

Kerswella Care - Annual Report & accounts for 2024/25

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Chair's foreword for the Annual Report for 2024/25

It is again with great pleasure that I present the second 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 with an increasing range of activities and projects and hopefully made sure that they were relevant to everyone's needs. Again we would struggle to provide any of these without the willingness and devotion of our fantastic team of volunteers who freely 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. I need to express my continuing gratitude on behalf of the trustees for all your support and for helping to enrich our residents' lives. It is really appreciated by everyone. I must mention our brilliant co-ordination team, Gill and Sally, and now Richard whose prime role is in Ipplepen, for all their hard work in running all the things that we do. Finally, thanks to our trustees for their steadfast support and work to ensure that we looked at all the governance issues that came our way including taking on board new requirements to ensure that Kerswella remains a going concern! Again I must stress the team approach with everyone involved in Kerswella all focused on making residents' lives better in whatever way possible.

2024/25 was the first year for the implementation of our Lottery project and so this report includes a lot of the detail submitted in the year-end report on our progress as it summarises all the things that have happened. And of course helps point the ways forward for the next 2 years.

We have been successful in our bids for smaller one-off grants for particular projects. Again, both Devon County Council and Teignbridge have helped us with the costs of transport, trips & visits, with grants too available to us for the Memory Cafes and Lunch Club. The finance section and notes to the accounts includes details of the many other organisations who have supported us with funding. We have been fortunate to have many donations from within our communities and these are very much appreciated as they add to the funding for our work. Again I must make special mention of KingsCare League of Friends with whom we continue to have a close working relationship. Their experience, help and advice has continued to be invaluable.

We have secured support from a number of new volunteers in 2024/25 despite the pressures on people's time. So the message is again to our communities that 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

Welcome to our Annual report covering our second 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 with the first an overview of Kerswella and its operations. By far the most significant development in the year was the work we have been able to do with the Lottery funding for our 'Kerswella in Ipplepen' project. This is described in some detail in section 2.

a) 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 was important as the trustees developed plans to ensure that Kerswella not only continues 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.

b) Governance:

✚ **Trustees** - in 2024/25 there were 7 Kerswella trustees representing the local communities - Kingsley Matthews (Chair), Rick Williams (Secretary), Jill Wright (Treasurer), Maggie Bonnell, Phil Shute, Alyson Blake and Steve Rattlidge who was appointed to represent the Ipplepen community in April 2024. He provides an important link for our new Co-ordinator, Richard Mayoh, who was appointed to oversee our Ipplepen work. Each trustee has an important role to play and experience to give particularly where health and well-being is concerned.

Trustees met as a board four times during the year with its main activities concerned with the whole range of governance matters but 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.

- ✚ **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.

c) Kerswella Care's Object:

As set out in our constitution as approved by the Charity Commission, the Object of the Kerswella 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.

d) 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.

e) 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.

f) **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 with KingsCare's help
- 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 involving close working 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 - the plan in the Lottery funding bid was developed to level up our service offer across our communities and Ipplepen in particular, including the Memory Café and other activities there. Richard Mayoh was appointed in the autumn 2023 to take this forward.

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 the 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 again ran many trips and visits in 2024/25 not only in the summer months but across the whole year in response to demand! 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.

All 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.

g) Policy & procedure development

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

❖ 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. Our staff have recently undergone safeguarding training within a programme set up by KingsCare.

❖ 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 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.

❖ Policies & procedures in place as at 31/03/25:

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

together with various risk assessments for our main activities and projects. At the year end trustees had plans to draw up a timetable to review policies/procedures.

h) Financial matters

Trustees reviewed their financial arrangements and looked again at their guidance for the charity's financial management in the light of updated advice from the Charity Commission.

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.

During the year grant support was received as follows:

- ✚ July 2024 - Devon Car Forum - £1,742 towards the running costs for our patient transport service and administering the grant for Devon voluntary groups
- ✚ October 2024 - Devon Memory Cafes - for a project (£380) and support for Kingskerswell (£200) and Ipplepen (£200) Memory Cafes
- ✚ October 2024 - Devon Locality Fund - £500 towards trips, visits and local activities
- ✚ November 2024 - 2nd instalment of the Co-op Local Community Fund 2023 - £915 - for the Memory Cafes
- ✚ November 2024 - Teignbridge District Council small lottery grant - £2,500 towards trips, visits and local activities in 2024/25 but mainly for use across 2025

- ✚ March 2025 - 1st instalment of the Co-op Local Community Fund grant allocation 2024 - £500 towards trips, visits and local activities in 2025/26.
This augments the Lottery's grant funding that covers mainly staff costs.

