

Kerswella Care - Annual Report & accounts for 2023/24

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Chair's foreword for the Annual Report & accounts for 2023/24

It is with great pleasure that I present the first full year Annual Report and accounts for Kerswella Care as an independent and stand-alone charity. Throughout the year, we continued to support our residents from our range of activities and projects and made sure that they were relevant to everyone's needs. None of this was possible without our fantastic team of volunteers willing to give up their time to help us with the Memory Cafes, Lunch Club, coffee mornings, transport for appointments and trips/visits, befriending and many other things besides during the course of the year. To them I say a big 'thank you' for all your support and for helping to enrich our residents' lives. And of course it wouldn't be possible to run so many things if it weren't for Gill and Sally our fantastic co-ordination team. In the autumn we welcomed Richard to the team to help develop activities and projects in Ipplepen along similar lines to those in Kingskerswell and work with the community there to meet their needs. And finally, I must thank the trustees for their unwavering support as we ploughed through all the governance issues, pored over policies, procedures, and budgets, and looked at risk maps and charts! This work completes the organisation that is Kerswella with everyone involved all focused on making residents' lives better in whatever way we can.

2023/24 was an important year as we looked to the future and made plans. Charities of all sizes are feeling the pressures of increasing demand whilst, at the same time, sharing concerns about funding and its availability in our current hard times because of the cost-of-living crisis and hence our ability to continue what we do. The Lottery have noticed our work and have been very supportive with small one-off grants. Both Devon County Council and Teignbridge have helped us too with small one-off grants for transport & trips, the Memory Cafes, and Lunch Club. And we have had help to provide a free meal and warm space over the winter and spring. There are many other organisations who have supported us with grants and details are included in the notes with the accounts. A special mention needs to be made of KingsCare League of Friends with whom we continue to have a close working relationship. Their experience, help and advice has been invaluable as they been there, done it and got the T-shirt to quote the phrase!

Towards the year end, we had the excellent news that the Lottery would award us a 3-year grant not only to support our ongoing work in Kingskerswell but to level it up in our other communities, notably Ipplepen as I have already outlined. So the journey ahead involves much planning work alongside those communities and adding expertise to our trustees board to ensure success.

To our communities if you are interested in supporting our work you are always assured of a warm welcome if you want to become a volunteer in whatever capacity. We always appreciate whatever time you can offer us for any activity or project.

I hope you find the Annual Report interesting and informative and if there are any questions about what we do then we will be pleased to give you more detail.

Best wishes,

Kingsley Matthews, Chair of trustees

1. About Kerswella Care

a) Introduction

Welcome to our Annual Report covering our first full year of operation as a stand-alone independent charity. We hope this gives a valuable insight into the governance of Kerswella Care and the work that it does in furtherance of its aims and objectives.

We have divided the report into sections for easy reference. By far the most significant development in the year was the compilation, submission and approval by the Lottery of our 'Kerswella in Ipplepen' project that formed the main part of the overall submission - 'Kerswella Care: planning for growth'. As the planning involved research and evidence across all our activities and projects, it is worth highlighting in the Report the many comments and observations from our residents and the data that led us to the conclusions that we made.


b) The organisation:

Kerswella Care (Kerswella) is a voluntary patient support group based at Kingskerswell Health Centre since 2017 that provides a range of well-being and support services to socially isolated, vulnerable and elderly residents. Our communities centre on 4 villages in the South Devon area bounded by Newton Abbot to the north, Torquay to the south and Totnes to the west. These are Kingskerswell, Abbotskerswell, Ipplepen & Coffinswell served by Kingskerswell & Ipplepen Medical Practice (KKIPP) in the Teignbridge area of South Devon.

In the summer 2022, Kerswella became a charity incorporated organisation (CIO) and therefore an independent stand-alone body from KingsCare League of Friends. Since then, the new Kerswella trustees have put their own policies and procedures in place to ensure that Kerswella continued as a going-concern. Our partnership and collaboration with KingsCare is however important and ongoing. We have worked together for the benefit of our communities' residents by pooling expertise and sharing resources. We have also continued to work closely with other local organisations across our communities.

In line with this new independence, local fundraising is important as the trustees developed plans to ensure that Kerswella not only continued to offer services to the residents of Kingskerswell, but that we sought to equalise that offer across all the communities that we serve. At the same time we were mindful of the importance of our local response to health initiatives and the need to work closely with KKIPP to help improve outcomes for patients.

c) Governance:

 **Trustees** - in 2023/24 there were 6 Kerswella trustees representing the local communities - Kingsley Matthews (Chair), Rick Williams (Secretary), Jill Wright (Treasurer), Maggie Bonnell, Phil Shute and Alyson Blake. The board met four times during the year with its main activities concerned with governance arrangements particularly policies and procedures with reference to the Charity Commission guidance, and

ensuring that Kerswella's finances remain sound. The Chair is the Link Trustee link between Kerswella and KingsCare.

Each trustee has an important role to play and experience to give particularly where health and well-being is concerned and this was the baseline for the development of the Lottery bid in the summer and autumn 2023. A key addition to the Board was a trustee to represent the Ipplepen community and steps were put in place towards the year end to make an appointment. This will provide a local link for the new Co-ordinator that was planned for Ipplepen in the Lottery bid.

- ✚ **The Kerswella Friends group** - before charity status, the Kerswella Committee oversaw local operations including fundraising. With charity status, it was agreed that its important work must be recognised 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 trustee board meetings. In this way, trustees can be assured that they are in touch with local needs and that Kerswella activities and projects are relevant to our communities and where new initiatives come forward they can be considered for implementation. We were pleased that the Friends discussions have included representatives from the Parish Council, Kingskerswell Parish Church and Ipplepen communities.

d) 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:

- co-operation with local doctors' surgeries and other health services
- the prevention and relief of sickness, disease or human suffering
- the promotion of healthy lifestyles

in the TQ12 postcode area of South Devon.

e) Kerswella Care's 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 social support services through:
 - access to local activities that will enhance residents' social inclusion and social connections based on their need
 - opportunities 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 to our communities to claim their rightful benefits to promote financial security
 - provision of a voice for those affected by poor health & well-being
 - alleviating unmet needs within communities and provide support to deliver change.

