



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **5/02/2020** **To** **31/03/2021**

Charity name: **SAXON GROUP RIDING FOR THE DISABLED ASSOCIATION
INCORPORATING CARRIAGE DRIVING:
BRADFORD ON AVON.**

Charity registration number: **1187766**

Objectives and Activities:

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| Summary of the purposes of the charity as set out in its governing document | <p>Saxon Group RDA provides therapeutic horse riding for Adults and Children with physical or learning disabilities, including all autistic spectrum disorders.</p> <p>Horse riding provides opportunities for improved physical and mental wellbeing through therapy, enjoyment, skill development and achievement.</p> <p>Saxon Group RDA specialises in riding, dressage, show jumping and endurance activities and is completely volunteer run.</p> |
| 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. | <p>Saxon Group RDA are based at Widbrook Equestrian Centre in Bradford on Avon and operate on one day a week. We currently own 5 equines who are trained in our activities as listed below:</p> <ul style="list-style-type: none">• Horse riding, including both coached individual and group lessons and therapy riding to provide physical exercise to improve physical and mental well-being and build confidence.• Stable management sessions to encourage participation and knowledge of horse care.• Horse Grooming to encourage further interaction with equines, and build a greater rapport, understanding and confidence with them.• Proficiency Sessions to encourage additional learning and skill development to support the other "hands-on" activities.• Session are subject to a small fee in order to support the cost of horse upkeep, including, but not limited to, livery costs, venue hire, feed, tack, veterinary dentist, physiotherapy and farrier care and insurances. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit | <p>The Trustees have, at all times, taken due regard to the guidance issued by the Charity Commission on public benefit requirement.</p> |

Additional information (optional)

You may choose to include further statements where relevant about:

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| Policy on grant making | Not applicable |
| Policy on social investment including program related investment | Not applicable |
| Contribution made by volunteers | <p>Saxon Group RDA is run entirely by volunteers, without whom it would not be able to function.</p> <p>Volunteers undertake a minimum of two dedicated Training Days a year, plus continuous review, to ensure they continue to follow best practice. Activities they are trained in include:</p> <ul style="list-style-type: none">• Handling equines, including catching, grooming, tacking up, and leading.• Side-walking alongside vulnerable riders to ensure their safety.• Assisting riders to mount and dismount.• Assisting horse grooming and stable management sessions. <p>In addition to assisting with the weekly sessions, our volunteers also help raise awareness of the Groups activities and are enthusiastic in their fundraising activities.</p> |
| Other | |

Achievements and Performance

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| 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. | <p><u>Organisation:</u> At the beginning of this reporting period, Saxon Group RDA became a Charitable Incorporated Organisation (CIO).</p> <p><u>Activities & Achievements 2020-2021</u></p> <p><u>Covid-19</u> Due to the unusual circumstances experienced from March 2020 through to the end of March 2021 as a result of the Covid-19 pandemic, we were not able to operate as usual. We were unable to provide riding, grooming or stable management sessions for much of this period, and as a result, had little or no income from riding fees. We were therefore entirely dependent on fundraising, donations and grants in order to maintain our equines.</p> <p><u>Post Lockdown</u> Once lockdown restrictions lifted, a number of volunteers on a horse-care-rota were able to start a twice daily rota to care for the horses, bringing them in daily to be groomed, checked and ridden. They were carefully and slowly brought back to fitness, to get them used to being handled again ready for when the school could re-open, and this ensured that the horses continued to have a high standard of care, being brought in for regular visits from the farrier, dentist, farrier and equine physiotherapist.</p> <p>Easing of restrictions eventually enabled us to partially open again for some of our riders. The Trustees and Volunteers, following numerous safeguards, risk assessments, session planning, sanitising etc, were able to operate with 8 regular participants, a series of non-riding sessions, including two "meet and greet" events for riders to see the horses.</p> |

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| | <p>These proved emotionally very beneficial to all those who attended, and the riders were clearly very happy to interact with the horses after a long break.</p> <p><u>Summary of Fundraising:</u></p> <p><u>Grants:</u> The Group was lucky to get a Sport England Covid 19 Grant which covered livery costs until the end of 2020, and money from Waitrose Community Matters, along with a grant from the RDA Mid-West Region for cleaning and sanitising products.</p> <p><u>Donations:</u> Just before lockdown, Hardenhuish Secondary School in Chippenham selected us as their charity of the year in memory of a pupil, Ellie Gould. Several Trustees took 2 of the horses to visit the school, along with cakes baked by volunteers for their bake sale. Despite lockdown, the school were able to raise £1,418.00 for us, and our Chairperson thanked them greatly.</p> <p><u>Other Fundraising:</u> Many other fundraising efforts through the year have contributed to the Group staying afloat, with particular thanks to Saxon Dressage Group, the Gibson Bursary, members of Frome Inner Wheel, Trowbride U3A, our riders and their families, along with everyone who has donated to the various campaigns, including to our Chairperson's virtual Land's End to John O'Groats running challenge, and finally, the readers of the Wiltshire Times for all the support received in the wake of the news articles appealing for help with the horses.</p> <p><u>Going Forward:</u></p> <ul style="list-style-type: none"> • The Group will carry on in whatever capacity we are able, to offer riding and therapy to our riders. • We will continue to fundraise to sustain the group and support our horses, to raise awareness and generate support. • We will continue to embrace technology to keep riders and volunteers engaged and up to date with our activities and keep everyone connected and, • most importantly, we will continue to keep everyone safe. |
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Additional information (optional)

