to 31ST MARCH 2022**

Registered charity number: 1184999

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mrs Amanda Russell Mr Andrew Hudson Mrs Hannah Peters Mr Jamie Peters (Chair) Miss Tamsin Dalton Mr Thomas Nevett Mrs Donna Smith Miss Lauren Bennet
Principal Office	2 Astley Road The Oakalls Bromsgrove B60 2RS
Charity Number	1184999
Website	roseanddaisyfoundation.org

TRUSTEES REPORT

For period ending 31st March 2021

The trustees present their report and accounts for the year ended 31 March 2021.

Structure, Governance and Management

The charity is governed by its Constitution as a Charitable Incorporated Organisation dated 20th April 2019 and managed by a Board of Trustees.

Trustees meet in person or digitally where required to consider the charities performance; fund raising initiatives; governance reviews; establishment of appropriate policies and all new fundraising drives/campaigns.

New trustees are appointed for a term of three years and are inducted through meetings with the Trustees to explain the charity's strategy, policies and procedures.

All trustees are provided with a copy of the constitution, latest Trustees' Annual Report and Financial Statements.

All trustees give their time freely and none receive any form of remuneration.

Objectives and Activities

The objects of the CIO as stated in the constitution are:

To relieve the emotional and physical distress of parents and their families that have experienced the death of a baby through neonatal loss, infant loss, stillbirth or miscarriage or have a baby in intensive care throughout Worcestershire and the West Midlands by:

- a) Supporting parents whilst currently in hospital with their children and providing helping when required.
- b) Supporting and promoting information to parents who have experienced the loss of a child.
- c) To promote cross trust communication to prevent parents who have experienced a loss or who are in hospital receiving letters, phone calls etc. about subject such as post-natal checks.
- d) To make donations to other charitable causes that have similar objectives to ours, if deemed acceptable by our trustees.
- e) To make grants to any medical research that is deemed acceptable by our trustees.

The Rose and Daisy Foundation

- f) Working with trusts to ensure care given to bereaved parents is universal and to the same standard across trusts.

Public Benefit

The trustees have taken due regard of the Charity Commissioners guidance on public benefit when reviewing its aims and objectives and planning future activities.

The trustees are satisfied that the charity and its aims meet the Charity Commission's guidelines for public benefit.

Achievements and Performance

2021/2022 saw the tail end of the Covid-19 pandemic and featured lockdowns and a return to "normal" life for everyone. The Rose and Daisy Foundation complied with all regulations during lockdowns and all guidance post lockdown.

The trustees are pleased to report that the charity managed to continue supporting parents and families throughout the duration of the pandemic by continuing support via digital means as identified in our previous year to comply with regulations.

2021 saw the start of The Rose and Daisy Foundation monthly support groups. These groups are informal gatherings of bereaved parents and family members and offer a safe space to discuss their experiences or just a general chat about current affairs which helps to create a relaxed environment for all attendees.

The charity held its 2nd Roses Route event in February 2021 hoping to continue the success of the previous year. Unfortunately the event wasn't as successful as the previous years event but still raised £490. We feel the lower entrants was due to the pandemic restrictions being removed at the time of the event.

At the end of last year the charity began developing our parent well-being boxes and early this year they were completed and we have distributed them to multiple hospitals across the west midlands and Worcestershire regions. Each box is given to parents after the loss of their baby and contain: 2 Parent well-being journals (Developed by The Rose and Daisy Foundation), 2 pens, a pack of colouring pencils, 3 crochet hearts, 2 tealights and a pack for leaflets including leaflets from The Rose and Daisy Foundation including a baby details book and support guidance both developed by the charity. The feedback from both parents and bereavement team staff to the hospitals has been overwhelmingly positive and to date we have distributed 100 boxes and 25 parent well-being journals. The charity plans to keep providing these boxes and aims to expand to more hospitals across the region in the coming years.

As the covid restrictions had been lifted by December we held our 2nd Winter Wonderland Ball. This year we moved to a new venue which made the event bigger and better than our previous year. We welcomed 150 guests to Grafton Manor Hotel

The Rose and Daisy Foundation

in Bromsgrove. All guests enjoyed a three course meal and had opportunity to take part in our raffle while being entertained with live music and a DJ. The events was a great success and while our expenditure for the event was large, this ensured our outgoings for future years would be reduced as we purchased items that will be used for years to come at the event. The ball raised over £6,500 which was fantastic for the charity.

