



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **1/04/2021** **To** **31/03/2022**

Charity name: **SAXON GROUP RIDING FOR THE DISABLED ASSOCIATION**
 INCORPORATING CARRIAGE DRIVING

Charity registration number: **1187766**

Objectives and Activities

Summary of the purposes of the charity as set out in its governing document	Saxon Group RDA provides therapeutic horse riding and non-riding activities for Adults and Children with physical or learning disabilities, including all autistic spectrum disorders. Horse riding provides opportunities for improved physical and mental wellbeing through therapy, enjoyment, skill development and achievement. Saxon Group RDA specialises in riding, dressage, show jumping and endurance activities and is completely volunteer run.
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, shared 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	The Trustees have, at all times, taken due regard to the guidance issued by the Charity Commission on public benefit requirement.

Additional information (optional)

You may choose to include further statements where relevant about:

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.• First Aid• Safeguarding <p>In addition to assisting with the weekly sessions, our volunteers also help raise awareness of the Group's activities and are enthusiastic in their fundraising activities.</p>
Other	

Achievements and Performance

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>Activities & Achievements: 2021-2022</u></p> <p>Since lockdown restrictions were lifted, the Group was able to fully open up again to existing and new participants and resume riding and therapy sessions.</p> <p>There has been a significant increase in interest for non-riding activities (eg stable management, grooming, proficiency and knowledge), and these have now become an integral part of the activities offered by the Group. By the end of the year, we were able to offer riding and therapy riding to a total of 27 participants, and grooming, horsecare and stable management to an additional 6 participants. It is hoped that these numbers will continue to increase through 2022-2023.</p> <p>The Group has also benefitted from a number of new volunteers, which has allowed us to re-structure the sessions to give either 1 to 1 or shared coaching for all ridden and therapy sessions. This has had the additional benefit of allowing horses and volunteers to have a brief rest between sessions.</p> <p>We were also able to loan 2 additional ponies for grooming and horsecare sessions, which have enabled us to offer more of these sessions to both children and adults. These sessions have proved very beneficial for participants, who have enjoyed the close interaction with the ponies. For participants either unable to ride or waiting for a suitable space to become available, we are able to</p>
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	<p>offer sessions on a small “mechanical horse” where they can carry out exercises to help maintain their fitness.</p> <p>In the summer, and with very little practice, the Group entered 6 riders in the “RDA Virtual Regional Championships”. Filming was carried out with very little preparation, but the results were very impressive. 4 of our entrants won their classes and went on to be filmed for the “RDA Virtual National Championships”.</p> <p><u>Fundraising:</u></p> <p><u>Grants:</u></p> <p>Having ascertained the minimum number of equines required to remain in a sustainable position, the Group concentrated on raising funds to purchase another horse.</p> <p>The Group was fortunate to obtain a National Lottery Grant towards the purchase of a horse, and with other fundraising, we were able to purchase 2 horses by the end of 2021. We also received a grant from the RDA UK from the Wooden Spoon Charity.</p> <p><u>Donations</u></p> <p>We were also very fortunate to receive significant donations from several sources, and we would particularly like to thank Cereal Partners UK, the 4D Golf Club, Frome Round Table, Nationwide Building Society and several anonymous donors for their generous support.</p> <p><u>Other Fundraising</u></p> <p>A tack sale was held in June, which raised £530, and a junior volunteer also raised £550 online. Fortunately, albeit sadly, we had an insurance payout for the loss of one of our horses during Covid, which was also put towards our funds for horse purchase.</p> <p><u>Going Forward</u></p> <ul style="list-style-type: none"> • The Group will continue to offer riding and therapy to our riders, as well as non-riding horsecare proficiency and knowledge, both practical and theory. • 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. • We are working on creating a new website and logo, to increase our public awareness and help attract new volunteers participants and supporters.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Refer to previous commentary
Performance of fundraising activities against objectives set	<p>Targeted fundraising and grant applications were focussed on securing funds to purchase 2 horses to replace those lost during Covid Lockdowns.</p> <p>At the end of this reporting period, we had received a National Lottery Grant, and several substantial donations. The Group had been able to source 2 suitable horses to bring the number up to 5, which had been assessed as the minimum number of equines necessary for the Group to remain in a sustainable situation.</p>
Investment performance against objectives	Not applicable
Other	None

Financial Review

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>The Group had been able to open up fully for lessons again, and as a result, fees from participants (riding, therapy riding & horse care & proficiency) were payable again.</p> <p>In addition, the receipt of grants and several generous donations, had enabled purchase of 2 new horses to replace those lost during the Covid pandemic, along with tack etc, which has gone a long way to ensure the Group is in a sustainable position going forward.</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: £5,438.02</u></p> <p><u>Treasurers Account: £7,293.96</u></p>
Reasons for holding zero reserves	<p>Not applicable.</p> <p>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 keeping horses healthy, injury free and sound. This is essential in order to be able to conduct riding sessions. • Purchase costs of new horses is increasing all the time, and with each new purchase, the fundraising has to aim higher. • Running costs associated with keeping horses are also increasing. The small fee payable for riders will be reviewed annually 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. • 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 was a slight drop in the number of volunteers participating, however, following a recruitment drive, more interest has been generated and numbers are once again stabilising.

