



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **1/04/2022** **To** **31/03/2023**

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	<p>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.</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 riding and horsecare sessions on one day a week. In September, we implemented a new initiative which takes place on the second Tuesday of each month. This is "Tea with a Pony" (TWP), which is aimed at people living with Dementia, learning and/or physical disabilities or loneliness, and their support or family member.</p> <p>We currently own 6 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.• All 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:

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, including Proficiency 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: 2022-2023</u></p> <p>Following the uncertainty of the pandemic, the Group is fully open to existing and new participants, and all riding and therapy sessions have been resumed.</p> <p>The increase in interest for non-riding activities (eg stable management, grooming, proficiency and knowledge), has continued and these sessions remain 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 30 participants, and grooming, horse-care and stable management to an additional 9 participants. It is hoped that these numbers will continue to increase through 2023-2024.</p> <p>The Group also benefitted from a number of new volunteers, which has allowed us to continue the sessions with 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 are able to loan 2 additional ponies for grooming and horse-care sessions, which enables us to maintain the number of sessions for both children and adults. These sessions continue to be 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 also able</p>
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to offer sessions on a small “mechanical horse” where they can carry out exercises to help maintain their fitness.

In September, we implemented a new initiative, “Tea with a Pony” (TWP). We provide a safe and welcoming environment where people living with Dementia, learning and/or physical disabilities or loneliness and their support or family member, can come and watch a coaching session, groom a pony or just have a cuddle with a pony. Participants can do as much or as little as they feel comfortable with, and are then able to partake of refreshments provided before heading home. Sessions are run every 2nd Tuesday of the month from 11am to midday, and are proving increasingly popular.

In the summer, the Group qualified 8 riders for the RDA Nationals at Hartpury, and they attended with 4 of our horses. In addition, for some classes, we were able to lend the horses to other RDA Groups who were unable to travel their own horses. All our 4 horses were placed in every class they were entered, with riders from both our own and the other Groups. Sadly, classes were cancelled on the final day for H&S reasons due to the unusually high temperatures.

We were recommended as an active group to be part of the NHS Primary Care Network for Social Prescribing and invited to take part in a pilot for their JOY Scheme for Wiltshire. Social Prescribing enables PCNs to offer alternative treatment, in the form of volunteering or joining a group or activity as an alternative to prescribing drugs to improve mental health for individuals.

Our website was up and running by the end of the year, and has proved invaluable in raising awareness of the Group and in communications with riders and other interested parties.

Fundraising:

Grants:

Sadly, in June, we had to sell one of our horses who was no longer suitable for us, but we were fortunate to be offered a small pony almost immediately, as a replacement. We however, still required a larger horse to be able to take adult riders.

Having previously ascertained the minimum number of equines required to remain in a sustainable position, the Group concentrated on raising funds to purchase another horse, which would bring the number of equines in our Group, up to 6.

The Group was fortunate to obtain a National Lottery Community Fund Grant for £10,000.00 towards the purchase of another horse, and with a grant from Sporting Heritage and additional fundraising, we were able to purchase one by the end of 2022, bringing the total up to the desired 6.

Grants from Wiltshire Council, RDA National Office, Mid West RDA, and a Colonel William Llewellyn Grant also enabled us to purchase other greatly needed items of equipment.

Donations

We were also very fortunate to receive significant donations from a number of sources, and we would particularly like to thank the Beneficiaries of a lady who loved horses - J McLeman, E Walton, E Forryan, P Taylor, J Smith and A E White, for their generosity. We would also thank the following: Corsham Link; Warminster Bowls Club; Bradford on Avon Choral Society; Charities Aid Foundation; an anonymous donor; The Lodge of Friendship & Unity Raffle; Norton St Philip Co-op; Rotary Club of Frome; Worshipful Com Masters; K Chatman and several WI Groups for their generous donations.

We also had a number of donations from volunteers and families of some of our participants.

