



Equilore Trustees Annual Report

February 2023

First reporting period of 2nd April 2021- 1st April 2022

Charity Number 1190998

CIO registered

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Charity Registration

Charity registered number: 1190998

Office Address

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Launton OX26 5ED

Equilore Yard

Park End

Croughton NN13 5LX

Bankers

Charities Aid Foundation Bank Limited

25 King's Hill Avenue

King's Hill

West Malling

Kent ME19 4JQ

Auditors

Lindsay Worville

24 Bridge Street

Brackley

Northamptonshire

NN13 7EW

Contact Information

Telephone: 07787 402236

E-mail: info@equilore.co.uk

Website: <https://equilore.co.uk/>

Trustees:

Felicity Mallam (Chair) (Appointed 24/08/2020)

Nichola Garratt (Appointed 24/08/2020)

Judith van de Kamp (Appointed 24/08/2020 - Retired 24/08/2022)

Neil Tindall (Appointed 03/05/2022)

Emma Wilberforce (Appointed 03/05/2022)

Karen Webb (Appointed 29/11/2022)

Director:

Dr. Loes Koorenhof (Founder and appointed Director 05/04/2020)

Statement from Chair

Our year in bullet points:

Founded in August 2020, Equilore celebrated its first birthday this year. As an organisation we have grown stronger financially, we have grown in the services we deliver and we have recruited a strong team to support us in our work. Our systems have been updated and we have moved to a new site which is more suitable for the services we provide.

The team involved in the day to day running of the charity has professionalised. Our trustee Board is growing with more skilled professionals to support the development of the charity. We have recruited admin staff to assist in the day to day running of Equilore and a team of committed volunteers help with the day to day care of the horses. Our client facing team has expanded to include Equine Facilitated Learning (EFL) and Psychotherapists (EFP). We provided volunteering opportunities for 3 students keen to obtain their Duke of Edinburgh Awards.

It was our goal to find a more suitable location for Equilore prior to the winter of 2022. The extremely wet winter of 2021 had us realise the site we were practising from was no longer fit for purpose. We set out to find another suitable site. We were offered locations in Launton, Middleton Stoney and Cottisford, all local to Bicester, however all these sites came with their own challenges. In May (just outside the date of this report) we found our new place in Croughton, perfectly located just on the Oxfordshire/Northamptonshire border, where we would be able to continue to support our current client base in Bicester, as well as expand our reach to people in the town of Brackley.

With funding from the Samworth Foundation and the Wates Foundation we have been able to offer subsidised sessions for those who are financially disadvantaged, as well as helping us with our core costs of keeping the horses (£5000). In total, we provided funded sessions for over 10 clients, each receiving an 8 week intervention.

During the initial phase of the pandemic we continued to provide our clients with 1:1 support and but had to cancel our group sessions. However, in the spring of 2022, as restrictions had lifted, we started our first post pandemic group sessions again. In collaboration with The Hummingbird Centre Charity Reg. 1156595) we provided group support for adults and children and ran specialist family support sessions for those affected by cancer.

This was the first year that we ran a children's service for The Hummingbird Centre. We ran peer support sessions for small groups (max. 6) children aged 8 - 12 years. During these sessions children going through similarly tricky family circumstances learned to identify and share their feelings and work together to support each other. The sessions focussed on building confidence and self esteem, through working with the horses. Overcoming challenges together and whilst also having some fun. We also provided family support sessions where the entire family unit attended to learn about managing and supporting each other within the household during a time of great distress.

We hosted one corporate event for a team of coaches who came to work with the horses for their personal development, which raised a substantial amount of money.

We have now established 7 different referral routes which include other Equine Facilitated Practitioners, charitable organisations, Social Services, GP's, Schools and a Care Home. This year, we supported 35 new clients referred through other services. At times the referrals were a two-way system. Some clients were initially referred externally but continued to make use of our services

privately after their funded sessions ended. We also saw some clients who came privately but we were able to refer back to the standard services, who then returned clients to us with funding.

Two clients undertook our high intensity emotion regulation course. Clients referred by a special needs school attended our high intensity skills based course specifically designed to support people on the Autism Spectrum. This is a skills based programme teaching emotion regulation.

Looking ahead:

With COVID placing a strain on the existing services, our client intake has been high this year. We have noted that the severity of the issues people present with has increased. It is our aim in the next year to find more funding for long term support to complement the financial support we currently offer on short term interventions.