In the autumn 2024, the Chancellor announced increases in both employers' national insurance contributions and the national minimum wage from 01/04/25. Kerswella has been mindful of the potential cost increases and modelled their effects for both the 2025/26 and 2026/27 budget plans. Following the Lottery's advice on repurposing the grant, trustees have decided to hold some funds for use towards the employers' extra costs.

The budget out-turn for 2024/25 is included as Annex A.

2. Our main project in 2024/25 - 'Kerswella in Ipplepen'



a) Introduction:

Our 'Kerswella in Ipplepen' project is designed to achieve our aim to make our offer equal across our communities. From our existing work and discussions with Ipplepen groups, their priorities fit with our broader aims as set out above - transport for medical/well-being appointments, trips/visits, local befriending and continued support for the Memory Cafe. New areas there are help with the senior lunch club and partnering with The Hub community centre. In addition, there is a new project to support warm space and free meals (partnering with a group running this in North Devon) to help with the cost-of-living crisis and again particularly for residents experiencing loneliness and social isolation.

Another aspect to meet our aims is to work closely with KKIPP surgery 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. Many of these are related to mental health and well-being and a sum was included in the 3-year Lottery budget plan.

The following statements are those agreed with the Lottery for the 3-year project period.

b) Planned impact:

This will build on the assessments, data and case studies. There are several measurable outputs to assess our impact:

- an increase in numbers of residents that we assist with transport for medical/well-being 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 for transport, befriending and social inclusion
- working towards having similar facilities in Ipplepen to those that are available in Kingskerswell whilst taking account of and respecting the extent to which there are different needs in the communities.

In the short-term - we will raise our profile across the Ipplepen communities, improve our local focus and identify needs for transport, befriending and social activities in our older vulnerable age-group that might otherwise be overlooked.

In the longer-term - we expect to improve residents' confidence by encouraging the use of our transport for social events thereby improving their well-being and reducing isolation by increasing social contacts. We know that this works in Kingskerswell from our feedback from residents, volunteers and our own assessments. We will continue that work in Kingskerswell. Contact with other people and sharing common experiences is often as important as the social activity itself. The aim is to have a services range and support network as vibrant as it is in Kingskerswell. And if the demand justifies it, another WAV vehicle or small minibus in Ipplepen would be included in a longer-term plan for which Kerswella would take a lead in fundraising.

c) Delivery and timescales:

Year 1 targets - 2024

- (i) recruit the new Co-ordinator based in Ipplepen. This will enable Kerswella to hit the ground running particularly if it is possible to address this in advance in the autumn 2023. We will also take the opportunity to review the job descriptions of the existing staff to ensure their currency for the project's term and beyond

[See Note 1](#)

- (ii) recruit our additional volunteers in Ipplepen to bring the complement up to 10. This was a target in the Devon transport project but only partially met

[See Note 2](#)

- (iii) develop the relationship with The Hub and linking with their groups and volunteers to galvanise local support that will make the Co-ordinator's role that much easier and more effective.

[See Note 3](#)

Year 2 targets - 2025

- (i) fundraising to enable certain activities & projects to take place as is the case in 2023

[See Note 4](#)

- (ii) consider small bus purchase initially for Kingskerswell but for sharing with Ipplepen

See Note 5

- (iii) recruit a further 5 volunteers in Ipplepen to formalise the befriending and transport services there.

Year 3 targets - 2026

- (i) continue with fundraising
- (ii) consider Ipplepen WAV/small bus purchase
- (iii) recruit a further 5 volunteers in Ipplepen to bring the total up to 20 over the 3 years and ensure that services are fully established.

In year 3, Kerswella will be developing a new plan for consolidation and future growth depending on needs assessed at the time and working with NHS professionals to identify future priorities.

Kerswella has considered the risks that might lead to the project being unsuccessful but this is unlikely because:

- ❖ the Ipplepen community is keen for us to get more involved and has already invited us to help in the areas we have already outlined
- ❖ from existing projects we are aware of unmet needs
- ❖ KKIPP is supportive that our approach and objectives are correct
- ❖ financial risk is minimised through our partnership working - resources pooled, access to different grant streams etc.

d) Aims and outcomes

Kerswella Care aims to help reduce loneliness and promote social inclusion by way of a variety of support services and activities. The 'Kerswella in Ipplepen' project is designed to achieve our aim to make our offer equal across our communities.