- to provide voluntary sector support to KKIPP patients identified with more complex needs including home support, befriending, carer support, advocacy, 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.

f) How our 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 communities. To this end, Kerswella has worked 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 have worked across local agencies and volunteer groups to access expertise and help as needed - Kerswella has also accessed the services and worked alongside the Newton Abbot Locality Well-being Co-ordinators who are employed by KingsCare. Since the pandemic, Kerswella has looked at areas where it might focus its services with this being guided by the following statement:

- ❖ Fundraising to increase reserves to help cover operating costs (we expect that specific activities and projects will become self-funding through grants and awards).
- ❖ Source specific funding for post-Covid work particularly for mental health, well-being and befriending.
- ❖ Work in partnership and collaboration across the health sector to target funding opportunities and then to ensure the best outcomes for residents from grant awards.
- ❖ Seek additional volunteers to help maintain our support for:
 - residents' wider needs arising from Covid
 - existing and new activities and projects
 - our communities beyond Kingskerswell.
- ❖ Ensure that Kerswella maintains a stake in local projects particularly run by KingsCare and that residents are aware and benefit from their range of activities and projects where possible.
- ❖ 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.
- ❖ 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.

g) Activities and projects:

Examples of our work since 2018 include:

- Memory Cafés held monthly in Kingskerswell and more recently Ipplepen where we have supported their restart from 2021

- the Lunch Club that we were asked to take on by Kingskerswell 'Sharing Care' - also held monthly
- coffee mornings held twice per month
- fetes & other community fundraisers such as fun days, and, since 2021, running a café as part of a community initiative in association with Kingskerswell Parish Council.

Our daily support working closely with care professionals taking referrals and offering services to individuals, includes:

- ✓ a range of transport services to GP, hospital and other well-being appointments
- ✓ social trips and visits - lunch, garden centres, theatre, etc
- ✓ home visits/befriending to support social interaction
- ✓ shopping and prescription collection
- ✓ advocacy, signposting to other voluntary and statutory service/benefits advice.

The wheelchair accessible vehicle (WAV) purchased in 2019 funded by the Lottery, KKIPP, Devon County Council and Teignbridge District Council is invaluable to facilitate these services.

Kerswella activities and projects are managed through our local Co-ordinator, Gill Gould, and her assistant, Sally Collier, supported by the board of trustees and our much-valued group of volunteers and Friends. We have welcomed many new residents to the Memory Cafés, Lunch Club and particularly our coffee mornings since the post-Covid restarts. We have noticed a definite increase in attendance as confidence has returned about everyone meeting in larger groups as the pandemic has subsided. Nearly 50% of our groups now comprise new members. Alongside our main activities, we continued with many of our support services and helped residents with a wide range of miscellaneous tasks as they arise. Throughout, we maintained important contact with residents via our befriending support.

Ipplepen - our plan was developed to level up our service offer across our communities and Ipplepen in particular, including the Memory Café and other activities there. An 'Awards for All' grant helped lay the groundwork. Arising from that, in January 2023, the Ipplepen Memory Café received, through Kerswella, grant support from Devon County Council's 'Growing Communities' initiative. Another Devon grant from their 'Connecting You' budget was used towards a project intended to tackle loneliness with travel with the emphasis on transport for medical/well-being appointments and trips/visits in Ipplepen. Although both grants came to an end, a phase 2 'Growing Communities' grant was awarded to help with Ipplepen Memory Café co-ordination etc costs from September 2023 to March 2024. We regarded the transport grant as seed feeding with the outcome report an important baseline for the further work outlined in the 2023 Lottery bid and this is summarised in section 3 b).

Kingskerswell - we ran the café in the playing field pavilion every Tuesday on behalf of the Parish Council. This continued 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.

Demand for transport to medical and well-being appointments has increased. With NHS Hospital Transport focussing its services only on those patients with the most complex mobility issues, our transport service is geared

up to be readily available and as flexible as possible to accommodate changes in appointment times where needed.

We ran many trips and visits in the summer 2023. Residents enjoy outings for lunches, theatre and shopping. Again, we received some funding to help with costs. All these activities are only possible with the co-ordination and support from our volunteers.

The raffle to celebrate the King's Coronation in May 2023 was successful and raised over £3,000 with important links made with local businesses who donated goods and services. The Friends group will help decide on the spending priorities from the money raised. The first purchase was an electronic winch for the WAV to make both resident and volunteer use easier and safer.

Since we started in 2017, we have helped over 500 residents in various ways - through activities, trips, transport, home visits - in addition to the wider community support throughout the Covid pandemic as set out in section 3 a). We have kept in touch with our wider community through social media (particularly after our activities), local and our regular newsletters with an important target at the year end to develop our website and keep it updated.

All these activities and projects have informed our learning as an organisation group and helped us to consider new ways of reaching and supporting residents often drawing on the similar experiences of other local voluntary groups and our own reviews. This is now important as Kerswella moves forward with its development through CIO status. An impact statement on each of our main activities and projects is included in section 3 together with case studies.

2. Our project bid to the Lottery

a) Background:

The significant increase in the local population caused by housing developments - this has continued apace with major housing developments on the outskirts of Newton Abbot and within each of Kerswella's communities. This had added to the pressure on local services and increased the need for our response as a voluntary organisation.

