

Kerswella Care - Annual Report for 2022/23

1. The organisation:

Kerswella Care is a voluntary patient support group based at the Kingskerswell Health Centre since 2017 and responsible to it for providing a range of well-being and support services to socially isolated, vulnerable, and elderly residents. The group covers the Kingskerswell, Abbotskerswell, Ipplepen & Coffinswell communities through the Kingskerswell & Ipplepen Medical Practice in the Teignbridge area of South Devon.

Kerswella activities and projects continue to be managed through a local Co-ordinator, Gill Gould, and her assistant, Sally Collier, with both ably supported by a group of volunteers in a committee and a link trustee to KingsCare. The Co-ordinator and her Assistant work alongside existing groups to develop relationships with local communities.

In the spring 2022, it was agreed that the time was right for Kerswella Care to seek approval from the Charity Commission to become a charity incorporated organisation (CIO) and therefore an independent stand-alone body. In part, this was because we had reached a stage in our development where CIO status for us would allow that to continue at another level and would provide the opportunity to seek funding available to larger organisations. It was also the natural outcome of the work that the Lottery had helped to fund in recent years.

The submission to the Charity Commission was approved in June 2022. From that date, Kerswella Care has been managed by a board of trustees with oversight from KingsCare League of Friends gradually reducing as the trustees put their own policies and procedures in place to make sure that Kerswella continued as a going-concern. KingsCare's responsibilities will formally cease on 31st March 2023. Our partnership and collaboration with KingsCare will continue to be important and we expect to work together for the benefit of our communities residents by pooling expertise and sharing resources. We will also work closely with other local organisations.

In line with this new independence, local fundraising is important as the trustees develop plans to ensure that Kerswella not only continues to offer services to the residents of Kingskerswell, but that we seek to equalise that offer across all the communities that we serve. At the same time we are mindful of the importance of our local response to health initiatives and work closely with Kingskerswell & Ipplepen Medical Practice to help improve outcomes for patients.

2. Kerswella Care's Object:

As set out in our constitution as approved by the Charity Commission, the object of the CIO is:

The advancement of health by:

- a) co-operation with local doctors' surgeries and other health services,

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- b) the prevention and relief of sickness, disease, or human suffering,
- c) the promotion of healthy lifestyles,

in the TQ12 postcode area of South Devon.

3. Kerswella Care purpose:

The Object is best expressed through our aims. These underpin all our work:

- to improve the quality of life and well-being of those in need in our communities by providing services that:
 - empower and support people to lead healthier lives,
 - improve access to local activities that will enhance residents' well-being, social inclusion and social connections based on their needs,
 - give opportunity to establish and broaden social networks. **A significant aim is to reduce loneliness within a population that includes 30% who are over 60 with 35% of those living alone,**
 - help our communities to claim their rightful benefits to promote financial security,
 - provide a voice for those affected by poor health & well-being,
 - alleviate unmet needs within the communities and provide support to deliver change.
- to provide voluntary sector support to KIMP to patients identified with more complex needs including home support, befriending, carer support, shopping, transport to medical/social activities and prescription delivery, as well as signposting and working in partnership and collaboration with others where this is more effective.

4. How these aims are achieved:

Kerswella has access to and has set up a wide range of support services and activities all aimed at improving the quality of life of those in need within our community. To this end, Kerswella works hard at encouraging people in need to take stock of their lives and introduce them to the appropriate social connections to prevent or reduce their feelings of loneliness. We work across local agencies and volunteer groups to access expertise and help as needed - Kerswella Care is also able to access the services and work alongside the Newton Abbot Locality Wellbeing Co-ordinators who are employed in that area by KingsCare. Since the pandemic, Kerswella has looked at areas where it might focus its services with this being guided by the following statement:

- a) Fundraising to increase reserves towards covering operating costs (we expect that specific activities and projects will become self-funding through grants and awards).
- b) Source specific funding for post-Covid work particularly for mental health, well-being, and befriending.
- c) Work in partnership and collaboration across the health centre to target funding opportunities and then to

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to ensure the best outcomes for residents from grant awards.

- d) Seek additional volunteers to help maintain our support for:
 - residents' wider needs arising from Covid,
 - existing and new activities and projects,
 - our communities outside Kingskerswell.
- e) Ensure that Kerswella maintains a stake in local projects particularly run by KingsCare League of Friends and that residents are aware and benefit from the range of activities.
- f) Take stock of achievements and seek guidance from local health professionals and others on community needs and how Kerswella is best placed to help with meeting them through new activities and projects.
- g) Be mindful of wider health priorities and seek advice on the action that Kerswella can take to complement the work of local health professionals as a voluntary organisation.