Outcomes to include:

For beneficiaries:

- a sustained increase in numbers of residents assisted with transport for medical and well-being appointments
- increased opportunities for transport for trips and activities
- ensuring similar and sustainable facilities in Ipplepen to those that are available in Kingskerswell - Lunch Club, Memory Café, warm space and free meal provision
- Improve residents' confidence by encouraging the use of transport for social events thereby improving their well-being and reducing isolation by increasing social contacts.

For volunteers/staff:

- additional local volunteers for transport, befriending and social inclusion
- ensuring that different groups work together seamlessly
- redefined staff responsibilities within our enlarged Co-ordinator team.

For the organisation:

- improved data, monitoring and evaluation+
- website and systems geared to fit the changing needs of residents via an expanding organisation

- new trustees to represent the communities as activities & projects expand
- Kerswella will develop a new plan for consolidation and future growth and work with NHS professionals to identify future priorities.

For the wider community:

- ensuring that community organisations are sustainable for residents
- working together to produce opportunities for securing funding for priorities.

The numbers of individuals expected to benefit: 795 beneficiaries will be supported each year, as well as a further 10 volunteers recruited to provide equitable support across Kingskerswell and Ipplepen. Numbers of beneficiaries are as follows actual Ipplepen numbers in blue:

- 1) transport for medical & well-being appointments - 275
(based on transport data across the whole year)
2024/25 - 250
- 2) trips & activities - 50
(based on 5 trips for 10 residents)
2024/25 - 254 comprising trips 100, Grief Café 36, Digital drop-ins 48, Trailblazers group 120,
- 3) senior lunch club (200) & Memory Café (160) - 360
(based on the current uptake - 20 residents at Lunch Club and 16 at the Memory Café at 10 events)
2024/25 - 240 - Memory Café
- 4) warm space & free meal - 60
(based on 20 residents at 5 events)
2024/25 - 140
- 5) improved health & well-being via befriending visits - 50
(based on 10 residents with 5 visits)
2024/25 - 50 for 2 residents

Total - 795

Total - 2024/25 - 934

So whilst the overall total is very encouraging, the activity mix is slightly different from our original expectations. Clearly there is still scope for activities such as befriending to increase and we are sure that this will happen as Kerswella gets better known within the Ipplepen community.

e) What we have achieved in 2024/25:

Note 1 - our Ipplepen Co-ordinator was appointed for a 3-year fixed term from 01/04/24 for 16 hours per week. Job descriptions were updated for all staff in the spring 2024 and staff responsibilities clarified. Targets were set in the performance management process in the summer 2024 for review in 2025.

Note 2 - an increase in the number of volunteers to 7 which is a net increase of 2

Note 3 - see the following list of activities and projects underway to understand the 1st year impact of Kerswella's project

Note 4 - see finance section for grants received in 2024 for activities and projects with some available in 2025.

Note 5 - one of the performance management targets for the Ipplepen Co-ordinator was to carry out a review of transport arrangements including use of the WAV and pros and cons of acquiring a minibus. This assessment has been done and recommendations will be discussed with trustees in April 2025.

f) Activities and projects supporting our achievements:

Please check out our website for further details on our activities and projects and the leaflet in Annex A. Working with the community and responding to local requests and needs particularly in Ipplepen, the following are currently in place:

- ✓ **Memory Cafés** - these are held monthly and continue to be well-attended in both Kingskerswell and Ipplepen co-ordinated by a member of staff from KingsCare League of Friends who organises a wide range of activities. Numbers are in the range 20 to 25. In April 2024 the Ipplepen Committee asked if Kerswella would take on the treasury role. This we were happy to do.
- ✓ **Grief Café** - this is a new initiative to provide support to residents and families the chance to talk about issues in an informal setting. This has now been running for 6 months in Ipplepen. Initially this was led by two Ipplepen volunteers. A local celebrant has become involved and now leads the sessions as a volunteer although under Kerswella's guidelines. Provision has now been extended to Kingskerswell with now 2 sessions. Numbers in each group are around 6. For the time being the funding set aside in the budget for well-being support has not been used because of the volunteer support currently available.
- ✓ **Digital drop-ins** - Kerswella sought financial support for our project work from the Home Instead Foundation. Although they could not award any grants, their local co-ordinator offered to help with activities and, given her expertise, set up sessions once a month in Kingskerswell and Ipplepen to enable our older and less confident residents to navigate their mobile phones, laptops and tablets assisted by our Ipplepen Co-ordinator who has an ICT background. This has been well-received with around 8 attending the sessions in each village - 6 in Ipplepen & 3 in Kingskerswell.
- ✓ **Trailblazers** - an Ipplepen group known as the Evergreens folded during the Covid lockdowns. Kerswella has been instrumental in restarting this social group as the Trailblazers group following the community's approach. The first meeting was in October with a further 5 since. It is a get-together with speakers, games, quizzes and visits with the group setting the agenda. Encouraged by our Ipplepen Co-ordinator, group numbers now exceed 20. As a result a larger venue will be required for their events in 2025/26.
- ✓ **Warm space/hot meal** - in 2023 we received £500 from the Teignbridge small lottery fund to cover costs for setting up and providing a warm space and free hot meal across our communities provided by our chef through her charity, the Benita Trust. Working with the Trust, 3 free meals events were held in Ipplepen including the pre-Christmas event there where over 60 attended. It was decided not to follow this up in the same way in 2025/26 but after further thought 2 more events are now planned.
- ✓ **Trips & visits** - this is a real success story for 2024/25 and one that we will be taking forward into 2025/26 using additional grant income approved for this purpose (see finance section). We have arranged 25 day