The 2021 report to the Lottery on the change in Kerswella's activities - emphasis would be on 1) partnership & collaborative working, 2) promoting mental health & well-being support, 3) new ways of meeting clients' needs, and 4) being responsive to health needs identified by local NHS professionals.

The effect of the pandemic on our most vulnerable patients - this was significant in terms of social isolation and, as a result, their loss of confidence. When restrictions eased, we restarted activities notably the Memory Cafes in Kingskerswell and Ipplepen. The need to do more in the communities was identified particularly in Ipplepen. Our 2022 'Awards for All' grant has improved links there. But trustees were aware that Kerswella's staff resources have not changed significantly since its inception. As a result, they were spread too thinly across our communities. Additional staff input was therefore needed to (i) make a more effective an

impact and (ii) respond to new initiatives. And so a new Co-ordinator for Ipplepen community work was therefore determined as a priority.

Equality in the availability of Kerswella's services - the local GP practice spans Kingskerswell & Ipplepen so Kerswella's support should be similar and more evenly spread across the 2 communities. With increasing pressures on statutory services post-pandemic, Kerswella was needed more than ever to support vulnerable and isolated people and their carers/families.

b) What Kerswella Care proposed to the Lottery and why:

The first strand was to make our offer equal across our communities, particularly Ipplepen, alongside our Kingskerswell work. Ipplepen priorities are like those in Kingskerswell - transport for medical/well-being appointments, trips/visits and local befriending with continued support for the Memory Cafe. We secured some short-term funding from Devon County Council to develop ideas with the community in all these areas. But to put them into action and ensure success, we knew that secure longer-term funding was needed. To do this work and build on the success of our first 6 years, Kerswella not only needed help with existing staff costs but also with the development work in Ipplepen.

We were approached to help with three new activities - two in Ipplepen and one across both Kingskerswell & Ipplepen:

- ✓ the monthly senior lunch club in Ipplepen currently run by volunteers. This may lead to us linking with their group to provide the main meal in conjunction with our chef.
- ✓ a plan to work in partnership with The Hub based at the Ipplepen Methodist Church because we share common goals - engaging with the local community, developing local services and delivering them. This is a community partnership with local village representatives offering facilities and volunteering opportunities to everyone. It is based around a community cafe and library, and various other community-led groups and activities meet during its core opening hours.

We made a joint Co-ordinator appointment at The Hub - Richard Mayoh - who handles their administration and outreach with the wider community and, for Kerswella, engagement with the community, development of local services including transport and well-being requests for the Ipplepen community.

- ✓ a project to support warm space and free meals partnering with a group organised by our Lunch Club chef and extending into our communities a service set up in North Devon to help with the cost-of-living crisis.

The Ipplepen work also includes the continuation of the support for the co-ordination of Memory Café activities through our partnership with KingsCare.

The second strand was to work closely with KKIPP to support key health targets as identified by them where there is a role for us as a voluntary group to augment local provision for better outcomes. We will partner with KingsCare and access their specialist intervention staff for improving residents' health outcomes.

c) Community involvement:

Our experience showed that residents were more likely to engage if they knew they would be part of a social group. We encouraged participation in our activities and projects to raise confidence and reduce isolation, and we provided transport to enable them to participate. As a result, we have seen many friendships made amongst residents and volunteers. Our volunteers enabled this to happen - thank you for your fantastic support.

We have worked with communities towards improving their access to services so that, once established, they could continue and thrive. We used a range of local community venues for our activities and projects that we paid for. This helps with their sustainability.

Through our community presence including staff and network of volunteers, Kerswella has access to local knowledge about where and when support to residents might be needed and appropriate. This is in addition to the referrals from statutory services. Our intervention has always been based on individual needs to alleviate isolation/loneliness and improve social inclusion as a result.

The Ipplepen community had already asked Kerswella to support some of its activities. This we were happy to do. We knew that there were additional areas that the community would like Kerswella to become involved. By the very nature of what we do, Kerswella is a people-led organisation and residents are therefore at the heart of all our activities and projects.

d) What we asked the Lottery to fund

In summary, the Lottery bid was to cover new and existing staff costs for a 3-year period. We were very pleased that the Lottery said 'yes' to our plans & ideas just before Christmas 2023! This fantastic news meant that we can continue on a secure financial footing for the next 3 years - 2024 to 2027!

3. The impact of our work

a) Befriending:

Befriending is a significant part of Kerswella's work. We have already drawn attention to the importance of our day at the café and the role that our volunteers play in helping to identify vulnerable residents. Often residents are referred to us by the NHS staff. Currently we have 8 volunteers who help with befriending and 3 support in Ipplepen. The intention is to increase these numbers via the Lottery project. Because this is a sensitive and personal activity, we have detailed guidelines for volunteers.

Examples of help to residents:

- (i) We got to know E and DB during the lockdown months. Both have severe health conditions and, having had the Kerswella Crisis Response leaflet through their door, asked us to shop for them. Their designated shopper struck up a good relationship with E and we have asked the volunteer S to continue to support her post-covid. This she has done ever since - taking E shopping once a week to regain confidence and generally offering moral support and chats where needed - especially since the loss of D in 2022. E has many needs and our volunteer S meets these perfectly and offers a pragmatic but empathetic approach. E and D started to attend our activities and we have such happy memories of D coming to our Christmas lunch in his dinner jacket and tie and dancing with the ladies! E continues to attend our activities.*
- (ii) We have known SC who is 92 since the start of our project in 2017 - she would attend the Memory Café and coffee mornings with her 2 friends. We would bring all 3 in together by car and they were fondly known as the 3 stooges! But things have changed for S since the pandemic and she finds her health and mobility have worsened as she is housebound. And one of the friends has died and the other is equally housebound. We kept in touch with S and many others during the pandemic through our 'Check in and Chat' and it was apparent she wanted to talk and talk. Her daughter is 70 and lives locally and oversees all her mum's needs but finds this role and offering friendship quite a strain. So we arranged for volunteer L to visit S weekly for a few hours of chat. This has been ongoing for 18 months and a lovely no-nonsense relationship has formed. On the same day, volunteer L then goes to see S's housebound friend G for more conversation. As for all befrienders, volunteer L always reports back to our Co-ordinator about her visits with any concerns she has and these would be escalated to the family contacts if deemed necessary.*

b) Transport:

'Tackling Loneliness with Transport in Ipplepen - Connecting You pilot 2023/23': Kerswella Care's response to Devon County Council - June 2023

Since our project was approved, our Co-ordinator has spent time in the Ipplepen community to work up support for our plans, with a recruitment campaign for new drivers and befrienders using social media, existing local contacts and making the Parish Council aware of our action.