Additional information (optional)

You may choose to include further statements where relevant about:

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	

Structure, Governance and Management

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 self-nominated volunteers and voted onto the committee yearly by the members at the AGM.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	There is a trustee induction pack provided to all new trustees issued by RDA UK.
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

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	Ean Garner-Richardson	Group Organiser	6/05/2021 – 31/03/2022	
3	Patricia Jane Kimber	Treasurer		
4	Joanna Rutherford	Rider Coordinator		
5	Avril Richards	Volunteer Coordinator		
6	Judy Buxton	Horse Welfare Officer		
7	Donna Turnbull	Safeguarding Officer		
8	Sharon Turnbull	Media Officer	27/01/2022 – 31/03/2022	
9	Tessa Stanton			
10				

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

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

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

Signature(s)

	
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Full name(s)

Kady Chatman

Patricia Jane Kimber

Position (eg
Secretary,
Chair, etc)

Chair of Trustees

Treasurer

Date

27/03/2022

**SAXON GROUP RIDING FOR THE DISABLED ASSOCIATION
INCORPORATING CARRIAGE DRIVING**

BRADFORD-ON-AVON. CHARITY NO. 1187766

INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR

1ST APRIL 2021 TO 31st March 2022

TREASURERS ACCOUNT

INCOME: 1/04/21 - 31/03/22

			Total
	Rider Fees	Riding Fees	£11,295.00
		Competition Entries	£210.00
	Fundraising	Donations	£3,096.36
		Grants	£9,000.00
		Donations (eligible gift aid)	£4,086.01
	Insurance	NFU refunds/pay outs	£2,453.63
	Other	Incl horse refund	£8,077.00
		TOTALS INCOME	£38,218.00

EXPENDITURE: 1/04/21 - 31/03/22

	Operating Costs	NFU Insurance	£3,122.48
		RDA Affiliation/insurance	£537.50
		Cleaning Products	£57.33
		Venue Hire	£2,244.72
	Horses	Livery	£2,029.17
		Farrier	£920.00
		Feed	£280.04
		Vets fees	£3,972.41
	Horse Welfare	Saddler	£634.00
		Physio	£485.00
	Website	Hosting	£644.00
	Competitions	Entry Fees	£146.00
		Towing	£64.80
	Miscellaneous Purchases	Tack	£1,173.56
		Equipment	£203.40
		Towing Costs	£205.80
		Other (incl horse purchase)	£21,360.66
		TOTALS EXPENDITURE	£38,080.87

EXCESS/DEFICIT OF INCOME OVER EXPENDITURE **£137.13**

DEPOSIT ACCOUNT

		Total
Interest		£0.54
HMRC		£0.00
	TOTALS INCOME	£0.54

Income 1/04/2021 - 31/03/2022

Overall Final Income (Treasurers & Deposit Accounts) **£38,218.54**

Overall Final Expenditure (Treasurers & Deposit Accounts) **£38,080.87**

Opening Balances: 31/04/2021

Treasurers Account		£7,156.83
Deposit Account		£5,437.48

Balances brought forward

Treasurers Account		£137.13
Deposit Account		£0.54

Final Balances at year end 31/03/2022

Treasurers Account		£7,293.96
Deposit Account		£5,438.02

Overall Final Balances (Treasurers & Deposit Accounts) **£12,731.98**



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

Saxon Group Riding for the Disabled Association

On accounts for the year
ended

31st March 2022

Charity no
(if any)

1187766

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2022.

Responsibilities and
basis of report

As the charity trustees of the Trust, 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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

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

Signed: Vicky Ody

Date: 04/01/2022

Name: Vicky Ody

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

CIMA

Address:

8 Downs Close, Bradford on Avon, Wilts, BA15 1PR

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

Charity Commission for England and Wales		Independent Examiner Report	
<p>Report to the trustees of members of</p> <p>On accounts for the year ended</p> <p>Set out on pages</p>		<p>Section 17 Group Riding for the Disabled Association</p> <p>31 March 2022</p> <p>Charity No. 1187265</p>	
<p>As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 (the Act).</p> <p>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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.</p> <p>I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.</p>		<p>Independent examiner's statement</p>	
<p>Signed: Vicky Ody</p> <p>Name: Vicky Ody</p> <p>Relevant professional qualification(s) or body (if any): CIMA</p> <p>Address: 8 Downs Close, Bradford on Avon, Wilt, BA15 1JR</p>		<p>Date: 04/01/2022</p>	