trips between April 2024 and March 2025 including combined for Kingskerswell/Ipplepen. Group sizes are typically 15 and we have taken our residents to garden centres, restaurants, the theatre & panto to name but a few. Often there is a waiting list! Old friendships are rekindled and new ones made. And new volunteers have come forward in both Ipplepen and Kingskerswell to act as chaperones. Altogether our trips and visits have enabled 325 of our residents to enjoy time out with friends including around 100 from Ipplepen.

- ✓ **Transport for hospital/medical/well-being appointments** - in the funding submissions we confirmed the following position in respect of the Ipplepen communities for the 4 months June to September 2023:
 - *99 requests with 84 that we could fulfil*
 - *Of the 321 total transport requests undertaken by Kerswella June to September 2023, 25% were from Ipplepen.*

The equivalent figures for 2024 are:

- *96 requests with 82 that we could fulfil.*
- *Of the 277 total transport requests undertaken by Kerswella June to September 2024, 30% were from Ipplepen.*

The figures for the whole year for the Ipplepen communities are:

- *289 requests with 250 that we could fulfil.*
- *Of the 797 total transport requests undertaken by Kerswella, 32% were from Ipplepen.*

The reasons for not being able to provide transport are either that the appointment was changed at short notice, there was insufficient time for us to arrange a driver or a driver was unfortunately not available at that time.

In summary, the proportion of transport undertaken in the Ipplepen communities has increased from around 13% in 2022, to 20% in the spring 2023, to 25% later in the year (as noted in the original bid) to 32% across 2024/25. We have noticed that the steady uptake in Ipplepen is from some of the more outlying communities such as the villages of Denbury and Broadhempston where public transport is more limited. This is a clear indication that our services are reaching out and being welcomed. Our Ipplepen Co-ordinator is responsible for co-ordinating needs across all the communities served by Kerswella.

- ✓ **Friends group** - the Friends group have met twice in addition to the two social get-togethers to thank them for all their hard work and support. Invitations are open to all volunteers across all our communities. The trustees ensure that the group are consulted about the content of the Annual Report and accounts with feedback invited so that any comments can be included prior to submission to the Charity Commission.
- ✓ **Kingskerswell pavilion café** - this Tuesday event continues to thrive to bursting point! We have relocated the Kingskerswell Memory Café there as the venue provides a more pleasant and warm environment for our residents and access is much easier particularly for the disabled. In the last month, we have begun bringing 5 or 6 Ipplepen residents to this café in Kingskerswell and this integration has been well received. It is also the venue for the Kingskerswell Grief Café and Digital Drop-ins.

- ✓ **Lunch Clubs** - the monthly Kingskerswell Lunch Club continues to be well-supported by the community and ably led by our chef who has formed the Benita Trust. The 2024 Christmas lunch was a particular success with over 60 guests enjoying a 3-course traditional lunch with all the trimmings. At the 2024 year end our chef was approached to help with the lunch arrangements in Ipplepen and work alongside existing volunteers at the Hub. Originally it was the intention to appoint a chef but a combination of someone to oversee the catering arrangements at the Hub with the volunteers is seen, at least for the time being, as a way forward but it may be a development project in 2025/26. It is an example of our partnership working. Numbers attending the Kingskerswell Lunch Club continue to be strong - in the range 55 to 60 at each event.
- ✓ **Coffee mornings** - these continue to be held twice a month in Kingskerswell and attendance is strong - usually in the range 40 to 50 but often weather dependent! We are discussing if there is any help the coffee morning group might need from us. It transpires that one way might be to support a coach trip they are planning in the summer 2025. We could offer some support from the local grant income we have received if this would be helpful and encourage residents by keeping the trip cost down. We have explained that we are able to do this because of our Lottery funding.
- ✓ **Befriending** - in 2024/25 there were 190 visits in total 50 of which were for 2 Ipplepen residents (and 8 in Kingskerswell). Kerswella's befriending service aims to reach older people who may experience loneliness or are living in circumstances that cause isolation. This may result in physical or mental deterioration which could put the older person at risk. So our objective is for volunteers to provide primarily some companionship and mental stimulation to enhance the well-being of the client. Volunteers are not there to replace professional support, care or advice but can provide occasional assistance with tasks, such as shopping, prescription collecting or transport within the context of an ongoing relationship, by mutual agreement and with the consent of all concerned.