Inevitably Kerswella has had a fairly limited time to make an impact but now that the initiative has started, and as we stated in the CY application, we are committed to its continuation and have made it an integral part of our future plans. We anticipate that these will include a more focussed approach to the wider needs in Ipplepen if through grant support we can appoint a Co-ordinator from the community there to oversee this work including transport.

We have realised that to try and do this from Kingskerswell and using our existing staff on a regular basis to undertake this work is not a practical approach going forward. The Lottery are currently considering our Ipplepen plans within a request for grant-aid covering the next 3 years. This reflects the need for services - indeed recent discussion with the new Kingskerswell & Ipplepen Medical Practice Manager has highlighted areas where Kerswella, as a voluntary group, can be part of the solution including transport. If Lottery support is however

not forthcoming or is in part only then we shall need to revisit our priorities and there will be implications for our work in Ipplepen.

We know that transport demand is increasing. This has been reinforced from the data for May 2023 where 8 transport requests could not be met from the Ipplepen area. Here are some statistics regarding the overall transport position in Ipplepen since the project started:

- We have 11 volunteers available for support and all of them are available for transport. Of these, 4 have been recruited since February 2023
- We had 51 requests for transport from February to May 2023. Unfortunately, we were unable to meet 10 of these requests (2 in February and 8 in May)
- Of the 212 total transport requests undertaken by Kerswella in the period February to May 2023, around 20% were from Ipplepen. The equivalent figure for 2022 is closer to 13%.

The position is as follows in respect of Ipplepen for the 4 months June to September 2023:

- *We had 99 requests and we were able to help 84 leaving 15 cases that we could not fulfil (7 in June, 2 in July, 4 in August and 2 in September).*
- *Of the 321 total transport requests undertaken by Kerswella June to September 2023, 25% were from Ipplepen.*

This highlights the growth in Ipplepen transport and the need to resource it.

A concern is the availability of volunteers in this area. A limited number have come forward so far. This will we think be something to build up but gradually as we increase our profile in Ipplepen. People are working longer and many that are retired do not always want to sign up to regular volunteering because they have other commitments including care for grandchildren or elderly relatives. A risk is that those we have we do not keep for the longer-term so we need an on-going recruitment drive.

In terms of trips & visits, or experience shows that we are more likely to achieve success if these are run during the summer months. We shall use our funding contribution after the CY project end to facilitate that.

We looked at both short-term and long-term benefits as follows:

- Short-term - this would raise our profile across the Ipplepen communities and improve our local focus and identify transport needs in our older vulnerable age-group that might otherwise be overlooked.
- Long term - we expected to improve their confidence by encouraging the use of our transport for social events thereby improving their well-being and reducing isolation as Ipplepen cover many small villages and hamlets that are some distance from NHS services. We know that this works in Kingskerswell. Contact with other people and sharing common experiences is often as important as the social activity itself.

Overall, the aim was to work up a transport support network as vibrant as it is in Kingskerswell. And if demand were to justify it, another wheelchair accessible vehicle or minibus for social events would be included in a longer-term plan for which Kerswella Care would take a lead in fundraising.

Our targets included: - an increase in the numbers of residents that we assist with transport for medical appointments, complementing existing arrangements and, with our support, making sure they are sustainable with increased opportunities for transport for trips and activities, increasing the number of local volunteers (ideally from 4 to 10) for transport and increasing the numbers of volunteers for befriending, working towards having facilities in Ipplepen that are available in Kingskerswell whilst taking account of and respecting the extent to which there are different needs in the communities.

Successes:

- improved engagement with the community, additional residents supported in the Ipplepen community, interest from the Lottery in what we are trying to do there as part of our longer-term plan.

Challenges:

- slower recruitment of additional volunteers with the knock-on effect on anticipated training events, mileage claims etc, limited progress on the arrangement for trips and visits that will be followed up after the CY project end.

A significant lesson learnt is that it takes time to build up community links and this is very difficult without someone to lead it instead of trying to do this within the limits of existing staff time and resources even where extra time has been committed to the CY project. This is something that has been highlighted to the Lottery as an issue and a priority to address.

Examples of help to our residents:

- A patient FB was referred to Kerswella for transport in June 2023 by Ipplepen Medical Practice because she needs regular appointments for the foreseeable future. She lives in Denbury. She normally asks a friend to take her from Denbury to Ipplepen because there is no bus service at the time of her appointment and, although taxis are available, it is a very expensive option for the relatively short journey from Denbury to Ipplepen. She normally asks a friend to take her but her friend is not able to do that at present. Kerswella was glad to help. A volunteer from Kingskerswell was available to drive rather than one from Ipplepen itself (thus underlining the need to continue recruitment from Ipplepen). She gave a donation for this journey of £5. Kerswella has helped her again several times since and this is now on-going.*
- Kerswella takes a lady PS in Abbotskerswell to Newton Abbot Hospital for regular treatments arising from a long-standing health condition. She uses the Kerswella WAV because of her disabilities. As this is a hospital visit her donation is £12. As she is in receipt of state benefits, she can reclaim this from the NHS as a reasonable expense for attending a hospital appointment. On the occasions when she has*

had to use a taxi service, she has to cover the difference between what the NHS will refund as an appropriate charge and the taxi fare. This has left her out of pocket.

