

BUDLEIGH SALTERTON LIONS CLUB (CIO)

Registered Charity Number: 1198874

UNAUDITED FINANCIAL STATEMENTS **FOR THE YEAR ENDED 30 JUNE 2024**

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Trustees' Annual Report for the period						
From	Period start date			To	Period end date	
	01	July	2023		30	June

Section A Reference and administration details

Charity name	Budleigh Salterton Lions Club (CIO)		
Other names charity is known by			
Registered charity number (if any)	1198874		
Charity's principal address	29 Granary Lane, Budleigh Salterton, Devon		
Postcode	EX9 6ER		

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	Alex McDiarmid	President		
2	Rob Scott	Secretary	Resigned 30 June 2024	
3	Lawrence Booth	Treasurer		
4	Richard Allen	Immediate Past President; Marketing Chair		
5	Gavin March	Service Chair		
6	Geoff Paver		Resigned 9 July 2024	
7	Jack Keen		Resigned 9 July 2024	
8	Alan Tilbury		Resigned 9 July 2024	
9	Brian Crook		Resigned 9 July 2024	
10	Alan Lowe			
11	Sandy Moreton	Membership Chair	Appointed 8 January 24	
12	Susan Alderson		Appointed 13 August 24	
13	Gillian Wilson		Appointed 13 August 24	
14	Josette Jamieson		Appointed 1 July 24	
15				
16				
17				
18				

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
Independent Examiner	Jon Westley	Thompson Jenner LLP, 1 Colleton Crescent, Exeter EX2 4DG

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)

Budleigh Salterton Lions Club is governed by its Constitution of 9th August 2022

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

Budleigh Salterton Lions Club is a Charitable Incorporated Organisation

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

The first trustees were appointed by the Constitution and will cease to hold office at a pre-determined date. The Constitution requires a minimum of three trustees and a maximum of twelve trustees be appointed. Only members may be appointed as a trustee.

By virtue of the Club By Laws, officers elected at the AGM are appointed as trustees. In addition, members or the charity trustees may appoint additional trustees providing that this does not exceed the maximum number.

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.

The charity is part of Lions Clubs International, a global service organisation of clubs and volunteer members, who are committed to serving their communities.

The Club is managed by trustees. Trustees meet monthly. All trustees serve free of charge.

Members pay an annual membership subscription. Monies for the running of the club are held in the Administration Account. Members meet monthly, and meetings are used to plan activities and determine appeals.

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

The Objects of the Club are exclusively charitable in England and Wales:

- the advancement of citizenship
- promoting the voluntary sector for the public benefit by associating with local authorities to advance education and provide facilities in the interests of social welfare
- promoting volunteering
- the relief of poverty and those in need in particular by providing humanitarian aid and disaster relief
- the advancement of health or the saving of lives
- promoting for the benefit of the public the conservation protection and improvement of the physical and natural environment
- promoting community participation in health recreation

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)

The trustees have paid due regard to the guidance issued by the Charity Commission on the public benefit of the charity's activities.

The main activities undertaken by the charity to carry out its charitable purpose for public benefit are outlined below. These include: local fundraising events to enable the charity to deliver activities for the benefit of the public which:

- promote the health and wellbeing of members of the local community
- improve the local environment
- help individuals in need
- support local charitable and community groups and
- support charities which serve our local community.

These activities are possible through community fundraising undertaken by members, including:

- regular bingo evenings
- regular quiz nights
- golf day
- 10k run
- Gala week activities
- August Bank Holiday Fair
- Raffles.

The trustees are grateful to individual members of the public who continue to support our fundraising activities, and to local businesses who support our events through sponsorship and provision of raffle prizes.

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.

Summary of the main achievements of the charity during the year

During this year, the charity has been able to provide financial support to a number of causes and individuals, in accordance with its objects. The members have also been able to provide non financial assistance which is also included in this summary as illustrating how the charity promotes volunteering and community engagement/citizenship.

Examples of the main achievements of this year are:

Environment – members participate in regular litter picking, and recycling of batteries, blister packs, stamps, glasses

Food poverty – members assist the local foodbank through collecting food donations at Bingo nights; contributing to staffing the foodbank in Budleigh; and financial assistance has been provided to local foodbanks. Money was given for equipment for a breakfast club. Christmas food hampers were provided to local families

Diabetes – a primary aim was raising awareness of diabetes and promoting a healthy lifestyle. The charity ran diabetes testing, walks, supported park runs, and provided information stalls at community events.