It is our goal to participate in the international work of HETI (Horses in Education & Therapy International) as an governing body in the field of Equine Assisted Interventions.

Fundraising plans: We have been selected for the Tesco's Community Grant and are awaiting the results at time of this report. With these funds we aim to purchase a horse agility kit for clients to work with the horses. Our CEO has entered for an Ultra Marathon Fundraiser, we are setting up a JustGiving Page, registering for Gift Aid and selling personalised handmade memorabilia of the horses such as ear warmers, hand warmers, wall decorations, book markers, and calendars, as well as several continuing to support our income through grant applications.

The Board is excited to look towards 2023, as we continue to work together to support such a new charity as it works to respond to growing demand. We are committed to advocating and explaining how unique and effective equine assisted therapy is, especially with those for whom traditional therapies are not appropriate.

Introduction

The trustees present their report with the financial statements of the charity for the year ended 1st April 2022. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)

Objectives and aims:

- (1) To provide animal-assisted interventions (predominantly, but not limited to, equine) to children, young people and adults in need of support.
- (2) Promote social and educational inclusion by relieving the needs of people who experience/d lack of opportunity and assisting them to integrate with society through interaction with horses
- (3) Fill a gap in service provision for those who are finding it hard to engage with traditional room-based therapies or are on long waiting lists at oversubscribed existing services.
- (4) To support parents and professionals (including but not limited to social workers, teachers, psychologists) working with children and young people who need support.

(5) To promote the benefits of animal-assisted and nature-based therapies as an alternative therapy form within the standard healthcare setting (NHS)

(6) To advance our understanding of the power of animal-assisted and nature-based interventions through research collaborations with universities.

(7) To test and evidence the equine-assisted interventions in order to evaluate outcomes and improve service delivery.

How we met our objectives

- (1) We provided Equine Assisted Interventions to 58 new referrals. Our clients range between 7-68 years old. 37 clients referred to themselves as female, 19 as male and 2 clients identified as non-binary.

Alongside these new referrals, we also continued to support 11 clients who have been attending Equilore on a longer term basis. Clients require long term support when their mental health needs are more complex.

Funding from The Wates Foundation allowed us to provide 11 clients with subsidised 1:1 sessions over 8 weeks and 4 clients participated in our with subsidised group sessions

- (2) We established the 'Barn Pals' group for out of school children. Barn Pals focussed on building social skills and teamwork, working on emotion regulation, being able to support each other through challenges, creativity, journaling. Barn Pals was a safe space for young people who struggled to attend school due to their mental health challenges or difficult family circumstances.

Supporting the Children's services of the Hummingbird Centre in providing equine assisted peer group support to young people affected by cancer.

- (3) A big percentage of our privately referred clients find Equilore because the current waiting lists are too long. Throughout this year our waiting list has never been more than 6 weeks and we continue to work hard to provide timely support which is so essential when people decide the time is right to look for help.

- (4) 25 of our new starters this year were children under the age of 18. In working with the horses, young people typically learn and find a way to express themselves to communicate what is going on for them emotionally. In follow up reports to parents and professionals we are able to inform the adults in the child's life about how best to support the child.

- (5) This year we received more referrals from within the standard Healthcare setting. We are now delivering services to Care Homes, Schools, and Social Services. In delivering progress reports we are evidencing the outcomes of our sessions.

- (6) We have collaborated with research students from different universities. Often research projects were for a Master's or PhD dissertation, consisting of interviews with the EFP practitioner. We continue to provide data for research projects where possible. We also recruited a new Trustee to join our board who works at a university to help us network.

- (7) Currently, we measure our outcomes subjectively. Participants of funded sessions complete a feedback form. In collaboration with our new Trustee, we are now looking at a suitable objective way to measure our service outcomes.

What our feedback tells us

Clients who completed their sessions at Equilore have provided valuable feedback on how the sessions have helped them deal with the challenges they faced. Feedback from the Hummingbird Centre clients demonstrated 100% satisfaction with the sessions attended. Benefits of the sessions included:

- 'Working with' rather than 'controlling' the horse, a great metaphor for dealing with my emotions.
- The exercises with the horses have triggered some healing in me.
- One young person wrote: 'I love these sessions because of the horses and it helped my confidence, that is why I want to continue'. Whilst mum reported: 'We have definitely noticed a difference in E. whilst having these sessions. She has been calmer and sleeping better'..
- Another young person wrote; 'It made me really happy, because before I was really sad'.