(iii) A lady in Kingskerswell MD has regular appointments at the Castle Circus surgery in Torquay as that operates as a clinic of Torbay Hospital for certain treatments. She needs the use of our WAV and our wheelchair because of her mobility problems. Occasionally, she has had to use local taxis that have not been ideal - transferring into the vehicles is not easy and again costs can be high depending on whether the taxi waits or calls back after another booking. Her donation is £15. As MC is living alone, and during the summer, Kerswella took the opportunity to go the longer way round to the surgery and back via Torquay seafront. She enjoyed this.

We are pleased to offer a personal and bespoke service - often our residents will ask us to accompany them to the appointment especially where they do not have a relative to help and we are happy to support in this way as long as this is agreed with the clinician. If they are happy to attend alone, we either wait for the resident or they call us to pick them up when their appointment has finished.

The issue of cost is becoming increasingly important as this affects many of our residents who tend to have fixed incomes and are therefore vulnerable to cost-of-living increases. Kerswella's volunteer-led transport service is one way of helping to contain their expenses.

c) Lunch Club:

Kerswella Care's response to the Western Power 'Community Matters' grant award - May 2023

The Kerswella Care Lunch Club is held monthly and is part of our range of activities within Kingskerswell village to help alleviate loneliness and isolation particularly within our older and more vulnerable residents.

What impact did your project have on people experiencing loneliness and social isolation?

When the Lunch Club fully restarted in 2021/22, we knew that it would take some time for our more vulnerable residents to feel confident about attending. Through our chef and activities at the lunch - a singing group and a full Christmas event - we have increased the number of participants at the Lunch Club overall and several new residents have joined since the start of the project and as a result many have joined in with our other activities and felt sufficiently confident to participate in other local groups.

Outcomes

- ✓ 55 people reduced their social isolation of which 60-70% are new Lunch club joiners since the summer 2022
- ✓ 50% of attendees stated that their mental health has improved due to the project as they look very much forward to the date in the calendar for the next Lunch Club!
- ✓ 50% of attendees stated that their feelings of loneliness have reduced significantly.

If you were unable to achieve any or all of the expected outcomes please explain why?

We have achieved what we anticipated we would achieve by giving our residents a cost-effective hot meal and opportunities to socialise. This has encouraged new friendship groups for this and other activities.

What were the key lessons you learnt from delivering the project?

That by providing an activity where people come together to socialise, enjoy eating together and make new friends is as important as the activity itself. We have had live music and at Christmas, we had the local school choir to entertain our guests. Everyone had a Christmas gift and it was great occasion enjoyed by all 68 residents.

As we developed the Lunch Club in 2022, it was also a way of helping to alleviate the cost-of-living crisis for our vulnerable residents by providing a hot meal, desert & drinks at a very reasonable cost. Another key lesson is that residents will participate if the means of getting them there and back for an activity is as smooth as possible and undertaken by volunteers that they know and who know them. This is part of the Kerswella offer.

Please outline how this individual or family has been impacted by loneliness and social isolation

AW - this lady's husband died 4 years ago - they had a very insular life together having moved away from their home town to distance from family issues. We supported her with adjusting to life without her husband. On one particular visit, our Co-ordinator asked what she would really like and wish for and she replied quite simply 'I would love a friend'. We introduced her to our Lunch Club, coffee mornings and other activities and she is now a regular guest and has made friends with a group of other like-minded people who she also gets together with outside of Kerswella activities and has made one particular 'best friend'. She is incredibly grateful to Kerswella for giving her this new lease of life - and although we all agree she can never have back her life with her beloved husband, she is always telling us that being introduced to Kerswella and all we do has filled a gap and been a true lifeline for her.

Please outline what activities this individual or family accessed through your project

This lady attends our monthly Lunch Club, coffee mornings and café. She also has befriending visits from our volunteers.

Please explain the impact these activities had on this individual or family?

This lady now knows that she can talk to the staff/volunteers at Kerswella with any problems or difficulties that she encounters and we can either help or signpost her accordingly. Moreover, she now has a social life in attending our activities and, as a result of this, has made friendships that are carried beyond Kerswella organised activities.

How many people did your project support?

There are now 70 on our Lunch Club list! (and we are at the Hall's capacity)

Footnote:

Kerswella's charge for the Lunch Club event (meal, refreshments, draw, quizzes, entertainment - and transport to/from) is to cover our costs only and in that way we are also helping to alleviate some of the cost-of-living pressures for our residents.

d) Coffee mornings & playing field café:

In 2021, Kingskerswell 'Sharing Care' asked Kerswella whether we could take over the running of their coffee mornings. Since the pandemic, several of their volunteers felt that they could no longer help. This we were pleased to do. Each of our twice monthly coffee mornings sees regular attendances of between 40 and 50 residents. Kerswella provides the venue and transport (by our volunteer drivers), and volunteers provide home-made cakes and savouries. There is always a draw, quizzes and sometimes live music. Many new friendships have been made. Again, charges are intended to cover costs.

At a similar time, Kingskerswell Parish Council asked whether Kerswella would like to help run the community café set up in the village playing fields. We were very pleased to be able to say 'yes' and now run this once a week. Our café day is always a happy and lively occasion with many people congregating, making friendships and returning each week. We have gained an insight into the world of those who come that we might not so easily get in any other way - a window into the lives of the older residents of the village. This has helped us with the assessment of needs for new clients. We have also met new volunteers here and so it is an important day in many respects.