	<p><u>Other Fundraising</u> Other fundraising included a Tombola, a Bring and Buy sale in honour of a previous rider, a car boot sale, a Curry Night at the Agra restaurant in Warminster and a Tack Sale in October, all of which raised a total of £1,858.00.</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 will continue to maintain the website, to increase 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 primarily on securing funds to purchase 2 horses. One to replace the horse we had to sell, and another larger horse, as noted previously. This brought the total number of equines owned by the Group up to 6, which, due to our increased number of participants, was reviewed and assessed as being the number necessary for the Group to remain in a sustainable situation.</p> <p>We also required funds to replace old, worn, broken equipment; to provide a removeable ramp for wheelchair users; to carry out modifications to existing equipment for H&S reasons; to purchase seating for carers and family of our participants; and purchase new equipment boxes for each horse, which are being made to our specification, by the Bradford on Avon Men in Sheds.</p> <p>At the end of this reporting period, we had received a National Lottery Community Fund Grant, several other grants and a number of substantial donations. This enabled the Group to purchase the equines and to update, repair, purchase all equipment, tack etc that had been identified during the year.</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 remains in a financially stable position due to the fundraising efforts, grants, sponsorships, and donations of time or money.</p> <p>The Group had been open fully for lessons, and as a result, fees from participants (riding, therapy riding & horse care & proficiency) were payable regularly.</p> <p>In addition, the receipt of grants and several generous donations, had enabled purchase of a new horse, and a pony, 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 a minimum 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's aim has been 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: £5,448.34</u></p> <p><u>Treasurers Account: £20,984.42</u></p> <p>The aim, going forward, is to increase the reserve funds to the equivalent of 9-12 months running costs.</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. Likewise, costs of tack, and equipment is increasing. • Livery and running costs associated with keeping horses are also increasing. With the horses aging, greater care will be needed to keep them in good health, and additional feeds, specialist health visits etc, will be necessary to maintain them. 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 are required to assist each individual rider. The website and an ongoing recruitment drive continues to generate interest and following an influx of new volunteers, 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.• Donations from participants of "Tea with a Pony"• 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 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 annually 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 Arabian Stud & 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		
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		
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)		
Full name(s)	Kady Chatman	Patricia Jane Kimber
Position (eg Secretary, Chair, etc)	Chair of Trustees	Treasurer
Date	31/03/2023	

SAXON GROUP RIDING FOR THE DISABLED ASSOCIATION INCORPORATING CARRIAGE DRIVING BRADFORD-ON-AVON. CHARITY NO. 1187766 INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR 2022-2023				
				31.03.2023
TREASURERS ACCOUNT				
INCOME: 1/04/22 - 31/03/23			Total	
	Rider Fees	Riding Fees		£13,839.45
		Competition Entries		£1,982.00
	Fundraising	Donations		£10,137.77
		Grants		£12,401.10
		Donations (eligible gift aid)		£7,887.89
	Insurance	NFU refunds/pay outs		£1,555.11
	Other	Incl sale of horse		£3,232.28
		TOTALS INCOME		£51,035.60
EXPENDITURE: 1/04/22 - 31/03/23				
	Operating Costs	NFU Insurance		£4,093.75
		RDA Affiliation/insurance		£675.00
		Cleaning Products		£0.00
		Venue Hire		£2,381.85
	Horses	Livery		£3,130.27
		Farrier		£1,140.00
		Feed		£445.45
		Vets fees		£4,940.01
	Horse Welfare	Saddler		£1,375.00
		Physio		£355.00
	Website	Hosting		£144.00
	Competitions	Entry Fees		£1,518.50
		Towing		£457.28
	Miscellaneous Purchases	Tack		£1,912.42
		Equipment		£1,426.40
		Towing Costs		£325.30
		Other (incl 2 horse purchases)		£13,024.91
		TOTALS EXPENDITURE		£37,345.14
EXCESS/DEFICIT OF INCOME OVER EXPENDITURE				£13,690.46
DEPOSIT ACCOUNT			Total	
Interest				£10.32
HMRC				£0.00
		TOTALS INCOME		£10.32
Income 1/04/2022 - 31/03/2023				
Overall Final Income (Treasurers & Deposit Accounts)				£51,045.92
Overall Final Expenditure (Treasurers & Deposit Accounts)				£37,345.14
Opening Balances: 1/04/2022				
Treasurers Account				£7,293.96
Deposit Account				£5,438.02
Balances brought forward				
Treasurers Account				£13,690.46
Deposit Account				£10.32
Final Balances at year end 31/03/2023				
Treasurers Account				£20,984.42
Deposit Account				£5,448.34
Overall Final Balances (Treasurers & Deposit Accounts)				£26,432.76



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

SAXON GROUP RIDING FOR THE DISABLED, INCORPORATING
CARRIAGE DRIVING

On accounts for the year
ended

31/03/2023

Charity no
(if any)

1187766

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended

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 completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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.

* Please delete the words in the brackets if they do not apply.

Signed:

Victoria H. Ody

Date:

29/12/2023

Name:

VICTORIA HELEN ODY

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

CHARTERED MANAGEMENT ACCOUNTANT
(CIMA)

Address:

8 DOWNS CLOSE
BRADFORD ON AVON
WILTS

BA15 1PR

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.