g) **Volunteers, governance and partnerships:**

- **Volunteers** - whilst the number of volunteers is healthy, it has been more difficult to recruit additional volunteers particularly in Ipplepen in this first year and this will be a challenge for 2025/26. At the start of the project we had 45 volunteers. We now have 49 on our register. There has been turnover in 2024/25 - some have retired but we have welcomed new volunteers particularly as chaperones for our trips and visits. 7 volunteers on our register are Ipplepen based. At least a further 10 work across all our communities in some capacity even though they are primarily based in Kingskerswell.

We have 25 volunteers of the 49 total that are drivers and 7 are Ipplepen based. Again around a further 7 are available to work across all our communities.

- **Governance** - in 2024 a trustee from the Ipplepen community was appointed to fill a vacancy on the board. As he is a Parish Councillor there, this has again reinforced links with the community and close working with the Co-ordinator based there. In his role as Parish Councillor regular reports are made on Kerswella's activities and projects to the Parish Council.
- **Partnerships** - there are several aspects to this:

- KingsCare League of Friends - our close relationship with KingsCare continues with ongoing support to the Memory Cafés by providing a member of staff to co-ordinate the monthly meetings, and helping us with vehicles for our many trips (others are hired from another local charity - Newton Abbot Community Transport).
- Ipplepen Methodist Church & the Hub - our work with the Hub in Ipplepen where our Co-ordinator is based has led to strong links with many groups there. Our presence has been well received by residents. This in turn has seen word spread that Kerswella is available to see if we can help with other local activities including the setting up of new ones. We have been encouraged to use The Hub community space on a Wednesday rather than it being closed as this is their quiet day.

In February 2025, a Kerswella/Hub partnership group was established to take stock, review activities and plan things together where appropriate with the intention that this meets formally every six months.

- Kingskerswell & Ipplepen Medical Practice (KKIPP) - our links to and membership of the Patient Participation Group (PPG) run by KKIPP is important so that we are aware of the developments within the local health teams including patient needs and can respond where appropriate.

At a group meeting of the Practice on 27/02/25, the use of transport for well-being appointments, trips and visits was discussed and it was agreed to look at ways of combining appointments to ensure that transport is organised more efficiently both from the point of view of the Practice and volunteer time. The Kerswella suggestion that a minibus would be a useful addition to the wheelchair accessible vehicle was welcomed and so, as a next step, a specification and the finances needed for the purchase will be worked up and a plan put in place. Funding will come from several sources including a contribution from the Lottery grant if possible.

- Local Parish Councils - our relationship with Kingskerswell Parish Council continues to be strong with use of the pavilion café space on Tuesdays and now for the Memory Café on a Thursday afternoon. In Ipplepen, the Parish Council has invited us to their next meeting in April to discuss progress to date and ways in which working together can build on the activities in 2024/25 going forward into 2025/26.
- Communications - the Ipplepen Co-ordinator's background is in ICT and so we have harnessed that expertise to improve our social media communication and the Kerswella website. There is regular publicity via notices placed in the Ipplepen monthly magazine for all that is going on - this magazine has full village coverage and is the best way of providing information on our activities.

Towards the end of the year, and to coincide with our VE Day raffle publicity, a series of 'meet the team' sessions were being planned particularly in Ipplepen. Residents will be able to find out more about Kerswella's work, the availability of local support, think about volunteering - and, of course, buy some raffle tickets!

h) Challenges and changes in 2025/26:

Kerswella enters 2025/26 on a positive note. Our partnership with the Hub is sound and we are intent on periodic joint meetings to ensure that when new activities and projects are discussed in the community, we are in a good place to respond and can co-ordinate that response. For example, at our recent meeting, some ideas were raised - reforming the Ipplepen walking group, investigating the options for seated exercise and resurrecting other local groups that lapsed during Covid. We shall be helped in this with the planned adaptation of the Hub building to provide additional community areas although the timing of this is as yet uncertain.