Local schools and youth groups (e.g. Scouts, Youth Community Project) were supported through funds for environmental projects, education trips, books and other activities. The charity supported The Deaf Academy, which provides special education for deaf young people, with grants towards a sensory room and Soundx backpacks

Health recreation – grants were made towards the Cricket Club and Football Club

Individuals in need – small grants were made to individuals in need, for example, money to purchase a glucose monitor for a person with diabetes

Community projects – the charity provided a Christmas community lunch for nearly 120 local residents at risk of social isolation. The charity also undertook fitting key safe/providing message in a bottle to vulnerable members of the community. A grant was made towards National Coastguard Watch towards rebuilding the watch tower.

Grants were made to a number of local charities including: Seachange, Budleigh Salterton and District Hospicecare, Pete's Dragon, FORCE, Devon Air Ambulance, Charlie Duigan Foundation, Somerset Sight, and a number of national charities that benefit our wider community e.g. Diabetes UK, Brain Tumour Research, MS Society, Parkinsons UK

Internationally, grants were made through Lions Clubs International to Eye Camps and Water Well, and for flood relief in Libya, Florida and Brazil, and earthquake relief in Japan and south of Taipei.

Members also supported local causes through participating in collections by Marie Curie, RNLI, Young Lives v Cancer

Section E

Financial review

Brief statement of the charity's policy on reserves

The charities reserve policy is to maintain a minimum balance of £5,000 in the charity account and £1,000 in the administration accounts. Balances in these accounts meet the reserve policy at 30 June 2024.

Details of any funds materially in deficit

N/A

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.

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)

L. Booth

Full name(s)

Lawrence Booth

Position (eg Secretary, Chair, etc)

Treasurer

Date

24.03.2025



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Budleigh Salterton Lions Club (CIO)

On accounts for the year
ended

30 June 2024

Charity no
(if any)

1198874

Set out on pages

8-9

(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 30 / 06 / 2024.

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 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.

Signed:

Date:

24/03/2025

Name:

Mr Jon Westley

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

ACA

Address:

Thompson Jenner LLP

1 Colleton Crescent

Exeter, Devon EX2 4DG

Section B

Disclosure

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.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name : Budleigh Salterton Lions Club (CIO)

No : 1198874

Receipts and payments accounts

CC16a

For the period
from

Period start date
01/07/2023

To

Period end date
30/06/2024

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					
Membership Subscriptions	1,858	-	-	1,858	1,985
Admin Donations	322	-	-	322	271
Admin Activity/ Events	4,762	-	-	4,762	8,416
Activities for generating funds 10k run, Golf Day, etc	19,425	-	-	19,425	20,556
Fundraising activities Raffles, Bucket Collections, etc	25,598	-	-	25,598	17,653
Grants & Donations	9,275	-	-	9,275	6,898
Defibrillator Appeal		2,054	-	2,054	2,003
Reimbursement MD and District	1,100			1,100	
Bunting		1,000		1,000	
	-	-	-	-	-
Sub total (Gross income for AR)	62,340	3,054	-	65,394	57,782
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	62,340	3,054	-	65,394	57,782
A3 Payments					
LCI, MD Subscriptions	3,562	-	-	3,562	2,927
Insurances, ICO fees	253	-	-	253	35
Governance costs admin	750	-	-	750	1,601
Admin Activity Costs	3,337	-	-	3,337	4,787
Defib Purchase	-	800	-	800	-
Costs of fundraising events	9,028	-	-	9,028	8,404
Fundraising costs	11,615	-	-	11,615	8,982
Costs of charitable activities	4,051	-	-	4,051	2,991
Grants & Donations Paid	35,907	-	-	35,907	21,053
Bunting Purchase	1,299	1,000	-	2,299	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	69,802	1,800	-	71,602	50,780
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	69,802	1,800	-	71,602	50,780
Net of receipts/(payments)	(7,462)	1,254	-	(6,208)	7,002
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	30,540	2,003	-	32,543	25,541
Cash funds this year end	23,078	3,257	-	26,335	32,543

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	Lloyds Charity Account	20,076	3,257	-
	Lloyds Admin Account	3,002	-	-
		-	-	-
	Total cash funds	23,078	3,257	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
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	
	<i>L Booth</i>	Lawrence Booth	24.03.2025	