



# Trustees' Annual Report for the period

| From | Period start date |    |      | To | Period end date |    |      |
|------|-------------------|----|------|----|-----------------|----|------|
|      | 22                | 07 | 2222 |    | 31              | 03 | 2023 |

## Section A administration details

## Reference and

Charity name

LIFE - Linking Inclusive Families through  
social Events

Other names charity is known  
by

Registered charity number (if  
any)

1199755

Charity's principal address

18 Livingstone Way,

St Athan, Barry,

Vale of Glamorgan,

Postcode

CF62 4JG

## Names of the charity trustees who manage the charity

|           | <b>Trustee name</b>       | <b>Office (if any)</b>      | <b>Dates acted if not for whole year</b> | <b>Name of person (or body) entitled to appoint trustee (if any)</b> |
|-----------|---------------------------|-----------------------------|--|--|
| <b>1</b>  | <b>Rachael Sherman</b>    | <b>Chair</b>                |  |  |
|           |                           | <b>Events Co-Ordinator</b>  |  |  |
| <b>2</b>  | <b>Emma Griffiths</b>     | <b>Secretary</b>            |  |  |
|           |                           | <b>Safeguarding Officer</b> |  |  |
| <b>3</b>  | <b>Tracy Sloper</b>       | <b>Treasurer</b>            |  |  |
| <b>4</b>  | <b>Samantha Carpenter</b> |                             |  |  |
| <b>5</b>  | <b>Catherine Thomas</b>   |                             |  |  |
| <b>6</b>  |                           |                             |  |  |
| <b>7</b>  |                           |                             |  |  |
| <b>8</b>  |                           |                             |  |  |
| <b>9</b>  |                           |                             |  |  |
| <b>10</b> |                           |                             |  |  |
| <b>11</b> |                           |                             |  |  |
| <b>12</b> |                           |                             |  |  |
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| <b>14</b> |                           |                             |  |  |
| <b>15</b> |                           |                             |  |  |
| <b>16</b> |                           |                             |  |  |
| <b>17</b> |                           |                             |  |  |
| <b>18</b> |                           |                             |  |  |
| <b>19</b> |                           |                             |  |  |
| <b>20</b> |                           |                             |  |  |

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

|  |             |  |
|--|-------------|--|
|  | <b>Name</b> | <b>Dates acted if not for whole year</b> |
|  |             |  |

### **Names and addresses of advisers (Optional information)**

| <b>Type of adviser</b> | <b>Name</b>             | <b>Address</b>   |
|------------------------|-------------------------|--|
| <b>Accountant</b>      | <b>Mrs Jodie Davies</b> | <b>202 Railway Road, Golwg Y Mor, Rhoose, United Kingdom, CF62 3FG</b> |
|                        |                         |  |
|                        |                         |  |
|                        |                         |  |

### **Name of chief executive or names of senior staff members (Optional information)**

|  |
|--|
|  |
|--|

## **Section B management**

## **Structure, governance and**

### **Description of the charity's trusts**

|   |  |
|---|--|
| <b>Type of governing document<br/>(eg. trust deed, constitution)</b>        | <b>LIFE - Linking Inclusive Families through social Events is governed by its constitution documentation.</b>  |
| <b>How the charity is constituted<br/>(eg. trust, association, company)</b> | <b>LIFE - Linking Inclusive Families through social Events is a:<br/><br/>CIO - Charitable Incorporated Organisation.</b>  |
| <b>Trustee selection methods<br/>(eg. appointed by, elected by)</b>         | <b>The charity is administered by a Board of Trustees who meet regularly to oversee all activities of the charity and to ensure it adheres to a clear direction for the charity.<br/><br/>New trustees are elected by the current board of</b> |

existing trustees.

All new trustees are fully informed of the charity's aims and how it operates. They will be, on appointment provided with a copy of the governing document, most recent set of accounts also given copies of relevant Charity Commission literature, such as "CC3 The Essential Trustee" and "Guidance for Charity Trustees" to read, sign and date.

All trustees are requested to complete an enhanced DBS Disclosure.

All trustees are required to undertake safeguarding and GDPR training as a must as the families we support are often vulnerable.

Trustees are also encouraged to undertake personnel development training where appropriate.

Trustees meet regularly, to enable them to discuss and monitor the charity's activities, discuss progress, set goals, assess outcomes, monitor finance, and discuss any other matters of business. All trustees give of their time freely and no trustee remuneration was paid during this year.

Each trustee that is elected is able to serve for a period of three years.

