



AGM Report
4 October 2023

Introduction

Since the last AGM in February 2023, the charity has continued to grow. During this time, we have held a focus group meeting, started policy and procedures reviews, achieved some key milestones, had fundraising events and activities, and identified areas for development. Each of these areas will be covered in further detail within this document.

Focus Group

Since the charity was founded, it has evolved and during discussions it was acknowledged to be more effective some clarification on our purpose and structure was required. On Wednesday 26th July, a Focus Group meeting was held and over fifteen people attended. There were four key questions posed which we have now agreed on.

What should be our purpose?

After much consideration on the 6th September, it was agreed by the Committee the charities' purpose is;

Ask for Jake is a local charity run by a team of dedicated volunteers who work to raise awareness of challenges and improve the mental health of the local community. We do this by offering peer-to-peer support, signposting to services and specialist organisations, and providing training opportunities.

Who should we support?

There was a lot of discussion regarding this topic, as a charity we would like to help everyone but, we are aware of limitations in several areas. It was agreed that our primary focus should be helping adults who are supporting people who are experiencing mental health challenges.

How should we support people?

We will provide support through our men's hub, talk shops and training both delivered by ourselves and other specialist charities, not-for-profit organisations, and statutory services. Additionally, we will continue to signpost people to services and organisations that can provide further specialist support.

How should we organise ourselves?

It was identified there were several strategic activities that required attention. The Committee agreed these would be best addressed with the formation of a Board. The Board meet on a regular basis to develop, review, and agree on policies and procedures, develop strategy, and identify, and review opportunities for the charity. To ensure transparency and inclusivity the Board reports back to the Committee on a biweekly basis to provide updates on progress, get agreement on decisions or potential decisions and for suggestions and recommendations on activities.

Policies and Procedures

As a result of the Focus Group, it was agreed existing policies and procedures needed to be reviewed and amended or new documentation created to cover our remit and ensure compliance with legal and statutory obligations. The Committee have been involved in key decisions on processes and procedures and these have been feedback to the Board who amend or create documentation for sign-off. Once documentation is finalised a hardcopy is provided in the Hub. The process of review, amendment and agreement remains an ongoing activity to ensure these documents are fit for purpose.

Key Milestones, Fundraising Activities and Events

Since our last AGM there have been some key milestones within the charity, fundraising activities, and events.

Key Milestones

Whilst we have achieved lots of milestones since our last AGM, we would highlight two significant ones.

11th March - The Hub Opens

The Hub is a dedicated premises for Ask for Jake, which means the charity can run talk shops, training activities, events, and offer the facilities to other organisations. The exclusive use of the premises ensures that we can offer a confidential space for people.

10th August – Secretary Appointed

After some challenges fulfilling the role, the Committee approved the nomination of a secretary this has helped to ensure accurate minutes and record keeping.

Fundraising Activities

There are a lot of fundraising activities and donations we receive to support us financially to continue our work. We would like to thank everyone who supports us by providing any money, all contributions mean a lot. We would like to highlight a few fundraising events below.

23rd April – London Marathon

After some serious training, Kieran and Marc ran the London Marathon which raised £1,000.

6-13th May – Summit to Share

The Summit to Share team completed the Hike for Max project over the Two Moors Way which is approximately 110 miles and raised over £7,000.

27-30th May - Braunton Walkers

The Braunton Walkers trekked from Braunton to Minehead which raised over £2,000.

10th September - Sky vs. BT Openreach

The first ever Sky vs. BT Openreach football match was held at Branton FC, this was a great community and fundraising event. The final amount raised for the event is yet to be confirmed but we are hopeful this will raise nearly £2,000.

Events

The Ask for Jake team attended several events to raise awareness of the charity and its work which included 1st-4th June the Wavelength Spring Classic Festival and 29th May the Branton Village Fair.

10th June – Black Tie Event

The 2nd Black Tie event at The Barnstaple Hotel where the guests celebrated the work of the charity, we were able to thank people for their support and raise funds.

Finances

The overview of the finances for the April 2022 to March 2023 period are as follows.

Opening Balance (April 2022)	£ 32,334.00
<u>April 2022-March 2023</u>	
Income	£ 32,570.00
Expenditure	£ 19,894.00
Balance (March 2023)	<u>£ 45,010.00</u>

Please see the full accounts in Appendix A providing a breakdown for the financial year.

Plans

The current areas for plans are strategy development, training, referrals, and the increased use of the Hub. As a small volunteer charity, we are mindful of our limitations with resourcing and bandwidth. The Committee has agreed in principle there are some areas that may require the hiring of businesses and organisations to provide the expertise to enable these to be delivered.

Strategy Development

Once the trustees are agreed and sign the constitution, the next Board Meeting agenda will be to identify strategy areas and prioritisation. These strategies will be developed with input of the Committee to enable implementation. The initial topics identified are:

- Communication planning – how do we reach people, when do we do it, website update,
- Financial planning – what activities are we planning to fund in the upcoming year, what fundraising activity do we need to do, how do we track spending, and respond to changing demands.
- Networking Development – how we work with other charities, statutory, and not-for-profit organisations to signpost, deliver together, and support opportunities.