5. Activities and projects in 2022/23:

In this year, all our activities and projects were fully re-opened following lifting of the pandemic restrictions. We were able to welcome new residents to the Memory Café, Lunch Club and particularly our coffee mornings. Towards the end of year we noticed a definite increase in attendance as confidence returned about everyone meeting in larger groups. Alongside our main activities we continued with many of our support services – shopping, prescription collection and helping residents with a wide range of miscellaneous tasks as they arose. Throughout, we also maintained important contact with residents via our befriending support.

We also continued to support the Memory Café in Ipplepen. In the summer we were successful in our bid to the Lottery for 'Awards for All' grant to help towards levelling up our service offer across our communities and Ipplepen in particular, including the Memory Café and other activities. As a result, in January 2023 we received grant support from Devon County Council from their 'Growing Communities' initiative and this was used to support the Ipplepen Memory Café. Another Devon grant was received from their 'Connecting You' budget towards a project intended to tackle loneliness with travel with emphasis on transport for medical and well-being appointments and trips/visits in Ipplepen. This was on-going at the year end year.

Back in In Kingskerswell, our Tuesday at the café in the playing field pavilion continues to be a very popular meeting venue for all - and a gathering point for the many regulars! Income received is ploughed back into our activities and projects. Transport to medical and well-being appointments was buoyant throughout the year. With the NHS focussing its transport services on those patients with the most significant mobility issues, it is important that our transport service continues to be available. Statistics supplied to the Devon Car Forum underline the help we have given to residents during the year. We have added to that by restarting our trips and visits. Residents were able to enjoy outings to the Smugglers' Inn and Ullacombe Farm for lunch and this was followed at Christmas

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with a visit to the Babbacombe Theatre for their panto. Again we received some funding to help with costs. Thanks to all our terrific volunteers without whom it would be very difficult to run what we do. If you would like to volunteer, please do contact either Gill or Sally. Planning has started for 2023/24 visits so please look out for publicity on these events if you are interested in taking part. Planning is also in hand for our raffle to celebrate the King's Coronation in May 2023. At the end of the year arrangements were made for the distribution of the raffle tickets.

There are two initiatives from 2021/22 that were not progressed in 2022/23. Firstly, and following its evaluation at the start of the year, it was decided not to go ahead with the acquisition of an ICT interactive sensory system which it was hoped would have particular application for the Memory Café. Instead, we shall continue to offer a wide range of activities to suit the needs of all those who attend. Members enjoyed 'Singing for the Brain' amongst many visiting groups. Secondly, KingsCare League of Friends decided not to continue with the 'Sorting Office' project involving the adaptation of the former Post Office building in the Market Square in Newton Abbot. Instead there will be a series of 'pop up' arrangements for all the various activities that were planned there including a repair café and there will be opportunities to link with other groups who are developing similar activities and these are being explored.

We are grateful to funding for:

- Lunch Club – from Western Power from their 'Community Matters' programme,
- Memory Café and befriending work – from the Co-op Local Community Fund,
- Coffee morning – from Asda towards the costs of our cream tea event to mark the restart in the summer 2022,
- Charity costs – from Devon County Council to help with set up costs in our new status.

We continue to use our Charity Log system to help us track residents' needs particularly those that we have supported and to assist those with whom we had no previous relationship. We continue to keep in touch with our wider community through social media (particularly after our activities) and regular newsletters. At the year end, work was in hand to update our website.

All these activities and projects have informed our learning as a group and helped us to consider new ways of reaching and supporting residents often drawing on the similar experiences of other local voluntary groups. This is now important as Kerswella moves forward with its development through CIO status.

6. Governance:

- a) **Trustees** - Kingsley Matthews has continued in his role as the Link Trustee link between Kerswella Care and KingsCare. The KingsCare Trustees generally meet monthly and it is the role of the Link Trustee to report on activities undertaken by Kerswella and seek approval to those where KingsCare have the responsibility. Now that Kerswella Care has its own trustee board, decisions will no longer be needed from KingsCare. There are

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at present 6 Trustees representing the local community – Kingsley Matthews (Chair), Rick Williams (Secretary), Jill Wright (Treasurer), Maggie Bonnell, Phil Shute, and Alyson Blake. Brian Hall resigned as a trustee in October 2022. The board met twice in a shadow role before charity status was approved and has met four times since in its full role. Its main activities have been concerned with governance arrangements particularly policies and procedures with reference to the Charity Commission guidance.