Next year the charity wishes to expand its visibility at community events and also expand our awareness. We also wish to expand out activities to support fathers/male family members in different ways that will encourage them to reach out and get support.

The Rose and Daisy Foundation

Financial Review

The trustees feel the fundraising the charity has undertaken during this year has been as expected and boosted significantly by The National Lottery Community Fund Grant of £9,986. We have utilised £4,606 of this grant on the Parent well-being project with the remainder planned to be spent during 2022/2023.

The charity this year has seen an increase in in donations from the general public most notably from individuals with no previous connection to the charity completing events such as sponsored runs and coffee mornings. This has raised a total of £9,302.

The charity continues to run it's own individual fundraising events for example The Winter Wonderland Ball and Roses Route. These activities will continue to form a key part of the charities ability to raise both financial funds and also increase awareness of the charity. This has bought in a total of £6,851.

The charity has used some of the capital this year to invest in assets for the charities use in key fundraising events such as The Winter Wonderland Ball and local community events.

The charity continues to look for ways to improve the ongoing monitoring of the financial status and following a review of available accounting software's, the trustees have taken the decision to continue the current accounting practice (Excel). This has been based predominantly on the unnecessary additional expenditure the charity would face. It is also noted that a small number of receipts for goods purchased are unavailable, however, this has been noted as a key principle going forward with all expenditure having an accompanying receipt/invoice for goods/services over the value of £50.

Unrestricted Funds and Reserves Policies

Unrestricted Funds are spent or applied at the discretion of the trustees to fund any of the charity's aims and activities.

The trustees may choose to designate a part of the Unrestricted Funds to be used for a particular future project or commitment. Such a Designated Fund remains part of the Unrestricted Funds of the charity.

The trustees will regularly review the charity's need for adequate reserves in the light of the changing risks of the organisation.

The charity has decided to change the accounting approach/principles for this financial year and all the years there after to help simplify the management and reporting of the accounts, and will therefore not include things such as fixed assets. The charity accounting principles will be based on income and expenditure only.

The Rose and Daisy Foundation

The unrestricted funds of the charity stood at £7,475.31 at the end of the period (31st March 2022)

Restricted Funds

Following the National Lottery Community Grant application being successful the charity have decided to separate these funds out to be used for restricted activities. This is in line with the application to gain the grant and it's limited use.

The trustees will continue to monitor the usage of the funds and have agreed that where funds will not be used in full during the accounting year, it is possible to defer income into the next accounting period for use.

This year the charity has utilised £4,606 on the parent well-being project. As a result all funds of the grant will not be used in year one and £5,379 should be deferred to 2022/2023.

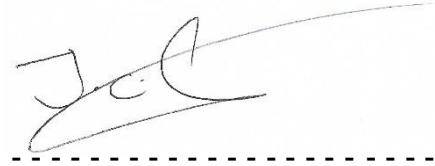
The restricted funds of the charity stood at £5,379 at the end of the period (31st March 2022)

Independent Examination of Financial Statements

Gross Income during the reporting period (including the exclusion of deferred income) was less than an annual rate of £25,000 and therefore, the trustees have elected to take advantage of sections 144 & 145 of the Charities Act 2011 in not submitting these Financial Statements to audit or independent examination. No such examination is required by the charity's Constitution.

The Rose and Daisy Foundation

The Trustees' Report was adopted by the Board of Trustees on 15th December 2022.

A handwritten signature in black ink, appearing to read 'J.C.P.', is written above a horizontal dashed line.

Jamie C Peters
Chair of Trustees

STATEMENT OF TRUSTEE'S RESPONSIBILITIES
For period ending 31st March 2021

The trustees are responsible for the preparation of the trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards.


The trustees are required to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity as at the balance sheet date and of its income and expenditure for the period ended on that date. In preparing financial statements the trustees are required to –

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and,
- Prepare the financial statements on the going concern basis unless it is inappropriate to assume that the charity will continue in operation.

The trustees are responsible for maintaining such proper accounting records as are necessary to disclose with reasonable accuracy and at any time the financial position of the charity. The trustees are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees confirm that they have complied with these requirements.

Signed on their behalf on 15th December 2022.



