



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **22-04-2021** Period start date

To **05-04-2022** Period end date

Charity name: **The Stirling Trust**

Charity registration number: **1189164**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The time following lockdown was equally challenging. The pandemic is still affecting the development of the charity.
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.	Para 1.17 and 1.19	However, we spent most of the second half of 2022 getting insurance in place. The insurance will enable us to further develop and expand the charity. New trustees have been invited onto specific roles and will be appointed during the forthcoming AGM.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have all had regard to the guidance of the Charities Commission and whilst the charity is now able to carry out activities as originally planned; test visits have been completed and we are expecting to open for regular visitors in the near future.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	The Stirling Trust does not currently make grants
Policy on social investment including program related investment	Para 1.38	The Stirling Trust is not currently in a position to make any financial investments.
Contribution made by volunteers	Para 1.38	With the insurance policy in place, volunteering is now possible. The trustees have carried out all day to day running of the horses, yard, and charity work. Volunteers are now helping in the care and exercising of the horses.

Other		<p>The trustees have been working on introducing Horse Therapy. All of our residents must have a purpose once they are fit and well enough to serve that purpose. There are many ways a horse can live a fulfilling life without having to compete in sports or be in work.</p> <p>We found that after having placed some residents out on full loan, to riding schools, as field companions, human companions, etc we were left with a herd, all in need of care. We have seen first-hand how well horses provide therapy for people with therapy needs, who receives that therapy by providing the care and love for the horses. SEND adults have been visiting the horses on a regular basis with some great results.</p>
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Achievements and Performance

	SORP reference	
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.	Para 1.20	<p>In the second year we have had to work hard to stay active. Not being able to generate any significant funding until recently resulted in the trustees having to contribute much more.</p> <p>The second part to the charity have been running trials as planned and continue to do so for the rest of 2023. Towards the end of year the year we are hoping to be able to offer regular slots to volunteers as well as users of the service.</p> <p>The horses placed into work following successful recovery have all been doing extremely well.</p> <p>The guardians of the horses and ponies that were already placed on loan have been reporting back with positive assessments for all.</p> <p>Achieving and maintaining good health in all our residents, remain our primary objective.</p> <p>With the addition of volunteers and service users we are monitoring the effects each group have on each other.</p> <p>We are achieving great results with huge satisfaction.</p>

Additional information (optional)

You may choose to include further statements where relevant about

Achievements against objectives set	Para 1.41	The second year have been very positive and the results achieved are encouraging. More to follow in year three
Performance of fundraising activities against objectives set	Para 1.41	Fundraising has started to pick up now most business are back on track. Other foundations have been more helpful and donations are now beginning to emerge. We still have a long way to go and will keep expanding our search for regular donors and grants.
Investment performance against objectives	Para 1.41	There were no investment objectives set for the second year
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The charity did not hold any reserves at the end of year two
Amount of reserves held	Para 1.22	zero
Reasons for holding zero reserves	Para 1.22	Funding did not allow for reserves to build UP
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no uncertainties

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<p>The charity has relied on supporters fundraising.</p> <p>The current source of funding comes from our supporters.</p> <p>Applications for core funding is being sought. The planned action for end of year two/beginning of year three has been postponed to mid year three and is continuing.</p>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<p>Investment policy is part of the planned progress.</p>
A description of the principal risks facing the charity	Para 1.46	<p>The main risk to the charity is lack of funding. The permanent residents need daily care regardless.</p>
Other		<p>Currently the risks are small however, as the charity grows the number of residents the risks will need to be managed</p>

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	'Foundation' model, constitution last amended 15th February 2020
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	The Stirling Trust is a CIO, Charitable Incorporated Organisation who's only voting members are its charity trustees
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	Para 1.25	<p>Trustees must be proposed for a specific purpose and seconded, then agreed by unanimous decision by all sitting trustees before they can be appointed</p> <p>New trustees have been selected and will be appointed during year three.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<p>Before new trustees are officially appointed, the charity follows the CC guidance on becoming a trustee.</p> <p>The new trustee is required to read the leaflet guidance and acknowledge that they have done so.</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<p>The charity is run by its trustees whom all have specific roles with the charity. These roles may be changed during the AGM or EGM.</p> <p>Trustees are proposed as a result of possessing a skillset required by the charity.</p>
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	
Other name the charity uses	
Registered charity number	
Charity's principal address	

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	Lorraine Olsen	Chair	Whole year	
2	Charles Olsen	Vice chair	Whole year	
3	Rebecca Olsen		Whole year	
4	Emily Olsen		Whole year	
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Director name		
	N/A	

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

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)

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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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N/A

Declarations

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

Signed on behalf of the charity's trustees

		
Full name(s)	Charles Olsen	
Position (eg Secretary, Chair, etc)	Vice Chair	
Date	10 th May 2023	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
The Stirling Trust

No (if any)
1189164

Receipts and payments accounts

CC16a

For the period
from

Period start date
06/04/2021

To

Period end date
05/04/2022

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
	1727	-	-	1,727	2,199
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	1,727	-	-	1,727	2,199
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	1,727	-	-	1,727	2,199
A3 Payments					
	2,204	-	-	2,204	1,712
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	2,204	-	-	2,204	1,712
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	2,204	-	-	2,204	1,712
Net of receipts/(payments)	- 477	-	-	- 477	487
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	- 477	-	-	- 477	487

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds		-	-	-
		-	-	-
		-	-	-
		-	-	-
	Total cash funds	-	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK

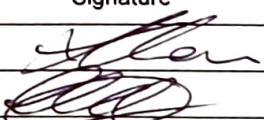
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Lorraine Olsen	10/05/2023
	Charles Olsen	10/05/2023