#### **Additional governance issues (Optional information)**

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

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity

#### **Policies & Procedures:**

Below is a current list of the policies and procedures that LIFE - Linking Inclusive Families through social Events has in place. As a newly registered charity we are constantly evolving and reviewing our policies and for best practice we have introduced that a policy review is undertaken on an annual basis allowing LIFE to evaluate the effectiveness of each specific policy. When a policy is not working well, it is reviewed, updated and managed to improve its effectiveness going forward.

1. ***Privacy Policy 2022***
2. ***Safeguarding Policy 2022***

works;

- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

3. ***Social Media Policy 2022***
4. ***Trustee Code of Conduct 2022***
5. ***Volunteering Policy 2022***
6. ***Trustee Induction Policy 2022***
7. ***Risk Management Policy 2022***
8. ***Health and Safety Policy 2022***
9. ***Fundraising Policy 2022***
10. ***Conflict of Interest Policy 2022***
11. ***Equality and Diversity Policy 2022***
12. ***Complaints and Grievance Policy 2022***
13. ***Governing Document 2022***

**Training:**

**Emma Griffiths:**

1. **GDPR Certificate on 15th May 2022**
2. **Health and Safety for Events Certificate on 15th May 2022**
3. **Mental Wellbeing in Children and Young People Certificate on 11th May 2022**
4. **Safeguarding Children Certificate on 11th May 2022**
5. **Safeguarding Vulnerable Adults Certificate on 15th May 2022**

**Rachael Sherman:**

1. **Safeguarding children with disabilities enrolment date: May 11, 2022**
2. **Safeguarding children level 2 enrolment date: May 11, 2022**
3. **Safeguarding adults level 2 enrolment date: May 11, 2022**
4. **Food hygiene and safety for caterers (level 2) enrolment date: September 11, 2022**
5. **General data protection regulation (GDPR) enrolment date: May 21, 2022**
6. **Food hygiene & safety basic (level 1) enrolment date: September 11, 2022**
7. **Effective supervision a practical guide for adult social care managers and supervisors enrolment date: June 14, 2022**
8. **Assessing competence for the care certificate enrolment date: June 14, 2022**
9. **Makaton Taster Session Level One November 18, 2022**

**Tracy Sloper:**

1. **General Data Protection Regulation (GDPR) enrolment date: June 8, 2022**

2. Safeguarding Children level 2 enrolment date: May 22, 2022
3. Safeguarding Children with Disabilities enrolment date: May 22, 2022

**Child Protection Issues:**

No issues were reported. All current trustees have an enhanced DBS certificate and currently 3 trustees have completed Safeguarding training.

**Complaints:**

We are pleased to report no official complaints were received during this period.

## Section C Objectives and activities

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

The purposes of the charity as set out in its governing document are:

"For the relief and assistance of children, young adults, families and carers in need by reason of learning difficulty or disability in The Vale of Glamorgan and surrounding areas, in particular but not exclusively by arranging recreational events."

L.I.F.E. is a locally based charity that is;

Linking Families, (supporting each other through life, for life)

Inclusive to all

Family at the heart

Events bringing us together

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

Declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit

All trustees are fully informed of the charity's aims and how it operates. They will of also, on appointment provided with a copy of the governing document, most recent set of accounts also given copies of relevant Charity Commission literature,

such as "CC3 The Essential Trustee" and "Guidance for Charity Trustees" to read, sign and date.

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**Summary of the main events/activities we carried out this year for the public benefit in relation to our aims and objectives:**

**2 x Membership Sign up Events**

**Sunday 25<sup>th</sup> September 2022 @ 10.30am, 1.30pm & 4.30pm**

**Saturday 04<sup>th</sup> March 2023 @ 10.30am, 1.30pm & 4.30pm**

**Initial membership fee was charged @ £10.00 per family due to there being only 6 full months remaining in the financial year from the day of sign up.**

**Breakdown of Families Supported Between 22/07/2022 - 01/04/2023:**

**31 x Families across the Vale of Glamorgan**

**15 x Families across Cardiff**

**01 x Family in Mid Glamorgan**

**Total 47 Families which includes 03 x Sub Families.**

**Breakdown of Events Between 22/07/2022 - 31/03/2023:**

**2 x Cancelled Events**

**SAT, 29 OCT 2022**

**~~Family Coach Trip to Folly Farm~~**

**REASON: Cancelled due to not being cost effective for our families due to high cost of coach hire along with fuel and lack of coach drivers.**

**TUES, 24 JAN**

**~~Tuesday Evening Bingo Social Event~~**

**REASON: Cancelled due to lack of interest from our members for this particular session.**

**02 x Membership Sign up Events**

**09 x Monthly Coffee Mornings**

**12 x Family Events**

public benefit)