An example of help to a resident - whose needs might have otherwise gone un-noticed:

CD has been known to Kerswella since 2017 - a chirpy lady living alone without living relatives since her parents passed. She regularly attends our activities and is very much part of the Kerswella community albeit quite private but independent - still driving at 84. In May this year, C suddenly collapsed in the village PO and was admitted to hospital. She had a traumatic time during her 5-day stay having never having made it to a ward. Our Co-ordinator had a call from the hospital ward as C could only think of Kerswella as the point of contact. She was discharged with no comprehensive care package. We visited her the day after she arrived home. She was very confused about what had happened to her and where she had been but was very clear about having been told not to drive. This caused her much anxiety. She was also confused about her medication. This was not the C we had come to know. So we sorted this out with KKIPP and arranged for her nominated pharmacy to be changed the village pharmacy and requested a medication review and automatic pill dispenser. We alerted the GPs of our concerns about her sudden mental health decline. As a result, they requested an adult mental health assessment. We discovered from C that she had a private arrangement for a home help for some months who had done shopping and undertaken some personal care as well as general support around the house. C put us in contact with her. It transpired that this lady was equally concerned about C but did not know where to turn for help. She was happy to continue and up her support for C but lacked the knowledge of the social care system but felt that C should be getting more support from the statutory services. We were asked by C's home help friend to attend C's mental health assessment at home. This was moral support for both. C now has a diagnosis of sudden onset Alzheimer's with provision now in place including a court protection order for her finances. We have helped with Attendance Allowance forms and in conjunction with C's home help and

we are now in contact with C's social care assessor. C is now within in the care system with the full package of support that care she needs to help her with personal care/eating/medications. And Kerswella volunteers continue to support her socially alongside her home help in getting about for shopping, hair and medical appointments. C continues to attend our activities and has recently joined our Memory café with other ladies she knows locally - and even came on a trip to the theatre with us in August 2023.

e) Memory Cafés:

After lockdown was finally lifted, we were able to restart the Memory Café in Kingskerswell. With the Ipplepen community, Kerswella Care helped with the restart of the Memory Café there. In Ipplepen a temporary base had to be used pending the refurbishment of their usual premises - not the best start. Devon CC and the Lottery were instrumental then in providing funds to enable both Memory Cafes to build up and then progress. Grant funding continued in 2022/23 and has been recently awarded until the spring 2024.

We know that many of our vulnerable residents had lost confidence during Covid particularly those with memory problems. Inevitably, restart numbers were low but have increased in both villages and are now in the range 15 to 25. This is a good group size. The monthly sessions last for about an hour and a half. The specialist memory support from our partner organisation, KingsCare has been available throughout to lead groups and this has been appreciated particularly by the Ipplepen Memory Café group who have struggled with this aspect.

Our project is to continue to develop the Memory Cafes in Kingskerswell & Ipplepen and provide stimulating sessions involving specialist memory support, local speakers/visitors, games & quizzes and refreshments to the most vulnerable elderly residents in our communities. Where appropriate we complement these with activities to promote physical well-being - singing, skittles & seated exercises. This is an important element of Kerswella's work focussing as it does on alleviating loneliness and social exclusion of our elderly residents across all our communities. Memory Café success is measured by our residents leading more fulfilled and where possible more independent lives and regain their social confidence. Where family members are involved with our work this too is important in improving outcomes.

As with other activities a small charge is levied to cover our basic costs - hall hire, refreshments and resources. And again transport is provided by our volunteer drivers including use of our WAV where necessary.

An example of help to a resident:

RB and DB having been coming to the Kingskerswell Memory Café since its start in 2018. R has vascular dementia following a severe stroke and D is his carer. They have been married 70 years and are both 90 - R's condition is deteriorating and his mobility is also a challenge but we are able to bring him into the café using our WAV so this makes the trip less stressful for him physically.

D says that the monthly Memory Café is a highlight for them - they have very little social life and D delights in seeing R smile and giggle at some of the activities we have - he adores the cake too! In D's words last month, after a few months residential care stay for R - 'Look at his face, I haven't seen him smile and chuckle like that for months'. She was quite teary seeing her beloved R with a glint again in his eye. 'I am so very grateful - you are all so kind and caring - such lovely people - it such a safe and intimate environment - just right for R'.

4. Policy & procedure development

Since becoming an independent registered charity, Kerswella trustees have spent considerable time amending existing policies and procedures, drawing up new ones and seeking advice on best practice and ways of ensuring good governance standards as required by the Charity Commission. They have given particular emphasis to:

a) Safeguarding vulnerable adults:

We know that vulnerability manifests itself in various ways - food poverty and not eating well, lack of warm space, health and safety concerns etc. Kerswella is concerned with building up the resilience of both Individuals and the community through a range of activities and projects working in collaboration with others in a multi-disciplinary approach - for example, the local Fire Brigade community team for home safety visits and PCSO for security advice. Our staff have recently undergone safeguarding training within a programme set up by KingsCare.

b) Our approach to inclusivity:

We have an 'access to services' policy that is focussed on equality and reflects the ideals that underpin the NHS with our services provided to meet health needs without discrimination including the ability of individuals to pay for them. This is particularly important now during the current cost-of-living crisis. This is embedded into the very fabric of what Kerswella does - **social isolation and loneliness can apply to anyone** - with our response always tailored to the individual need.

c) Policies & procedures in place as at 31/03/24:

Volunteer's resource pack

- Why volunteer
- Volunteers support
- How to be a successful volunteer
- Volunteers driving guidelines
- Data confidentiality - policy & agreement
- Guidance notes to volunteers for befriending
- Protection of vulnerable adults.