Jamie C Peters
Chair of Trustees

STATEMENT OF FINANCIAL ACTIVITIES
For period ending 31st March 2021

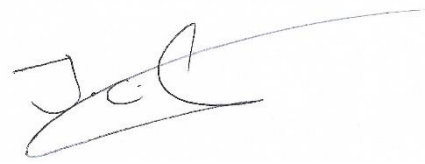
	2022	2021
	£	£
Receipts		
Donations, legacies and grants	9,303	6,383
Fundraising events	6,851	4,331
Restricted Fund Grants	4,607	-
Total Receipts	20,761	10,714
Payments		
Cost of fundraising events	6,534	716
Governance costs	1,584	1,447
Cost of charitable activities	2,194	4,594
Purchase Equipment & Supplies	300	1,444
Restricted Fund Activity	4,607	
Total Payments	13,219	8,201
Surplus for the year carried to unrestricted funds	5,542	2,513
Funds brought forward on 1st April	6,682	4,169
Funds carried forward as of 31st March	12,082	4,169

The statement of financial activities includes all gains and losses during the period.

BALANCE SHEET
as of 31st March 2021

	2022	2021
	£	£
Fixed Assets		
Computers and technical equipment	0	1,119
Furniture, fixtures and fittings	0	560
Other equipment and assets	0	792
Current Assets		
Cash in hand and at bank	12,085	6,682
Net Assets	12,085	9,193
Funds and Reserves		
Unreserved fund	12,085	6,682
Total funds and reserves	12,085	6,682

The financial statements were approved by the Board of Trustees on 15th December 2022.



Jamie C Peters
Chair of Trustees

THE ROSE AND DAISY FOUNDATION

England & Wales - Charity number 1184999

Accounts



(A Charitable Incorporated Organisation)

**TRUSTEES ANNUAL REPORT AND FINANCIAL
STATEMENT FOR PERIOD 1ST April 2020 to 31ST MARCH 2021**

Registered charity number: 1184999

The Rose and Daisy Foundation

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mrs Amanda Russell Mr Andrew Hudson Mrs Hannah Peters Mr Jamie Peters (Chair) Miss Tamsin Dalton Mr Thomas Nevett
Principal Office	2 Astley Road The Oakalls Bromsgrove B60 2RS
Charity Number	1184999
Website	roseanddaisyfoundation.org

TRUSTEES REPORT

For period ending 31st March 2021

The trustees present their report and accounts for the year ended 31 March 2021.

Structure, Governance and Management

The charity is governed by its Constitution as a Charitable Incorporated Organisation dated 20th April 2019 and managed by a Board of Trustees.

Trustees meet in person or digitally where required to consider the charities performance; fund raising initiatives; governance reviews; establishment of appropriate policies and all new fundraising drives/campaigns.

New trustees are appointed for a term of three years and are inducted through meetings with the Trustees to explain the charity's strategy, policies and procedures.

All trustees are provided with a copy of the constitution, latest Trustees' Annual Report and Financial Statements.

All trustees give their time freely and none receive any form of remuneration.

Objectives and Activities

The objects of the CIO as stated in the constitution are:

To relieve the emotional and physical distress of parents and their families that have experienced the death of a baby through neonatal loss, infant loss, stillbirth or miscarriage or have a baby in intensive care throughout Worcestershire and the West Midlands by:

- a) Supporting parents whilst currently in hospital with their children and providing helping when required.
- b) Supporting and promoting information to parents who have experienced the loss of a child.
- c) To promote cross trust communication to prevent parents who have experienced a loss or who are in hospital receiving letters, phone calls etc. about subject such as post-natal checks.
- d) To make donations to other charitable causes that have similar objectives to ours, if deemed acceptable by our trustees.
- e) To make grants to any medical research that is deemed acceptable by our trustees.

The Rose and Daisy Foundation

- f) Working with trusts to ensure care given to bereaved parents is universal and to the same standard across trusts.

Public Benefit

The trustees have taken due regard of the Charity Commissioners guidance on public benefit when reviewing its aims and objectives and planning future activities.

The trustees are satisfied that the charity and its aims meet the Charity Commission's guidelines for public benefit.

Achievements and Performance

2020/2021 has been a difficult year for everyone due to the Covid-19 pandemic and The Rose and Daisy Foundation has also felt the effects of this. With this in mind the trustees feel the charity has exceeded all expectations for the past year.

The trustees are pleased to report that the charity managed to continue supporting parents and families throughout the duration of the pandemic by exploring new options for support including online support for parents and their families.

All events were cancelled during this period to comply with government guidelines.