**06 x Parent / Carer Only Events**  
**06 x Young Person's Only Events**

**Total of 35 Events between 22/07/2022 - 31/03/2023**

**List of events organised between 22/07/2022 -**  
**31/03/2023**

**MON, 24 OCT 2022**  
**Family Halloween Night-Time Scare Trail**

**SAT, 29 OCT 2022**  
**~~Family Coach Trip to Folly Farm~~**

**SUN, 30 OCT 2022**  
**Exclusive Family Swim Session**

**TUES, 1 NOV 2022**  
**Unbelievable Science**

**WED, 2 NOV 2022**  
**Ten-Pin Bowling**

**FRI, 4 NOV 2022**  
**Exclusive Air Venture Session**

**SAT, 19 NOV 2022**  
**Welsh Wrestling - LIVE**

**TUES, 22 NOV 2022**  
**Parent / Carer Christmas Craft Session**

**THURS, 8 DEC 2022**  
**Parent/Carer Festive Lunch**

**WED, 14 DEC 2022**  
**FAMILY CHRISTMAS ILLUMINATIONS @ FONMON CASTLE**

**WED, 21 DEC 2022**  
**Santa's Wish - A Magical New Musical**

**THURS, 29 DEC 2022**  
**Peter Pan on Ice**

**FRI, 30 DEC 2022**  
**Exclusive Family Swim Session**



**THURS, 19 JAN**  
**Thursday Lunch & Bingo Social Event**

**THURS, 19 JAN**  
**Thursday Evening Bingo Social Event**

**FRI, 20 JAN**  
**CIRQUE -THE GREATEST SHOW**

**TUES, 24 JAN**  
**Tuesday Lunch & Bingo Social Event**

**TUES, 24 JAN**  
**~~Tuesday Evening Bingo Social Event~~**

**SUN, 19 FEB**  
**Exclusive Family Swim Session**

**MON, 20 FEB**  
**Golf Session @ GB Academy**

**TUES, 21 FEB**  
**Ninja Warrior - Cardiff**

**WED, 22 FEB**  
**Ten-Pin Bowling**

**THURS, 23 FEB**  
**DISNEY ON ICE PRESENTS DISCOVER THE MAGIC**

**FRI, 24 FEB**  
**Roc Bloc Climbing Session**

**THURS, 2 MAR**  
**Parent / Carer St David's Day Lunch**

**WED, 29 MAR**  
**Easter Duck Race**

**FRI, 31 MAR**  
**LIFE MEMBERSHIP RENEWAL 2023 - 2024**

**We feel the charity is off to a great start and on reflection achieved a great deal in such a short space of time. As the list above reflects, we have managed to organize and execute many varied events with something to appeal to every one of our**

**service users.**

**Events like this are costly to run but so vital to the well-being of our families, particularly during the current financial climate when families may find themselves struggling to make ends meet.**

**We are proud that we can offer partially subsidised trips and events to our families so they may have the opportunity to participate in recreational activities with both social and financial support.**

## **Section D Achievements and performance**

**What did LIFE achieve between 22/07/2022 - 01/04/2023?**

**L.I.F.E formed a board of 5 volunteer parent trustees all of whom have children / young adults with disabilities of their own.**

**We, after much deliberation agreed on a charity name and logo.**

**LIFE registered with the charity commission on Friday 22<sup>nd</sup> July 2022.**

**Purchased a domain name and email address - [Info@aln-charity.co.uk](mailto:Info@aln-charity.co.uk) (website not currently live)**

**Produced a public Facebook profile to allow the general public to follow our work and us to signpost our followers to information that we think relevant and beneficial to inclusive families and our local area.**

**We successfully opened bank accounts in the charity's name.**

**We obtained funding from Newydd Housing Association for the sum of £750.00.**

**Attaining these restricted funds was vital in supporting us set up the charity as it enabled us to:**

**Submit an application @ £40.00 to apply for the Vale of Glamorgan's Small Society Lottery License to enable us to be able to continue our own fundraising.**

**Purchase 5 x Enhanced DBS checks for all L.I.F.E.'s board of volunteer parent trustees.**

## **Section D**

## **Achievements and performance**

**Purchase 5 x L.I.F.E.'s board of volunteer parent trustees to access and carry out an accredited Level 2 courses in: Safeguarding children with disabilities.**

**Purchase 5 x L.I.F.E.'s board of volunteer parent trustees to access and carry out an accredited Level 2 courses in: Safeguarding children.**

**Purchase 5 x L.I.F.E.'s board of volunteer parent trustees to access and carry out an accredited Level 2 courses in: Safeguarding adults.**