- b) **Committee & Friends group** – Before charity status was granted, the Kerswella Committee oversaw local operations including fundraising. The Committee met twice before the new trustees board assumed their responsibilities. It was agreed that the work of the Committee must be recognised and should continue but in a different way. It has now become the Friends group with its membership widened to include any volunteer who wishes to contribute together with other local organisations by invitation. Matters raised by the Friends are discussed at each board meeting. In this way trustees can be assured that they are in touch with local needs and ensure that Kerswella activities and projects are relevant to our communities and where new initiatives come forward they can be considered for implementation.
- c) **Annual Accounts 2022/23** – these were approved by the Kerswella trustees at their meeting on 18th July 2023 and are attached. As in previous years, they will be included in KingsCare's Annual Report and statutory returns although this is the last year that this will happen. From 1st April 2023, Kerswella Care will be responsible for producing its own report and accounts. For 2022/23 however, notes to the accounts have been added to the Charity Commission's receipts and payments summary submitted as part of the annual return.

7. Where we go next:

With Kerswella now well-established in the community, we need to meet the challenge of our growth as well as respond to the community's needs in the post-pandemic world. Although Kerswella has grown out of Kingskerswell, we are becoming established amongst Ipplepen residents. The local GP practice spans Kingskerswell & Ipplepen so it is important that Kerswella's support is similar across the 2 communities. With increasing pressures on statutory services post pandemic, Kerswella will be needed more than ever to support vulnerable and isolated people and their carers/families. It is Kerswella's business to be the go-to organisation, make a difference to these groups and help them fulfil their potential, with the key objective of supporting those in a caring role to maintain their individuality. Towards the end of the period, preparations were being made to alert the Lottery to the potential for growth and the need for funding to allow that to be met.

July 2023 – amended May 2024

The July 2023 version of this report was submitted to the Charity Commission within the Annual Report and accounts from KingsCare League of Friends – charity number 1174450 – for 2022/23

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CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
KERSWELLA CARE

No (if any)
1199459

Receipts and payments accounts

CC16a

For the period
from

Period start date
6/27/2022

To

Period end date
3/31/2023

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					
a - Grants	-	4,657	-	4,657	-
b - Donations & legacies	2,781	-	-	2,781	-
c - Charitable activities	14,632	-	-	14,632	-
d - Other trading activities	3,837	-	-	3,837	-
e - Investments	-	-	-	-	-
f - Other income	18	-	-	18	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	21,268	4,657	-	25,925	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	21,268	4,657	-	25,925	-
A3 Payments					
a - Staff-related costs	16,646	-	-	16,646	-
b - Operating costs	2,177	-	-	2,177	-
c - Charitable activities supplies	11,752	6,013	-	17,765	-
d - Other expenses	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	30,575	6,013	-	36,588	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	30,575	6,013	-	36,588	-
Net of receipts/(payments)	- 9,307	- 1,356	-	- 10,663	-
A5 Transfers between funds	7,390	7,390	-	-	-
A6 Cash funds last year end	50,917	15,358	-	66,275	-
Cash funds this year end	49,000	6,612	-	55,612	-

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	Bank balance as at 31/03/23	49,000	6,612	-
		-	-	-
		-	-	-
	Total cash funds	49,000	6,612	-
	(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	
	Mr. K. D. Matthews	Kingsley Matthews	5/12/2024	

Calculations

Section A1

a - Grants:

Devon CC - Car Forum	£677	
Devon CC - Transport Ipplepen 'Connecting You'	£1,150	
Devon CC - Locality Fund	£2,000	
Devon CC - 'Growing Communities' Fund	£830	£4,657

b - Donations & legacies

From individuals	£2,735	
From others	£46	£2,781

c - Charitable activities

Activities - main	£6,569	
Activities - transport	£3,369	
Projects	£954	
Reimbursements from residents	£3,740	£14,632

d - Other trading activities

Kingskerswell playing fields café	£2,736	
Jubilee Fun Day	£250	
Car boot sale	£65	
Abbfest	£400	
Teignbridge Lottery	£172	
Other	£214	£3,837

e - Investments

£0

f - Other income

£18

Total £25,925

Section A3

a - Staff-related costs

Employment	£16,225	
Travel expenses	£317	
CPD	£104	£16,646

b - Operating costs

Liability insurances	£228	
Vehicle insurance & servicing	£788	
Communications, ICT & support	£904	
Marketing & advertising	£0	
General equipment & resources	£257	£2,177

c - Charitable activities supplies

Transport, trips & visits costs	£1,221	
Venue hire, visiting speakers etc	£1,084	
Training & support	£4,655	
Volunteers' expenses	£1,451	
Meals & refreshments	£3,890	
Residents' support	£3,887	
Equipment supplies & materials	£1,039	
Sundry expenses	£538	£17,765

d - Other expenses

£0

Total £36,588

Restricted funds

B/F 2021/22	£15,358	
2022/23	£4,657	£20,015

Spend

From funds b/f	£1,356	
Grant spend	£4,657	
Transfer to unrestricted funds	£4,605	
	£3,000	
	-£215	£13,403