Other policies & procedures

- Acceptance of gifts & legacies
- Access to services - equalities statement
- Accident/incident flowchart
- Anti-harassment & bullying
- Complaints
- Conflicts of interest
- Data Privacy Notice
- Environment & sustainability statement
- Guidance for preventing bullying & harassment
- Health & Safety
- Lone Working
- Risk Management & risk register



Registered Charity 1199459

For help when it's needed across our communities

- Records retention & data security guidance
- Use of social media

together with various risk assessments for our main activities and projects. At the year end the trustees had drawn up a draft procedure for whistleblowing. The trustees work to annual timetable to review existing policies/procedures and are alert to new requirements as they arise.

5. Financial matters

Trustees reviewed their financial arrangements and drew up a guide for the charity's financial management. The bank account is reconciled monthly and information is shared on the financial position with a monthly statement alongside the budget fixed at the start of the year so that trustees can track financial performance.

Appendix A includes the accounts for 2023/24 that have been checked by an independent examiner as required by the Charity Commission. There are no significant matters that the examiner considers needed to be brought to the attention of trustees.

Appendix A - accounts for 2023/24

Kerswella Care Income & Expenditure - year ending 31/03/24

1 Income:	
a - Grants	£15,356.72
b - Activities - main	£9,294.75
c - Activities - transport donations	£6,439.36
d - Activities - other	£3,744.15
e - Projects	£4,805.13
f - Donations	£3,357.62
g - Investments	£0.00
h - Other	£0.00
Total	£42,997.73
2 Expenditure:	
a - Staff related costs	£20,447.71
b - Capital costs	£0.00
c - Operating Costs	£2,341.32
	£22,789.03
3 - Activities & projects supplies:	
a - Transport	£3,288.35
b - Venue hire/visiting speakers	£1,321.00
c - Entry fees & tickets	£350.00
d - Training & support	£10,934.08
e - Volunteers' expenses	£2,525.37
f - Meals & refreshments etc	£5,269.05
g - Residents' support	£895.24
h - Equipment & materials	£1,238.23
i - Sundry items	£1,478.82
Total	£50,089.17
Surplus of expenditure	£7,091.44
Bank balance as at 31/03/23	£55,611.56
Bank balance as at 31/03/24	£48,520.12
Reserves to be allocated for:	
	£7,205.00
	£41,315.12
Total	£48,520.12

Kerswella Care Activities - year ending 31/03/24

1 Memory Café:	
a - Income	£739.28
b - Expenditure	£698.66
Net	£40.62
2 Lunch Club:	
a - Income	£4,769.33
b - Expenditure	£5,106.43
Net	£337.10
3 Coffee mornings:	
a - Income	£4,086.14
b - Expenditure	£1,182.29
Net	£2,903.85
4 Transport:	
a - Income	£8,439.36
b - Expenditure	£3,556.44
Net	£4,882.92
5 Other Activities & projects:	
a - Income	£25,063.62
b - Expenditure	£16,856.32
Net	£8,207.30
6 Staff:	
a - Income	£0.00
b - Expenditure	£20,447.71
Net	£20,447.71
7 Operating costs:	
a - Income	£0.00
b - Expenditure	£2,341.32
Net	£2,341.32
Surplus of expenditure	£7,091.44

- Representing reserves b/f from 2022/23
 - Representing reserves to c/f to 2024/25
 - Activities/projects (Restricted Funds)
 - General use (Unrestricted Funds)

These accounts are prepared on a cash basis and reconciled to the bank account as at 31/03/24.

General notes:

2023/24 saw a further full and busy year for all our activities and projects - Memory Café, Lunch Club and coffee mornings - transport for medical and well-being appointments and for a number of trips and visits during the summer and autumn with the Babbacombe Theatre pantomime at Christmas as usual! With the full support from the Parish Council, Kerswella has continued to run the playing fields café in Kingskerswell on Tuesdays. Our befriending also continues to be an important element of our work. Following the 'Awards for All' grant in 2022/23, a full Lottery bid to develop Kerswella's services across all the communities we serve and particularly Ipplepen was submitted in the autumn 2023 for a 3 year programme from 01/04/24 to 31/03/27. Pending the Lottery's decision, Kerswella received grant support to take the project's initial steps in Ipplepen through the appointment of an additional Co-ordinator to oversee the work and be based there. Kerswella worked with the Hub community centre to make a joint appointment and this is ongoing. Just before Christmas 2023 the Lottery gave us the excellent news of their approval of the project and the associated funding. More information on our 2023/24 work is detailed in the Annual Report.

- (ii) From 01/04/23, Kerswella is responsible for preparing its own accounts, Annual Report and submitting these to the Charity Commission. The Trustees have decided to hold a Friends' meeting in the autumn 2024 so that the first full year information can be shared with them and any comments invited prior to submission.
- (iii) Grant balances for Covid-related & other projects were brought forward from 2022/23 (£6,612). Where necessary, approval was sought and given by the funding body for this and for any change in the grant use. New grants received in 2023/24 are in income/expenditure line 1a) and activities line 5a) and also referred to in the notes below. At the year end £7,205 in respect of grants received in 2023/24 and before will be available for use in 2024/25. The grants total excludes the amount allocated by Kerswella on behalf of the Devon Car Forum to other voluntary groups (£39,300).
- (iv) Donations continued to be strong throughout 2023/24. Activities line 4a) includes transport donations & activities line 5a) includes those from local supporters, organisations and other general donations. There were several individual donations of £300 or more, 2 collections at concerts totalling £650 and a legacy of £300.
- (v) The arrangements for staff continued in 2023/24 whereby they are employed by KingsCare League of Friends but deployed to Kerswella under a service contract. With the new Ipplepen Co-ordinator, the staff complement is now 3 (1.5fte) at the year end. During the year, staff from KingsCare supported various Kerswella activities and projects - notably the Memory Cafes in Kingskerswell and Ipplepen - and their costs are included in income/expenditure line 3d). Costs for Kerswella staff are in line 2a).