Training

The Committee has agreed now we have premises we could provide an increased range of community training. Current training will be extended to provide training which is delivered by specialist organisations and experts. We are looking at a wide variety of training opportunities to promote mental health wellbeing, raise awareness of challenges and provide tools for supporting people facing mental health challenges. Please look at for updates on our social media or posters around the village.

Referrals

There is agreement by the Committee we would like to refer people, where possible, to organisations that provide direct support. We currently offer this opportunity by referrals to The Wave Project, and Chill, and will be looking to increase our referrals to these organisations and work to identify opportunities within our purpose.

Increased Use of the Hub

The Committee has agreed increase the use of our premises for different organisations with the primary focus being on charities and not-for-profit organisations who align with our purpose. We need to work to continue to ensure the space meets all the legal and statutory obligations.

Summary

Since the last AGM, there has been a lot of activity, resources, and time spent on organising and focussing the charity which provides us with strong foundations for more effective delivery moving forward. We are pleased to have opened our premises and see this as a critical area for our future. Our special thanks for their continued support go to Dry Robe, Branton Young Farmers Club, Conservative Club, Branton Masonic Lodge, and Branton Parish Council. Additionally, we would like to thank everyone who has volunteered in any capacity to support our activities, and the local community for your continued support. We really look to be able to deliver more in the next year.

Appendix A – Full Accounts 1st April 2022 – 31st March 2023

Registered Charity Number: 1188991

Ask for Jake

**Trustees' Annual Report and Accounts
for the year ended 31st March 2023**

Page No.

1	Legal and Administrative Information
2	Trustees' Annual Report
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5	Receipts and Payments
6	Notes to the Financial Statements

Charity Name: Ask for Jake

Trading Name: Ask for Jake

Charity Commission Registered Number: 1188991

Charity's Principal Address:

2A Field Close
Braunton
EX33 1EP

Trustees:

Mrs J Squire
Mrs M Ash

Independent Examiner:

Rachael Woosey
North Devon Accounts
4 Cross Tree Centre
Caen Street
Braunton
North Devon
EX33 1AA

The trustees submit their report together with the financial statements of the charity for the year ended 31st March 2023

Structure, Governance and Management

The trustees during the period under review were:

Mrs J Squire

Mrs M Ash

Description of Charity's Governing document:

Recruitment and appointment of trustees:

Objectives and Activities

Objectives of the charity: raising awareness of challenges to mental health & to help provide training opportunities. To help improve the mental health of the local community

Main activities undertaken for the public benefit: Providing peer to peer support, specialist organisation & offering free mental health awareness training.

Financial Review

General: The full financial results are set out on pages four to five.

Reserves Policy:

Declaration and Signing

The trustees declare that they have approved the trustees' report above.

Signed of behalf of the charity trustees

Name:

Date of Approval

Independent Examiner's Report to the Trustees

for the year ended 31st March 2023

I report on the accounts for the period ended 31st March 2023 set out on pages four to six which have been prepared under the receipts and payments basis.

Respective responsibilities of the trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

examine the accounts under section 145 of the 2011 Act
to follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act and
to state whether particular matters have come to my attention

Basis of the independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and in the seeking of explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all of the evidence that would be required in an audit and, consequently, no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention which gives me reasonable cause to believe that, in any material respect, the requirements:

to keep accounting records in accordance with section 130 of the 2011 Act; and
to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Charities Act have not been met.

Independent Examiner's Report to the Trustees

for the year ended 31st March 2023

Independent examiner's statement - continued

No other matter has come to my attention in connection with my examination to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Rachael Woosey

North Devon Accounts
4 Cross Tree Centre
Caen Street
Braunton
Devon
EX33 1AA

Receipts and Payments Accounts

for the year ended 31st March 2023

	Notes	Unrestricted Funds £	2023 Total Funds £	2022 Total Funds £
Receipts				
Activities for generating funds				
Fees / grants from charitable activities		32,570	32,570	21,532
Total incoming resources		<u>32,570</u>	<u>32,570</u>	<u>21,532</u>
Payments				
Charitable activities	1	19,894	19,894	11,019
Total resources expended		<u>19,894</u>	<u>19,894</u>	<u>11,019</u>
Excess of receipts over payments		12,676	12,676	10,513
Bank accounts and cash brought forward		32,334	32,334	21,821
Bank accounts and cash carried forward	2	<u>45,010</u>	<u>45,010</u>	<u>32,334</u>

Notes to the Accounts

for the year ended 31st March 2023

1. Charitable Activities Costs

	2023	2022
	Total	Total
Training & DBS Checks	3606	2141
Subscriptions	212	173
Website Design	312	191
Equipment	4355	1877
Consultancy	0	2980
Accountancy	360	720
Sundry	772	993
Insurance	605	578
Fee's - Just Giving	234	216
Purchases	7038	1150
Rent	2400	0
	<u>19894</u>	<u>11019</u>

2. Unrestricted Funds

	Balance as at 1 April 2022 £	Incoming Resources £	Resources Expended £	Balance as at 31 March 2023 £
General Funds	32,334	32,570	19,894	45,010
Total Unrestricted Funds	<u>21,821</u>	<u>32,570</u>	<u>19,894</u>	<u>45,010</u>

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Document Version Control

Document Produced by	Anna Stone
Content Provided by	Anna Stone, Linzi McPhail, Marie Ash
Published Date	4 th October 2023