You may choose to include further statements where relevant about:

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| Achievements against objectives set | Refer to previous commentary |
| Performance of fundraising activities against objectives set | <p>During Lockdown and immediately afterwards, the Group sadly lost 2 horses due to injury and ill health. Targeted fundraising and grant applications were focussed on securing funds in order to purchase 2 horses to replace these losses.</p> <p>At the end of this reporting period, we were waiting on the results of these applications, and had started searching for suitable horses, as we have assessed that a minimum number of 5 equines are required in order to remain sustainable as a Group.</p> |
| Investment performance against objectives | Refer to previous commentary |
| Other | None |

Financial Review

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| Review of the charity's financial position at the end of the period | <p>At the end of the accounting period, the Group was considered to be in a stable position due to the fundraising efforts, sponsorships, and donations of time or money.</p> <p>Due to the pandemic, income from riders fees was greatly reduced, and greater reliance was put on fundraising and grant applications.</p> <p>The Treasurer gave a comparison between this year and the previous 4 years fundraising efforts to show successful the fundraising has been.</p> <p>2016/17 raised £2,037; 2017/18 raised £5,959; 2018/19 raised £6,100; 2019/20 raised £9,014; 2020/21 raised £14,461</p> <p>The Treasurer closed his report by saying that although things were likely to continue to be tough as a result of the on-going pandemic, he believed that Saxon Group RDA would come out of it in as strong a financial position as was possible in such an unknown climate.</p> |
| Statement explaining the policy for holding reserves stating why they are held | <p>The Group holds reserve funds in a Deposit Account, separate but linked to the everyday Treasurers Account. Funds are set aside to cover unforeseen or unavoidable events such as:</p> <ul style="list-style-type: none"> • Emergency treatment to a sick or injured horse. • The equivalent of 6 months running costs, ie livery, feed, farrier, insurance, etc in case of a sudden and steep drop in income, as experienced at the beginning of Lockdown in March 2020. • Unexpected replacement of broken equipment, tack, rugs etc that are necessary for the carrying out of our activities, or for horse welfare. • Unexpected repairs to essential equipment, such as hoist or trailer. |
| Amount of reserves held | <p>The Group aims to maintain a minimum reserve of £5,000 in the Deposit Account, and a similar amount in the Treasurers Account, with 6 months normal running costs as a minimum.</p> <p>Balances at the end of the current reporting period are:</p> <p><u>Deposit Account: £5,437.48</u> <u>Treasurers Account: £7,156.83</u></p> |
| Reasons for holding zero reserves | <p>Not applicable. Refer to previous commentary.</p> |
| Details of fund materially in deficit | <p>Not applicable</p> |
| Explanation of any uncertainties about the charity continuing as a going concern | <ul style="list-style-type: none"> • The main source of concern for the future of the Group is due to the uncertainty associated with the ongoing effects of the Covid-19 pandemic. • In addition, keeping horses healthy, injury free and sound is essential in order to be able to conduct riding sessions. • Purchase costs of new horses is increasing all the time, particularly following the series of lockdowns, and with each new purchase, the fundraising has to aim higher. • Running costs associated with keeping horses are also increasing, and a small increase in riders fees will be implemented to offset this. • All horses have regular physiotherapy, dentist and farrier visits to maintain their health and soundness, and these costs are also increasing. • Insurance costs increase at every renewal. |

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| | <ul style="list-style-type: none"> • Lack of volunteers is always a concern as a proportionally large number of volunteers are required to assist each individual rider. Following the pandemic, there has been a slight drop in the number of volunteers participating. A recruitment drive to raise more interest is to be planned. |
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Additional information (optional)

You may choose to include further statements where relevant about:

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| The charity's principal sources of funds (including any fundraising) | <ul style="list-style-type: none"> • Riders fees for riding sessions, therapy riding, stable management and proficiency sessions. • Fundraising activities • Grant applications • Gift Aid donations • Other donations |
| Investment policy and objectives including any social investment policy adopted | Not applicable |
| A description of the principal risks facing the charity | Refer to previous commentary |
| Other | Due to the recent loss of 2 horses, the Group will be looking to purchase, or lease if purchase is not feasible, 2 more horses/ponies in order to maintain the number of riding and non-riding sessions for all our participants. |