We know that the Ipplepen community has been developing ideas for new activities in 2025/26 and we shall consider how Kerswella can help take these forward. We expect the 'meet the team' events planned for April and May will also provide further information on these, further ideas and feedback from residents on how we have done in terms of what we have helped to develop so far.

In Kingskerswell our activities are well-established and well-attended. Several of the Ipplepen initiatives have also been well-received in Kingskerswell. And trips & visits are very popular in both communities.

The KKIPP has a new practice manager and new ideas will come because of even closer working with our local health professionals as outlined in the section above. At present their priority is for us to embed and improve the range of activities currently in place.

At the same time as success, we notice challenges. Of concern is the availability of new volunteers. Whilst some new ones have come forward in 2024/25, we are aware of the need to refresh our numbers. This is made more difficult by the deferral of the state pension age with more potential volunteers therefore still in work. Many too have caring responsibilities either as grandparents or for elderly parents. And in respect of younger volunteers, cost of living pressures mean that many do not simply have the time to volunteer. This seems to affect groups generally. We hope that the 'meet the team' sessions will raise awareness of our need for volunteers.

In May 2025, a raffle is being planned to coincide with the 80th anniversary of VE Day that just happens to fall on our Lunch Club date in Kingskerswell as so it will be a special occasion with entertainment to match. In November 2025 the 2nd instalment of funding is receivable from the Co-op Local Community fund arising from the 2024 bid. In both cases the funding is to be focussed on transport, trips and visits.

September 2025

Annex A - budget out-turn statement for 2024/25

Kerswella Care
Income & Expenditure - year ending 31/03/25

1 Income:	
a - Grants	£51,222.50
b - Activities - main	£9,179.48
c - Activities - transport donations	£6,800.99
d - Activities - other	£3,956.53
e - Projects	£4,372.69
f - Donations - individuals	£1,945.49
g - Donations - groups/organisations	£1,954.20
h - Investments	£0.00
i - Other	£0.00
Total	£79,431.88
2 Expenditure:	
a - Staff related costs	£39,749.36
b - Capital costs	£0.00
c - Operating Costs	£3,875.52
	£43,624.88
3 - Activities & projects costs:	
a - Transport & trips	£7,601.25
b - Venue hire/visiting speakers	£1,950.00
c - Training & well-being support	£0.00
d - Volunteers' general expenses	£611.63
e - Meals & refreshments etc	£5,456.73
f - Residents' support	£773.26
g - Equipment & materials	£967.87
h - Sundry items	£1,756.80
Total	£62,742.42
Surplus of income	£16,689.46
Bank balance as at 31/03/24	£48,520.12
Bank balance as at 31/03/25	£65,209.58
Reserves to be allocated for:	
	£13,846.00
	£51,363.58
Total	£65,209.58

Kerswella Care
Activities - year ending 31/03/25

1 Memory Café:	
a - Income	£1,085.70
b - Expenditure	£1,110.46
Net	£24.76
2 Lunch Club:	
a - Income	£5,139.38
b - Expenditure	£6,204.28
Net	£1,064.90
3 Coffee mornings:	
a - Income	£3,534.40
b - Expenditure	£1,146.72
Net	£2,387.68
4 Transport:	
a - Income	£8,542.68
b - Expenditure	£3,941.47
Net	£4,601.21
5 Other Activities & projects:	
a - Income	£18,302.10
b - Expenditure	£6,714.61
Net	£11,587.49
6 Staff:	
a - Income	£42,827.62
b - Expenditure	£39,749.36
Net	£3,078.26
7 Operating costs:	
a - Income	£0.00
b - Expenditure	£3,875.52
Net	£3,875.52
Surplus of income	£16,689.46

- Representing reserves b/f from 2023/24
- Representing reserves to c/f to 2025/26
- Activities/projects (Restricted Funds)
- General use (Unrestricted Funds)

These accounts are prepared on a cash basis and reconciled to the bank account as at 31/03/25.

Grants received during the year are again all treated as restricted, ie to be spent on the purposes for which they were allocated.