**Purchase 5 x L.I.F.E.'s board of volunteer parent trustees to access and carry out an accredited General Data Protection Regulation Course.**

**Purchase 5 x ID badges for all L.I.F.E.'s board of volunteer parent trustees enabling them to be easily identified at our social events.**

**Purchase 5 x Polo-shirts displaying L.I.F.E.'s charity logo for all L.I.F.E.'s board of volunteer parent trustees, enabling them to be easily identified at our social events and activities.**

**We were also very grateful to Ogi and Costco (Cardiff) for their unrestricted donations of £250.00 and £80.00 respectively as this funding was used to kick start our events programme and organise 2 x exclusive family swim sessions for our service users to be able to access.**

**We strived to connect and form professional partnerships with many other local venues and businesses within the Vale of Glamorgan and surrounding areas to enable us to carry out the charity's aims and objectives of organising and accessing event, activities and trips for our service users.**

**We were delighted to welcome a total of 47 Families which includes 03 x Sub Families.**

**as members/service users:**

**31 x Families across the Vale of Glamorgan**

**15 x Families across Cardiff**

**01 x Family in Mid Glamorgan**

**We were able to organise and execute a total of**

**02 x Membership Sign up Events**

**09 x Monthly Coffee Mornings**

**12 x Family Events**

**06 x Parent / Carer Only Events**

**06 x Young Person's Only Events**

## **Section D**

## **Achievements and performance**

**Total of 35 Events between 22/07/2022 - 31/03/2023**

**Sadly we had to cancel 2 planned events for reasons beyond our control:**

**SAT, 29 OCT 2022**

**Family Coach Trip to Folly Farm**

**REASON:** Cancelled due to not being cost effective for our families due to high cost of coach hire along with fuel and lack of coach drivers.

**TUES, 24 JAN**

**Tuesday Evening Bingo Social Event**

**REASON:** Cancelled due to lack of interest from our members for this particular session.

**We also held two fundraising evenings of our own;**

**Friday 17<sup>th</sup> February 2023 - Back to the 80's Disco with DJ Gwyn Good @ The Market Street Club in Barry**

**Saturday 18<sup>th</sup> March 2023 - Race Night with Ginatra @ The Market Street Club in Barry**

**LIFE is primarily promoted using social media, where numbers are growing steadily, word of mouth and other free resources which include advertising in our local Family Information Service regular Newsletter within the Vale of Glamorgan Council and Dewis Cymru Directory.**

## **Section E**

## **Financial review**

**Brief statement of the**

**LIFE does not currently have a policy on reserves in**

c/o 18, Livingstone Way, St Athan, Barry, Vale of Glamorgan, CF62 4JG  
Registered Charity Number 1199755

charity's policy on reserves

place due to being in its first year of being registered as a charity on 22<sup>nd</sup> July 2022.

If and when we have accumulated sufficient unrestricted funds in the charity's bank account we will look to implement a reserves policy.

Our financial reserves are currently reviewed on a regular basis at our trustee meetings and the level of cash reserves reviewed to ensure any long term liabilities are covered as we continue to develop our financial systems and reporting as the charity continues to move forward and grow.

Details of any funds materially in deficit

N/A

#### Further financial review details (Optional information)

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

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

**LIFE currently holds three NatWest Business Bank Accounts.**

#### **LIFE - Linking Inclusive Families through social Events - Events Account**

This is a business account. It is used solely as a holding account allowing LIFE to collect payments from our members for upcoming events. Once the event is due for payment the total amount collected for each event is then transferred across to the second business account (Main Account)

#### **LIFE - Linking Inclusive Families through social Events - Main Account**

This is a business account and is used to pay for all our events we organize and issue any refunds to our members. All donations and grant funding would also be deposited straight into this account. We also use this account when making direct payments via the LIFE Debit MasterCard.

#### **LIFE - Linking Inclusive Families through social Events - Holiday Home**

**This account is also a business account and was set**

up with the goal of working towards buying and operating a holiday home of some description for our families. To date nothing has been deposited or withdrawn from this account and remains at a zero balance.