Balance to c/f to 2023/24	£6,612
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Notes to the accounts

(i) General notes:

Following the lifting of Covid restrictions, 2022/23 saw the first full year of operation for all our activities and projects - Memory Café, Lunch Club and coffee mornings - and the resumption of transport for medical and well-being appointments. In addition, a number of trips and visits took place culminating in the Christmas panto excursion to the Babbacombe Theatre. Kerswella has continued to run the park café in the Kingskerswell playing fields one day per week. Our befriending work continues to be an important element of our work. During the year, opportunities were taken to ensure that the Kerswella's services offer was in place across all the communities we serve. Together with further work to support patients with local services, this will guide our plans for 2023/24 and beyond. More information on our work throughout 2022/23 is detailed in the Annual Report.

In June 2022, Kerswella Care became a registered charity incorporated organisation. Although there was no immediate change in our financial reporting (to KingsCare League of Friends), from 01/04/23 Kerswella will be solely responsible for preparing its own accounts, Annual Report and holding a general meeting with the Friends' group about its work in 2023/24. As a first step, the new Kerswella Board of Trustees has sought local expertise to review financial procedures to ensure that these are appropriate for our new status as well as provide the assurance that the year end accounts represent a true and fair statement of Kerswella's financial position.

Grant balances for Covid-related & other projects were brought forward from 2021/22. Where necessary, approval was sought and given by the funding body for this and for any change in the grant use. This mainly affected funding for befriending work and to support a KingsCare project that was no longer going ahead. Other grants were redesignated for general use by the Trustees as the funding body was either no longer in existence or the grant received had defrayed expenses that had been met from unrestricted funds in the previous year. At the year end, restricted grants totalling £6,612 were available for use in 2023/24.

Donations continued to be strong throughout 2022/23. A much-appreciated £2,000 from the Summer Moon Trust who had decided not to continue was added to general funds in May 2022.

In 2022/23, Kerswella assumed full responsibility for meeting staff costs. It was agreed with KingsCare League of Friends that they would remain as KingsCare staff but be deployed to Kerswella Care under a service contract. During the year, staff from KingsCare supported various Kerswella activities and projects and their costs are included in charitable activities supplies.

(ii) Cash funds at the year end:

Restricted Funds - activities & projects:

At the year end, the total of unallocated restricted grants received in 2023/23 or before was £6,612. These are available to be allocated in 2023/24 as follows:

- Trips & visits	£1,092
- Befriending, well-being and other community support	£2,940
- Projects funded by Devon CC	£2,580
Total	£6,612

Unrestricted Funds - general use:

At the year end, the total for unrestricted funds stood at £49,000. These are funds controlled by the Trustees and are not subject to any restriction as to their use. Trustees are therefore able to allocated these for any purpose that they see fit in furtherance of the charity's object. In the year, it was considered prudent to designate funds to cover a minimum of 6 months operating costs and make this the subject of an annual review. Unrestricted funds are also designated for any anticipated liabilities, contingencies or matched funding. The provision set aside in 2022/23 was as follows:

- Operating costs	£12,000
- Contribution towards the cost of vehicle replacement	£2,000
- Activities & projects in communities	£7,605
Total	£21,605

After deducting this provision the balance was held as free reserves. At the year end 2022/23 this amounted to £27,395.

The Trustees' Finance and Accounts Management statement provides that, as a general rule, the accounts shall only be adjusted on an accruals basis to reflect significant items, i.e., items over £500, where any omission could distort the true & fair view. In 2022/23 there were no adjustment entries needed to be considered for inclusion in the accounts.



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
KERSWELLA CARE

On accounts for the year
ended

31/3/2023

Charity no
(if any)

1199459

Set out on pages

ANNUAL RETURN

(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 DD / MM / YYYY.

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").

Independent
examiner's statement

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.

I have completed my examination. I confirm that no material matters have
come to my attention (other than that disclosed below *) 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.

* Please delete the words in the brackets if they do not apply.

Signed:

Date:

12/5/24

Name:

IAN PENNICOTT APPS

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

CHARTERED FINANCIAL PLANNER
REGULATED BY THE FCA

Address:

3 FORE STREET

KINGSKERSWELL

NEWTON ABBOT

TQ12 5HT