Our sessions in pictures:



A horse can hear a human heart rate from 2 metres away. We can regulate our heart rate through our breathing. We encourage our clients to breathe together with the horses by feeling their belly expanding and contracting. Sometimes you get beautiful moments like this picture. Horse and human connected through breath, a calming experience for both.



Sometimes high energy is associated with negative emotions such as anger or fear. Some people feel uneasy, afraid of high energy. Instructing a horse to increase his energy is therefore often a very difficult task. Here, the client has built enough trust with the horse to create a high energy that is more like playfulness, therefore building confidence and self-esteem.



Connection through touch. The body language of the horse and client is interesting in this picture. The horse looks apprehensive and tense, reflecting the inner turmoil of this client, yet his feet stayed still (see resting hindleg) and he remained connected (see ears). A powerful experience to the client who is used to losing connection with people when his emotions become too intense.



This picture was taken by the client. As we sat and chatted about what was going on for her, the horses came close and surrounded us. The big white horse chose to lay down at our feet, a very powerful experience for this young person who struggles to trust the adult figures in her life. A lesson in how to trust and be vulnerable.



In our sessions with young people we also use arts and crafts, as pictured above. Making dream catchers out of horse shoes to help sleep a little better at home, or simply decorating a horseshoe from your favourite horse.

The function of arts and crafts in our sessions is that it helps people consolidate the lessons they learned when working with the horses. They also have a transitional object to take home with them to remind them of these lessons.

Public benefit

The general charitable purposes, aims and policies of Equilore, reserves, staff remuneration and risk management are reviewed regularly by the Trustees.

When reviewing Equilore's aims and objectives, devising the new programmes and setting the budget for the year, the Trustees confirm that they have referred to the latest information contained in the Charity Commission's general guidance on public benefit and complied with their duty under Section 4 of the Charities Acts 2006 and 2011.

The Charity's main aim, as stated in the constitution, states "To relieve the needs of people who are socially or economically disadvantaged and as a result disengaged from society."

Financial Review

Income and Expenditure

Equilore's income comes, in the main, from the fees charged for therapy sessions.

We have three main types of expenditure: Salaries, rent and care of the therapy horses.

In the period 06/04/2021 - 01/04/2022 Equilore's income was £56,516 and expenditure £43,904 (compared to £38,787 and £24,883 respectively last year). These are the only income and expenditure figures to report.

73% of Equilore's income is made up from fees for therapy services (compared to 79% last year). In 2021, Equilore received £11,000 in grants from the Samworth Foundation and the Wates Foundation and £3015 in private donations. These donations are significant in enabling subsidised sessions to be offered to vulnerable clients and cover some core costs.

As demand for our services grew, income grew. This enabled, and required, an increase in staff costs by employing admin support and two part time members of client facing practitioners. Even though the board approved funds to hire a groom, we have been able to reduce these potential staffing costs by working with dedicated and skilled volunteers.

Reserves Policy

Equilore employs a reserves policy to cover three months of operational costs (£10,976). This policy is reviewed as the charity grows to ensure the set limit remains adequate. The trustees confirm that the charity holds adequate funds to meet its reserves policy. Our *reserves* to date stand at £10,976, *restricted to operational costs* with £12,024 as *unrestricted funds*. These funds are held in order to meet future expenditure.

Structure, Governance and Management

Equilore is a CIO registered with the charity commission on 24/08/2020 date under registration number 1190998

Trustees

Equilore is overseen by a Board of five trustees. In the first year of Equilore's existence, the trustees met monthly and as the organisation has grown Board meetings are now at least once a quarter. We said goodbye to one of our trustees who came to the end of her term (Judith van de Kamp). Felicity Mallam is the Chair of the Board of trustees.

The trustees all provide their time and services for free. No trustee received remuneration or expenses in the period covered by this report.

The Board has undertaken a skills audit of the trustees with a view to recruit additional, skilled trustees. In the Autumn of 2021, Equilore advertised an open recruitment process for applications to join the Board. Key skills sought were financial, business and marketing/media. Several applications have meant the Board officially appointed two new trustees (Emma Wilberforce and Neil Tindall) in the first quarter of 2022 bringing the Board total up to 5 trustees with a quorum of 3.

Apart from the first trustees, all Board members have a minimum term of 3 years of office. This ensures a retention of knowledge whilst also ensuring the opportunity for fresh perspectives and approaches with new trustees.

Organisation/structure

Equilore is a CIO, governed by a Board of trustees, recruited from the general public. The everyday management of the charity is delegated from the Board to the Director.