**Membership: £470.00**

**2 x Membership Sign up Events**

**Sunday 25<sup>th</sup> September 2022 @ 10.30am, 1.30pm & 4.30pm**

**Saturday 04<sup>th</sup> March 2023 @ 10.30am, 1.30pm & 4.30pm**

**Initial membership fee was charged @ £10.00 per family due to there being only 6 full months remaining in the financial year from the day of sign up.**

**Social Fundraising Evening Events:**

**We successfully hosted two fundraising evenings of our own, both held @ The Market Street Club, Barry.**

**Friday 17<sup>th</sup> February 2023 - Back to the 80's Disco**

**Saturday 18<sup>th</sup> March 2023 - Race Night**

**We are always exceptionally grateful for the funding we receive from grants, fundraising contributors, and funding donors as without these contributions we would not be able to carry out the charity's main aims and objectives.**

**This year we received grants and donations totalling £1080.00 from the following companies:**

**Grants & Donations: £1080.00**

- 1. Ogi £250.00 (Unrestricted)**
- 2. Costco (Cardiff) £80.00 (Unrestricted)**
- 3. Newydd Housing Association £750.00 (Restricted)**

**Fund Accounting:**

**Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.**

**Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.**

## **Section F**

## **Other optional information**

### **LIFE - Linking Inclusive Families through social Events.**

**We are immensely proud what has been achieved in getting LIFE set up and registered as a charity and the small team of staff who strive continuously to go the extra mile through their passion for helping children and young people with learning disabilities.**

**We are a charity that is still very much in its infancy but thrilled to state we are experiencing a rapid growth of members, indicating that there is a real need within our community and surrounding area for a charity like LIFE - Linking Inclusive Families through social Events.**

**As a small charity we are continually learning and expanding our knowledge from the regular occurrences we face and experience on a regular basis. This enables us as a committee to discuss, reflect and evolve in making adaption's going forward for the future benefit of the charity.**

**We continue to reach out to families across the Vale of Glamorgan and surrounding areas, using social media as a platform to engage. We are pleased to state that through our service delivery the children/young adults and their families are excelling in accessing social and recreational activities that without us may not have either had the confidence or opportunity to access. This makes being a trustee/volunteer for L.I.F.E extremely rewarding.**

**We are beginning to network and establish professional relationships with local venues, partner organisations and outside agencies recognising what we do best and aligning our projects to deliver services most needed.**

**We must emphasise that the work our volunteers dedicate to LIFE is exceptional, and we could not do our work without them. The trustees would like to take this opportunity to acknowledge LIFE'S volunteers for their**

**support and thank them for the enormous amount of time and effort each volunteer has contributed, this has most definitely played a vital part in our initial year's success.**

**We would like to extend special thanks to Jodie Davies from Vale Bookkeeper Limited for her patience in supporting and guiding us in managing and monitoring our financial affairs to enable us to produce our first set of end of year accounts. This was very kindly provided free of charge by Jodie as a gesture of goodwill.**

**And finally, our thanks go to all our families, who inspire us to serve and support them, to lead fulfilling lives and live their L.I.F.E to the full.**



## Section G

## Declaration

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

Signed on behalf of the charity's trustees

Signature(s)

|  |  |
|--|--|
|  |  |
|--|--|

Full name(s)

|                        |                          |
|------------------------|--------------------------|
| Rachael Louise Sherman | Emma Elizabeth Griffiths |
|------------------------|--------------------------|

Position (eg Secretary,  
Chair, etc)

|             |  |
|-------------|--|
| Chairperson |  |
|-------------|--|

Date

|            |
|------------|
| 30/01/2024 |
|------------|

30/01/2024

# Profit and Loss

## L.I.F.E Linking Inclusive Families Through Social Events For the year ended 31 March 2023

2023

### Turnover

|                           |                 |
|---------------------------|-----------------|
| Event Income              | 7,499.50        |
| Grant Income              | 1,080.00        |
| Membership Renewal Income | 470.00          |
| <b>Total Turnover</b>     | <b>9,049.50</b> |

### Cost of Sales

|                            |                 |
|----------------------------|-----------------|
| DBS                        | 128.80          |
| Event Costs                | 8,040.81        |
| Lanyards/ID                | 30.00           |
| <b>Total Cost of Sales</b> | <b>8,199.61</b> |

|                     |               |
|---------------------|---------------|
| <b>Gross Profit</b> | <b>849.89</b> |
|---------------------|---------------|

### Administrative Costs

|                                   |               |
|-----------------------------------|---------------|
| General Expenses                  | 85.42         |
| Insurance                         | 309.44        |
| <b>Total Administrative Costs</b> | <b>394.86</b> |

|                         |               |
|-------------------------|---------------|
| <b>Operating Profit</b> | <b>455.03</b> |
|-------------------------|---------------|

|  |               |
|--|---------------|
| <b>Profit on Ordinary Activities Before Taxation</b> | <b>455.03</b> |
|--|---------------|

|                              |               |
|------------------------------|---------------|
| <b>Profit after Taxation</b> | <b>455.03</b> |
|------------------------------|---------------|