General notes:

(i) **Ipplepen**

2024/25 marked the first year of our 'Kerswella in Ipplepen' project following approval by the Lottery in December 2023 with grant funding from 01/04/24 to 31/03/27. Working with the Hub community project, our Ipplepen Co-ordinator has developed many projects to reduce social exclusion and loneliness. These include a Grief Café, Digital Drop-in sessions for basic ICT support, help to a former community group that reformed - the Trailblazers, and, across the year, various trips and visits some jointly with Kingskerswell. These activities were in addition to our support for the Ipplepen Memory Café and for transport for hospital and well-being appointments where the uptake has increased steadily throughout the year. For the Memory Café, Kerswella was asked to increase its role by taking on the general management and treasurership and we were pleased to do so with continued support for the co-ordination of events and activities by KingsCare League of Friends. There are further details on all the Ipplepen activities, our links with the Hub and the Parish Council through our local trustee in our Annual Report. Towards the end of the year a number of ideas were being considered for 2025/26 with the Hub.

(ii) Kingskerswell

2024/25 saw a further full and busy year for all our activities and projects - social events (Memory Café, Lunch Club and coffee mornings), transport for medical and well-being appointments and, following requests from residents, the many trips and visits right across the year ranging from the theatre and panto to garden centres and restaurants. These were all very popular and well-attended with often a waiting list. With the full support from the Parish Council, Kerswella has continued to run the playing fields café in Kingskerswell on Tuesdays and hold the Grief Café and Digital Drop-in sessions there too. Because of the easier access, the monthly Memory Café is now located there on a Thursday.

(iii) Accounts etc preparation

This is the third year that Kerswella is responsible for preparing its own accounts, Annual Report and submitting these to the Charity Commission. The Trustees ensure that the Friends' group are consulted with information shared with them with feedback invited so that any comments can be considered for inclusion prior to submission. Trustees met four times in 2024/25 and meetings included reviews of the monthly accounts, budget preparation for the following year as well as the audit of financial procedures to reflect Charity Commission advice and to ensure their currency.

(iv) Staff costs

The arrangements for staff continued in 2024/25 whereby they are employed by KingsCare League of Friends but deployed to Kerswella Care under a service contract. The staff complement at the end of the year was 1.5fte and reflects the additional hours needed for our Ipplepen support. During the year, staff from KingsCare supported various Kerswella activities and projects - notably the Memory Cafes in Kingskerswell & Ipplepen - and their costs are included in line 2a along with all other staff-related costs.

Towards the end of the year, Trustees discussed the implications for 2025/26 and 2026/27 of the planned increase in employers' national insurance and minimum wages rates from 01/04/25 as a result of the October 2024 Budget and the financial provision needed.

(v) Grants

Grant balances for Covid-related & other projects were brought forward from 2023/24 (£7,205). Where necessary, approval was sought and given by the funding body for this and for any change in the grant use. Some were used to support the Ipplepen project. New grants received in 2024/25 are in income/expenditure line 1a) and activities line 5a) and also referred to in the notes below. At the year end £13,846 from grants received in 2024/25 and before will be carried forward for use in 2025/26. The grants total excludes the amount allocated to other voluntary groups by Kerswella on behalf of Devon Car Forum (£37,966). The same amount has been removed from expenditure lines.

(vi) Donations

Donations continued to be strong throughout 2024/25. 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 £250 or more, 2 collections at concerts totalling £650 and £430 from the family of our one of our residents who sadly passed away during the year. This was put towards our Christmas Lunch Club expenses. This was greatly appreciated by our residents many of whom were her friends.

Income & expenditure notes:

1a During the year, grants were received from:

- the National Lottery - for the 'Kerswella in Ipplepen' project - £41,913.
- Devon County Council - £4,614 total - Devon Car Forum - £4,114 (£1,741 for Kerswella) and the DCC Locality Fund for trips & visits - £500.
- Teignbridge District Council - a small lottery grant of £2,500 to support trips and visits in 2025.
- Co-op Local Community Fund - £1,415 including £500 to be carried forward for use in 2025/26 for trips, visit and activities.
- Devon Memory Cafes and project - £780 including £200 for activities in Ipplepen & £200 for Kingskerswell.

1b This comprises income for the Memory Café - £439, Lunch Club - £4,769 and Coffee mornings - £4,086.

1c This income excludes the Devon Car Forum grant - £1,741 which is part of the grants total.

1d Main income headings - Park café - £3,034, Teignbridge Lottery - £258, Kingskerswell Summer Fete - £192 and Abbfest - £260.

1e This includes residents' support & befriending - £777, trips and visits - £2,017 and Ipplepen Memory Café - £1,427.

2a These costs were recharged by KingsCare League of Friends.

2b None is shown here because Trustees agreed to use unrestricted reserves to increase the sinking fund provision in the accounts for the eventual replacement of the WAV - £2,000.

2c This comprises the liability insurance share - £1,086, subscriptions - £200, ICT services & support - £1,930, publicity and marketing - £284 and general equipment & resources - £375.