The charity operates with a small team consisting of 1 part time Equine Facilitated Psychotherapist, 1 group facilitator, and an admin assistant, these are paid positions. This is standard within this field of work.

The charity is incredibly lucky to have a wealth of support from volunteers on a regular basis. 4 people volunteer on a regular basis to support the care of horses, field and stable management. The charity does not rely on any donated facilities, donated services, or other donations in kind or other intangibles.

Risk Statement

The Trustees will undertake a risk audit every two years with an assurance audit in the intervening years. Our risk assessment has been updated on the 13th of August 2022.

The Trustees have considered the major risks and uncertainties to which the charity is presently exposed and the systems and procedures to manage those risks. The Trustees identify the reliance on the Director as primary income generator as the biggest risk facing the charity in the short to middle term.

Risk: Severely reduced income when Director falls ill

Key mitigating controls already in place:

- *Expand cover with additional therapists*
- *Develop strategic development plan to set out financial objectives and road map*
- *Identify donor strategy to cover future operating costs*
- *Continue to generate a network of reliable volunteers who could take on operating the yard in case of absence of Director.*

Risk: Reputation:

- Potential and actual conflicts of interests

- Charges of discrimination, unfairness and breach of trust
- Safeguarding

Key mitigating controls already in place:

- Formal Conflict of Interests policy
- Formal policies covering complaints, confidentiality and equal opportunities
- DBS checks of all staff and regular volunteers who have direct involvement with our clients
- Safeguarding training for trustees and staff every three years

Statement of responsibility of Board of Trustees

The Trustees are responsible for preparing the Trustees' Report and financial statements in accordance with applicable law and regulations.

Charity law requires the Trustees to prepare financial statements for each financial year in accordance with United Kingdom Generally Accepted Accounting Practice (United Kingdom Accounting Standards and applicable law). Under charity law the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charity, including the incoming resources and the application of resources, including income and expenditure, of the charity for that period. In preparing these financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The Trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Felicity Mallam, Chair of Equilore Board of Trustees



Loes Koorenhof, CEO Equilore.





Receipts and payments accounts

CC16a

For the period from	02/04/2021	To	01/04/2022
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Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Private clients	30,448	-	-	30,448	24,878
Referral income	10,915	-	-	10,915	1,100
Livery	1,090	-	-	1,090	1,421
Other Income	48	-	-	48	15
Donations and Grants received	14,015	-	-	14,015	5,864
Opening bank balance	-	-	-	-	5,509
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	56,516	-	-	56,516	38,787
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	56,516	-	-	56,516	38,787
A3 Payments					
Wages and salaries	31,711	-	-	31,711	15,762
Rent and rates	6,000	-	-	6,000	4,500
Veterinary costs	518	-	-	518	90
Repairs and maintenance	243	-	-	243	322
Insurance	1,196	-	-	1,196	930
Hay and straw	420	-	-	420	640
Tack, feed and bedding costs	1,173	-	-	1,173	530
CPD	890	-	-	890	777
HR	145	-	-	145	77
Subscriptions	-	-	-	-	134
Licences	-	-	-	-	103
Refreshments	68	-	-	68	2
Bank Charges	108	-	-	108	16
Farrier	280	-	-	280	400
Equipment	912	-	-	912	314
IT	80	-	-	80	137
Equine Dentist	160	-	-	160	150
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	43,904	-	-	43,904	24,883
A4 Asset and investment purchases, (see table)					
Private expenditure	-	-	-	-	2,918
	-	-	-	-	-
Sub total	-	-	-	-	2,918
Total payments	43,904	-	-	43,904	27,801
Net of receipts/(payments)	12,612	-	-	12,612	10,986
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	10,986	-	-	10,986	-
Cash funds this year end	23,598	-	-	23,598	10,986

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	Cash at bank	23,598	-	-
		-	-	-
		-	-	-
	Total cash funds	23,598	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
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 asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Equilore

On accounts for the year
ended

1st April 2022

Charity no
(if any)

1190998

Set out on pages

3-4

(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 01/04/2022.

Responsibilities and
basis of report

As the charity's trustees, 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 all 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 in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed:

Lindsay Worville

Date:

24/01/2023

Name:

Lindsay Worville, BrackBridge Ltd

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

ACMA

Address:

24 Bridge Street

Brackley

NN13 7EW

Section B**Disclosure**

Only complete if the examiner needs to highlight material 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.