Income & expenditure notes:

- 1a Grants were received from:
 - Devon County Council - £9,796 total - Devon Car Forum - £4,636, Locality Fund for Lunch Club - £430, Locality Fund for the Lottery project - £1,000, 'Growing Communities' - Memory Cafes - £1,130 and the Lottery project - £2,600. A Small Lottery grant of £2,000 was received from Teignbridge District Council for the Lottery project - £1,500 and for a warm space/hot meal initiative - £500.
 - Other grants - Co-op Local Community Fund - £3,361 including £650 for use in 2024/25 and Devon Memory Cafes - £400 - with £200 forwarded to Ipplepen Memory Cafes as their share.
 - 1b This comprises Memory Café - £439, Lunch Club - £4,769 and Coffee mornings - £4,086.
 - 1c This income excludes the Devon Car Forum grant - £2,000 which is part of the grants total.
 - 1d Main income headings - Park café - £2,853, Coronation Fun Day - £242 and Teignbridge Lottery - £586.
 - 1e This comprises Covid restarts/befriending - £733, trips/visits - £634, and coronation raffle - £3,438.
 - 1f This includes donation from individuals - £2,176 and from groups/organisations - £1,181.
 - 2a These costs were recharged by KingsCare League of Friends.
 - 2b Although none is shown here, Trustees agreed to include a lump sum provision in the accounts from unrestricted funds for the eventual replacement of the WAV - £2,000.
 - 2c This comprises liability insurance share - £506, ICT services & support - £1,045, publicity and marketing - £57 & general equipment & resources - £733.
 - 3a This includes all WAV running costs. Volunteers' expenses for use of their own vehicles are included in line 3e.
 - 3d These cost are also recharged by KingsCare League of Friends for projects support - £10,934.
 - 3g This includes £636 related to shopping costs for our residents. The remainder is for presents, birthday cards etc.
- All information in other lines is self-explanatory.

Activities notes:

- 1 The main costs for the Memory Café have been met from grants received during the year.
- 2 The small deficit is a charge on general funds. Some equipment and Christmas costs were funded separately from the Co-op Local Community Fund and Devon CC.
- 3 The surplus from this activity helps towards overall running costs funded from general funds.
- 4 This includes the £2,000 grant from Devon Car Forum including £1,200 for overseeing the fund for Devon for other voluntary groups.
- 5a This comprises all 'other activities' income - £3,744, donations - £3,357, grants for activities & projects - £10,521, projects income - £4,805 including £3,438 received for the coronation raffle and £2,636 for the Devon Car Forum to be held as a reserve.
- 5b This comprises all 'other activities' costs - £886 (mainly volunteer's expenses), residents' support - £1,418, training & support - £10,934, trips/visits - £853 and equipment, transport and sundry costs - £2,765.
- 6 Costs are as line 2a of the income/expenditure section.
- 7 Costs are as line 2c of the income/expenditure section.



Kerswella Care

Registered Charity 1199459

For help when it's needed across our communities

Balance sheet notes:

5a Restricted Funds - activities & projects:

At the year end, the total of unallocated restricted grants received in 2023/23 or before was £7,205. These are available to be allocated in 2024/25 as follows:

- Support for the Lottery project from 01/04/24	£3,565.00
- Befriending, well-being and other community support	£1,004.00
- Projects funded by Devon CC - Car Forum reserve	£2,636.00
Total	£7,205.00

5b Unrestricted Funds - general use:

At the year end the total for unrestricted funds stood at £41,315. These are funds controlled by the Trustees that 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 (£12,000) and make this the subject of an annual review. At their meeting on 18/04/23, Trustees reaffirmed this and confirmed that this should remain the same for 2023/24 as some liabilities will be covered within activities and projects.

Unrestricted funds are also designated for any anticipated liabilities, contingencies or matched funding. The provision included in the accounts is as follows:

- Operating costs	£12,000.00
- Contribution towards the cost of the WAV replacement	£4,000.00
- Activities & projects - including the coronation raffle net proceeds	£8,904.00
Total	£24,904.00

After deducting this provision, the balance is held as free reserves. At the year end 2023/24 this is £16,411.

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 and fair view. In 2023/24 there no adjustment entries needed of this nature to be considered for inclusion in the accounts.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
KERSWELLA CARE

No (if any)
1199459

CC16a

Receipts and payments accounts

For the period
from

Period start date
01/04/2023

To

Period end date
31/03/2024

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					
a - Grants	-	15,357	-	15,357	-
b - Donations & legacies	3,357	-	-	3,357	-
c - Charitable activities	20,540	-	-	20,540	-
d - Other trading activities	3,744	-	-	3,744	-
e - Investments	-	-	-	-	-
f - Other income	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	27,641	15,357	-	42,998	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	27,641	15,357	-	42,998	-
A3 Payments					
a - Staff-related costs	20,270	-	-	20,270	-
b - Operating costs	4,197	-	-	4,197	-
c - Charitable activities supplies	10,859	14,764	-	25,623	-
d - Other expenses	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	35,326	14,764	-	50,090	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	35,326	14,764	-	50,090	-
Net of receipts/(payments)	- 7,685	593	-	- 7,092	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	49,000	6,612	-	55,612	-
Cash funds this year end	41,315	7,205	-	48,520	-

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 31/03/24	41,315	7,205	-
		-	-	-
		-	-	-
	Total cash funds	41,315	7,205	-
	(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	



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Kerswella Care

**On accounts for the year
ended**

31/3/2024

**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 31/03/2024.

**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 (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:

30/7/24

Name:

Ian Pennicott FPFS

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

CHARTERED FINANCIAL PLANNER
REGULATED BY THE FCA

Address:

3 FORE STREET

KINGSKERSWELL

NEWTON ABBOT TQ12 5HT