3a This includes all WAV running costs. Volunteers' expenses for the use of their own vehicles are also included here - £2,015.

3c Compared with last year, all costs are included in the staff heading and recharged by KingsCare League of Friends.

3f This includes £755 related to shopping costs for our residents. The remainder is for presents, birthday and special event 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. The small deficit is a charge on general funds.
- 2 The deficit is a charge on general funds. This includes a share of the cost of new hob for the Parish Centre - £295.
- 3 The surplus from this activity helps towards overall running costs funded from general funds.
- 4 This includes the £1,741 grant from Devon Car Forum with £987 paid to Kerswella for overseeing the fund for Devon for other voluntary groups.
- 5a This comprises all 'other activities' income - £3,957, donations - £3,899, grants for activities & projects - £3,700, projects income - £6,746 including Ipplepen Memory Café - £1,427, £90 received for the VE Day raffle and £2,373 for the Devon Car Forum to be held as a reserve.
- 5b This comprises all 'other activities' costs - £808 (mainly volunteers' expenses), residents' support - £862, Ipplepen Memory Café - £500, trips and visits - £3,660 and equipment, raffle and sundry costs - £884.
- 6 Income comprises Lottery grant funding - £41,913 and Co-op Local Community Fund - £915. Costs are as line 2a of the income/expenditure section.
- 7 Costs are as line 2c of the income/expenditure section.

Balance sheet notes:

5a Restricted Funds - activities & projects

At the year end, the total of unallocated restricted grants received in 2024/25 or before was £13,846. These are available to be allocated in 2025/26 as follows:

- the National Lottery Community Fund - 'Kerswella in Ipplepen' project *	£4,023.00
- Trips, visits and activities	£4,101.00
- Befriending, well-being and other residents' support	£713.00
- Projects from funding held for Devon CC - Car Forum reserve (including £2,636 b/f from 2023/24)	£5,009.00
(Entries related to income/expenditure for other voluntary groups from the Car Forum funding are excluded from these accounts).	
Total	£13,846.00

* - this is designated to support the additional employers' national insurance and minimum wage rates payable from 01/04/25 in line with the Lottery's advice that their grant should be repurposed to allow headroom in the budget for these costs to be absorbed.

5b Unrestricted Funds - general use

At the year end the total for unrestricted funds stood at £51,364. These are funds controlled by the Trustees that are not subject to any restriction as to their use. Trustees are therefore able to allocate these for any purpose that they see fit in furtherance of the charity's Object.

In 2024/25, it was considered prudent to designate funds to cover a minimum of 6 months' operating costs (£12,000) but to make this the subject of regular review. Trustees reaffirmed this in the budget setting discussions for both 2025/26 and 2026/27 and, given the uncertain economic times and the extra costs and pressures likely to prevail on charities' funds, are now minded to increase this to £15,000 in those years.

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

- Operating costs	£12,000.00
- Contribution towards the cost of the WAV replacement	£6,000.00
- Transport and project support etc - including net raffle proceeds	£8,060.00
Total	£26,060.00

After deducting this provision, the balance is held as free reserves. At the year end 2024/25 this is £25,304.

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 variances, i.e., items over £500, where any omission could distort the true and fair view. In 2024/25 there are 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
01/04/2024

To

Period end date
31/03/2025

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	-	51,222	-	51,222	-
b - Donations & legacies	3,900	-	-	3,900	-
c - Charitable activities	18,727	1,626	-	20,353	-
d - Other trading activities	3,958	-	-	3,958	-
e - Investments	-	-	-	-	-
f - Other income	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	26,585	52,848	-	79,433	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	26,585	52,848	-	79,433	-
A3 Payments					
a - Staff-related costs	75	39,455	-	39,530	-
b - Operating costs	5,822	-	-	5,822	-
c - Charitable activities supplies	10,639	6,752	-	17,391	-
d - Other expenses	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	16,536	46,207	-	62,743	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	16,536	46,207	-	62,743	-
Net of receipts/(payments)	10,049	6,641	-	16,690	-
A5 Transfers between funds			-	-	-
A6 Cash funds last year end	41,315	7,205	-	48,520	-
Cash funds this year end	51,364	13,846	-	65,210	-

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 31/03/25	51,364	13,846	-
		-	-	-
		-	-	-
	Total cash funds	51,364	13,846	-
	(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

31/3/2025

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:

29/8/25

Name:

Ian Fennicott FPFS

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

CHARTERED FINANCIAL PLANNER
REGULATED BY THE FCA

Address:

12 TORQUAY ROAD

KINGSKERSWELL

NEWTON ABBOT TQ12 5EZ