The charity created a new event to help boot fundraising in such a difficult time. Roses Route was a challenge that people could undertake at home and during their exercise time all within the government guidelines. The challenge was to walk, run or cycle 29.2 miles over 13 days. The event was a huge success and we managed to raise over £4,000 for the charity.

In August 2020 the charity founders (Hannah & Jamie Peters) sadly lost their second child Daisy Rose-Ellis Peters. The trustees decided that it was fitting that the charity was to change its name to honour both of their daughters and The Rose Peters Foundation become The Rose and Daisy Foundation.

At the end of the year the charity had begun to develop our new Parent Well-Being boxes. These boxes are intended to be a support aid for parents after the loss of a child/children. The boxes are in the early stage of development and will be launched in later in 2021.

The Rose and Daisy Foundation

Financial Review

The trustees feel the fundraising the charity has undertaken during this unusual year has been above all expectations.

The charity has had a significant amount of support from the general public for fundraising this year given the extraordinary situation. Roses Route was our main fundraising activity during this time and raised £4,373.54

The trustees note that there have been some higher governance costs as the charity has worked to rebrand with the new name.

Unrestricted Funds and Reserves Policies

Unrestricted Funds are spent or applied at the discretion of the trustees to fund any of the charity's aims and activities.

The trustees may choose to designate a part of the Unrestricted Funds to be used for a particular future project or commitment. Such a Designated Fund remains part of the Unrestricted Funds of the charity.

The trustees will regularly review the charity's need for adequate reserves in the light of the changing risks of the organisation

The unrestricted funds of the charity stood at £6,682.00 at the end of the period (31st March 2021)

Restricted Funds

Funds held by the charity on specific trusts under charity law are classed as Restricted Funds. The charity holds no Restricted Funds.

Independent Examination of Financial Statements

Gross Income during the reporting period was less than an annual rate of £25,000 and therefore, the trustees have elected to take advantage of sections 144 & 145 of the Charities Act 2011 in not submitting these Financial Statements to audit or independent examination. No such examination is required by the charity's Constitution.

The Rose and Daisy Foundation

The Trustees' Report was adopted by the Board of Trustees on 22nd June 2021.

A handwritten signature in black ink, appearing to read 'J.C.P.', is written above a horizontal dashed line.

Jamie C Peters
Chair of Trustees

STATEMENT OF TRUSTEE'S RESPONSIBILITIES
For period ending 31st March 2021

The trustees are responsible for the preparation of the trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards.

The trustees are required to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity as at the balance sheet date and of its income and expenditure for the period ended on that date. In preparing financial statements the trustees are required to –

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and,
- Prepare the financial statements on the going concern basis unless it is inappropriate to assume that the charity will continue in operation.

The trustees are responsible for maintaining such proper accounting records as are necessary to disclose with reasonable accuracy and at any time the financial position of the charity. The trustees are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees confirm that they have complied with these requirements.

Signed on their behalf on 22nd June 2021



Jamie C Peters
Chair of Trustees

STATEMENT OF FINANCIAL ACTIVITIES
For period ending 31st March 2021

	2021	2020
	£	£
Receipts		
Donations, legacies and grants	6,383	5,108
Fundraising events	4,331	6,632
Total Receipts	10,714	11,740
Payments		
Cost of fundraising events	716	4,483
Governance costs	1,447	694
Cost of charitable activities	4,594	1,367
Purchase of fixed assets	1,444	1,027
Total Payments	8,201	8,308
Surplus for the year carried to unrestricted funds	2,513	4,169
Funds brought forward on 1st April	4,169	-
Funds carried forward as of 31st March	6,682	4,169

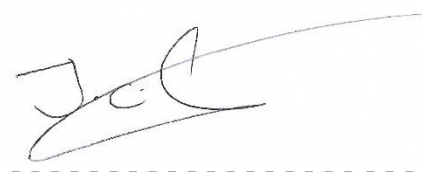
The statement of financial activities includes all gains and losses during the period.

The Rose and Daisy Foundation

BALANCE SHEET
as of 31st March 2021

	2021 £	2020 £
Fixed Assets		
Computers and technical equipment	1,119	359
Furniture, fixtures and fittings	560	125
Other equipment and assets	792	543
Current Assets		
Cash in hand and at bank	6,682	4,169
Net Assets	9,193	5,196
Funds and Reserves		
Unreserved fund	6,682	4,169
Total funds and reserves	6,682	4,169

The financial statements were approved by the Board of Trustees on 22nd June 2021



Jamie C Peters
Chair of Trustees