Structure, Governance and Management

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| Description of charity's trusts: | Not applicable |
| Type of governing document (trust deed, royal charter) | Constitution of the Saxon Riding for the Disabled Association Incorporating Carriage Driving |
| How is the charity constituted? (e.g unincorporated association, CIO) | Saxon Group RDA is now a Charitable Incorporated Organisation (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 | Trustees are elected annually at the AGM, onto the Group's Committee. Once elected, the Trustees elect the Officers from amongst them: <u>The Officers are:</u> Chair Group Organiser / Honorary Secretary <u>Additional Offices</u> Treasurer Horse Welfare Officer Safeguarding Officer Rider Liaison Rider Coordinator Volunteer Coordinator |

Additional information (optional)

You may choose to include further statements where relevant about:

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| 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 | Saxon Group RDA is a member group of RDA UK, which is a network of staff and volunteers that exist to provide direction and support to it's 489 member groups. Saxon Group RDA is part of the 'Mid-West' Region of RDA UK, who provide further guidance on development and direction at a local level, and sits within the 'Wiltshire County' area. |
| Relationship with any related parties | We have a close working relationship with Widbrook Equestrian Centre (WEC) that has been our base for operation for over 40 years. There are signed contracts between Saxon RDA and WEC that govern the loan arrangements for the horses and the contract of use for the hire of facilities. |
| Other | |

Reference and Administrative details

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| Charity name | Saxon Group Riding for the Disabled Association Incorporating Carriage Driving |
| Other name the charity uses | Saxon Group RDA |
| Registered charity number | 1187766 |
| Charity's principal address | Saxon Group Riding for the Disabled Association C/O Widbrook Equestrian Centre Trowbridge Road Bradford on Avon Wiltshire BA15 1UD |

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 | Kady Chatman | Chair | | |
| 2 | Patricia Jane Kimber | Group Organiser | | |
| 3 | Stephen Ashton | Treasurer | | |
| 4 | Joanna Rutherford | Rider Coordinator | | |
| 5 | Avril Richards | Volunteer Coordinator | | |
| 6 | Judy Buxton | Horse Welfare Officer | | |
| 7 | Tessa Stanton | | | |
| 8 | Hollie Drewitt | | 5.02.20 – 19.11.20 | |
| 9 | Donna Turnbull | Safeguarding Officer | 19.11.20 – 31.03.21 | |

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

| Director name | | |
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Name of trustees holding title to property belonging to the charity

| Trustee name | Dates acted if not for whole year | |
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Funds held as custodian trustees on behalf of others

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| Description of the assets held in this capacity | Not applicable |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects | Not applicable |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets | Not applicable |

Additional information (optional)**Names and addresses of advisers (Optional information)**

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

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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

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| Signature(s) |  |  |
| Full name(s) | Kady Chatman | Patricia Jane Kimber |
| Position (eg Secretary, Chair, etc) | Chair of Trustees | Group Organiser |
| Date | 25/03/2021 | |

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| SAXON GROUP RIDING FOR THE DISABLED ASSOCIATION, BRADFORD-ON-AVON. CHARITY NO.1187766 | |
| INCOME AND EXPENDITURE ACCOUNT | |
| FOR THE PART YEAR 5th February 2020 - 31st March 2020 & YEAR 1st April 2020 - 31st March 2021 | |
| <u>TREASURERS ACCOUNT</u> | |
| <u>Income: 05/02/2020 - 31/03/2021</u> | <u>Total</u> |
| Riding Fees | £1,975.00 |
| Gift Aid / donations | £2,770.10 |
| Donations/Grants Received : | £14,641.40 |
| Miscellaneous Income/competitions | £4,274.41 |
| Income | £23,660.91 |
| <u>Expenditure: 05/02/2020 - 31/03/2021</u> | |
| <u>Total</u> | |
| Widbook Equestrian Centre Venue Hire | £2,644.82 |
| Affiliation Fee & Insurance/Misc; | £3,208.31 |
| Competition fees & Expenses | £108.00 |
| Horse Expenses | £9,931.10 |
| Misc: Expense | £4,117.04 |
| Expenditure | £20,009.27 |
| Excess/(Deficit) of Income over Expenditure | £3,651.64 |
| <u>DEPOSIT ACCOUNT</u> | |
| <u>Total</u> | |
| Interest | £1.53 |
| HMRC | £679.13 |
| Income | £680.66 |
| Income 05/02/2020 - 31/03/2021 | |
| Overall Final Income | £24,341.57 |
| Overall Final Expenditure | £20,009.27 |
| <u>Funds brought forward</u> | |
| Treasurers Account | £3,651.64 |
| Deposit Account | £680.66 |
| <u>Final Balances at year end 31.03.2021</u> | |
| Treasurers Account | £7,156.83 |
| Deposit Account | £5,437.48 |
| <u>Overall Final Balances (Treasurers & Deposit Accounts)</u> | £12,594.31 |