



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1/04/2023 **To** 31/03/2024

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, endurance, horsecare and proficiency activities. It 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 Mondays. In September 2023, 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 can 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.• Coaching ridden sessions and leading non-ridden sessions as an Activity Leader• 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: 2023-2024</u></p> <p>The Group has been fully open to existing and new participants, and all regular riding, therapy and horsecare/proficiency sessions are continuing on the Monday of each week.</p> <p>The interest for non-riding activities (eg stable management, grooming, proficiency and knowledge), has continued and these sessions remain an important 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 33 participants, and grooming, horsecare and stable management to an additional 10 participants. It is hoped that these numbers will continue to remain steady, or increase through 2024-2025.</p> <p>One of our volunteers was nominated and recognised for her extraordinary work for our group, being chosen to be a King's Coronation Champion, one of just two awarded in Wiltshire and 500 across the whole of the UK.</p> <p>The Group also benefitted from a number of new volunteers, and we now have nearly 60 on our register. This has allowed us to continue the sessions with either 1 to 1, shared or group coaching for all ridden and therapy sessions. This has also enabled the horses and volunteers to have their sessions staggered to allow them the additional benefit of a brief rest between sessions.</p> <p>We are able to loan 2 additional ponies for grooming and horsecare sessions, which enables us to maintain the number of</p>
---	---

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 to offer sessions on a small "mechanical horse" (an "i-joy") where they can carry out exercises, whilst sitting on a saddle, to help maintain their fitness.

The new "Tea with a Pony" (TWP) initiative, provides 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 5 of our horses. In addition, for some classes, we were able to lend the horses to other RDA Groups, including those from Scotland, Northern Ireland and the Isle of Man, who were unable to travel their own horses. All our horses were placed in a class they were entered with riders from both our own and the other Groups.

One of our horses was awarded the accolade of the RDA's Equine of the Year for 2023, which is given to the best RDA horse nationally. Another of our horses won the title of Best RDA Horse at the National Championships 2023.

Following our recommendation to be part of the NHS Primary Care Network for Social Prescribing, we are now recognised locally for this. 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 has continued to be invaluable in raising awareness of the Group and in communications with riders and other interested parties.

We worked successfully with other charities in our area, particularly the Corsham and Bradford on Avon Men's Sheds, who constructed a wheelchair access ramp, modified our mounting block for safer handling, and built storage trunks for each of our horses.

Fundraising:

Grants:

Having previously acquired the number of equines identified as enabling the Group to remain in a sustainable position (ie 6), the Group concentrated on raising funds to repair, replace, or purchase much needed new equipment.

The Group received Grants from RDA National Office, The Together Fund enabling us to purchase an ipad to help our sessions run more smoothly, and several grants from Wiltshire Council, enabling us to purchase seating for our participants and their families and support workers, plus storage trunks for each horse for their tack and rugs.

Donations

We were very fortunate to receive significant donations from a number of sources, and we would particularly like to thank the following: Warminster Carnival; Box Methodist Church; Royal Arch Masons of Wiltshire; Wilts Masonic Golf Society; various WI groups, including Colerne, Collingborne, Box, Devizes, Calne, Highworth, Neston, Seend, Bridge Holt, Derry Hill, Hook and Winsley; Calne Little Foxes;

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

	<p>We also received donations from participants at Tea With a Pony (TWP) and from offering refreshments to participants and families during weekly sessions and from participants at our Coronation Tea Party.</p> <p><u>Other Fundraising</u></p> <p>We attended the open days at Middlewick House, Corsham, in the summer, and received a donation from that, but we also able to significantly raise awareness of our group, within the local community.</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. • We have been able to loan an additional pony for some children's sessions, which may not be possible going forward, and the group will review this situation in the forthcoming year.
--	---

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 much needed equipment, or to repair existing.</p> <p>We urgently needed 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 were made to our specification, by the Bradford on Avon Men in Sheds. These targets were achieved within this reporting period.</p> <p>Currently, the total number of equines owned by the Group is 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. This has resulted in increased running costs associated with livery fees, feed and tack costs, farrier, physio and veterinary visits. Due to the increase in the number of equines, we also identified the need for an additional trailer, which we were able to purchase through the donations received.</p> <p>In summary, at the end of this reporting period, we had received several grants and a number of donations. These enabled the Group to update, repair, purchase all necessary 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 new equipment etc, which ensured the Group remains 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 £10,000 in the Deposit Account, and a similar amount in the Treasurers Account, with 12 months normal running costs as a minimum.</p> <p>Balances at the end of the current reporting period are:</p> <p><u>Deposit Account: £10,037.06</u></p> <p><u>Treasurers Account: £16,160.79</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. 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"• "Adopt a Pony" packs• 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		Resigned from Trustees at AGM 02/11/2023	
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
-----------------	------	---------

--	--	--

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

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--



Other optional information

--

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	31/03/2024	

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 2023 TO 31st March 2024				
				31.03.24
<u>TREASURERS ACCOUNT</u>				
<u>INCOME: 1/04/23 - 31/03/24</u>				Total
	Rider Fees	Riding Fees		£17,579.00
		Competition Entries		£2,532.00
	Fundraising	Donations		£6,994.66
		Grants		£7,326.00
	Insurance	NFU refunds/pay outs		£3,001.14
	Other	Incl RDA NO refunds & hire of horses at National Champs		£3,670.81
		TOTALS INCOME		£41,103.61
	Transfer to Treasurers Account from closed accounts			£5,518.67
<u>EXPENDITURE: 1/04/23 - 31/03/24</u>				
	Operating Costs	NFU Insurance		£5,166.14
		RDA Affiliation/insurance		£681.00
		Cleaning Products		£0.00
		Venue Hire		£2,206.98
	Horses	Livery		£3,360.28
		Farrier		£1,490.00
		Feed		£2,133.92
		Vets fees		£6,249.33
	Horse Welfare	Saddler		£775.42
		Physio		£1,257.50
	Website	Hosting		£207.36
	Competitions	Entry Fees		£2,485.00
		Towing		£414.98
	Miscellaneous Purchases	Tack		£2,810.36
		Equipment		£3,507.40
		Towing Costs		£189.30
		Other		£8,509.63
		TOTALS EXPENDITURE		£41,444.60
	Transfer from Treasurers Account to Deposit Account			£10,001.00
EXCESS/DEFICIT OF INCOME OVER EXPENDITURE				-£340.99
<u>DEPOSIT ACCOUNT</u>				Total
Closed old Account				-£5,473.36
Opened new Account				£10,001.00
Interest				£61.08
TOTALS INCOME				£4,588.72
<u>Income & Expenditure 1/04/2023 - 31/03/2024</u>				
Overall Final Income (Treasurers Account)				£41,103.61
Overall Final Expenditure (Treasurers Account)				£41,444.60
<u>Opening Balances: 1/04/2023</u>				
Treasurers Accounts				£20,984.11
Deposit Account				£5,448.34
<u>Balances brought forward</u>				
Treasurers Account				-£340.99
Deposit Account				£4,588.72
<u>Final Balances at year end 31/03/2024</u>				
Treasurers Account				£16,160.79
Deposit Account				£10,037.06
Overall Final Balances (Treasurers & Deposit Accounts)				£26,197.85



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

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

**On accounts for the year
ended**

31/03/2024

**Charity no
(if any)**

1187766

Set out on pages

1 & 2

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:

Carver

Date:

26/01/2025

Name:

JUSTINE CARVER

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

Address:

*50 MARICLOVE WAY
YATE, BRISTOL
BS37 7FF*

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.