



Trustees' Annual Report for the period

Period start date		Period end date	
From	17 May 2021	To	31 March 2022

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

Bulland Court	
Ashburton	
Newton Abbot	
Postcode	TQ13 7NG

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	Roger Womack	Chair		
2	Richard Byatt			
3	Lindsay Lucas		since 26-Jan-2022	
4	Roger Hopper		until 26-Jan-2022	
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6				
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10				
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12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

Constitution

How the charity is constituted
(eg. trust, association, company)

Charitable Incorporated Organisation (Foundation model)

Trustee selection methods
(eg. appointed by, elected by)

Appointed by existing trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

For the public benefit, and within a Christian ethos, to relieve the suffering and distress caused by bereavement or loss among people in the UK and elsewhere, in particular, but not exclusively through the following:

- the provision of educational, learning, and informational resources to support individuals through the grieving process; and
- by providing other such support directed to the above objects as the trustees from time to time determine.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Main activities related to the inaugural period of Loss and Life included establishing Loss and Life as a charity, setting up a charity bank account and putting insurance in place, onboarding and recruitment of trustees, acquiring of basic office equipment, and establishing meetings and some core procedures and policies to operate the charity effectively and efficiently.

In addition, significant effort and resourcing resulted in development and production of the initial physical learning materials (development of grief cards for the bereaved and those coming alongside them) and an initial web site presence to make this resource available for purchase or free download. Packaging and distribution systems for grief cards was established.

Conversations with potential donors have yielded funds that accelerated production of the Grief cards, and research has been conducted with a range of organisations well placed to utilise and share the resources with those grieving.

In planning the activities for the year, the trustees reviewed the guidance on public benefit issued by the Charity Commission at their trustee meetings.

Additional details of objectives and activities (Optional information)

You may choose to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Volunteer contributions have been received in the areas of web site design and development (including integration of e-commerce aspects), and of production of resource packs ready to send to clients.

Additionally, many volunteers were involved in the making of a short film that reflects aspects of the founder's main bereavement journey to date, that has been made available via the website to help connect people to the purposes of the charity.

Summary of the main achievements of the charity during the year

Resources have been developed that assist people to have healthy conversations around the grieving process. Loss and Life Grief Cards, peer-reviewed with leading individuals working in the bereavement support field, cover a wide range of topics relating to grief. Four packs of Grief Cards have been produced so far offering grieving individuals a variety of entry points on the grief journey; titles to date are: 'Starting a Journey', 'On the Journey', 'Further along the road' and 'The winding road'.

Loss and Life website development has been undertaken to provide a presence on the internet to give access to the Grief Cards for both the bereaved and those coming alongside them. Integration of e-commerce and payment systems give access to those requiring physical resources. Mechanisms for order processing have been established. In addition, source materials are also made freely available through website downloads, alongside more detailed guidance around how each of the card resources might be used to support healthy conversations around grief.

Good governance has been established for the charity with respect to operations and accounting processes. Initial exploration of a CRM to better manage a variety of interactions with individuals and organisations has begun. Some initial business cards and marketing materials have been generated to allow quick dissemination of information and resources that are available.

Many conversations are ongoing to connect with individuals, charities and other organisations who may or have interest in using the Loss and Life resources and associated training going forward. Conversations are also ongoing with a range of individuals who have already made donations to support the work of Loss and Life, or who may decide to do so in the future.

Section E

Financial review

Brief statement of the charity's policy on reserves

Currently, Loss and Life has no specific reserves policy. Initial cards production and website development have been achieved. Spare funds are available for projects and activities determined by the trustees, and no borrowing is undertaken, so the charity operates within its means utilising available funds for the intended purposes for the public benefit.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

A significant donation was received from The Richard Lawes Foundation, and other individuals who have provided a range of donations large and small for all of which the trustees are grateful.

Funds used to develop and print resources for distribution are anticipated to be replenished at least in part from sale of such resources.

Further funds will be raised through production/resale of materials and further donations and grant applications where appropriate.

Section F

Other optional information

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)

R Womack *RB*

Richard Byatt

Full name(s)

Roger Womack

Richard Byatt

Position (eg Secretary, Chair, etc)

Chair

Date

9-DEC-2022



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name

Loss and Life

No (if any)

1194483

Receipts and payments accounts

CC16a

For the period
from

Period start date
17-May-2021

To

Period end date
31-Mar-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					
Donations, legacies and grants	7645.13			7645.13	
Sales of products	766.00			766.00	
Sub total (Gross income for AR)	8411.13	0	0	8411.13	0
A2 Asset and investment sales, (see table).					
Sub total	0	0	0	0	0
Total receipts	8411.13	0	0	8411.13	0
A3 Payments					
Product generation costs	4051.17			4051.17	
Web site	36.69			36.69	
Insurance	156.80			156.80	
Bank charges	81.57			81.57	
Equipment and software	273.86			273.86	
Sub total	4600.09	0	0	4600.09	0
A4 Asset and investment purchases, (see table)					
Sub total	0	0	0	0	0
Total payments	4600.09	0	0	4600.09	0
Net of receipts/(payments)	3811.04	0	0	3811.04	0
A5 Transfers between funds					
A6 Cash funds last year end	1606.60			1606.60	
Cash funds this year end	5417.64	0	0	5417.64	0

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	5417.64		
	Total cash funds	5417.64	0	0
(agree balances with receipts and payments account(s))		OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
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	
	RWomack RA	Roger Womack	9/12/22	
	RAByatt	Richard Byatt	9-Dec-2022	