

WALEZI-CAREGIVERS KENYA

England & Wales · Charity number 1204235

Details

Status Registered

Legal form CIO

Registered 2023-08-07

Register [View on the Charity Commission register](#)

Contact

Address 5 Cintra Road
Norwich
NR1 4AE

Phone 07775901367

Email joe.waring@btinternet.com

Activities

Objects: 1. THE PREVENTION OF RELIEF OF POVERTY IN KENYA BY PROVIDING: A. GRANTS, ITEMS AND SERVICES TO INDIVIDUALS IN NEED AND/OR CHARITIES, OR OTHER ORGANISATIONS WORKING TO PREVENT OR RELIEVE THE POVERTY OF ADULTS AND CHILDREN WITH DISABILITIES AND THEIR CAREGIVERS; B. THE ADVANCEMENT OF EDUCATION, TRAINING AND ALL THE NECESSARY SUPPORT DESIGNED TO ENABLE INDIVIDUALS WHO HAVE DISABLED FAMILY MEMBERS TO GENERATE A SUSTAINABLE INCOME AND BE SELF-SUFFICIENT. 2. THE RELIEF OF SICKNESS AND THE PRESERVATION OF HEALTH OF PEOPLE WITH DISABILITIES AND THEIR CAREGIVERS RESIDING IN KENYA THROUGH THE PROVISION OF FINANCIAL ASSISTANCE, SUPPORT, EDUCATION AND PRACTICAL ADVICE. 3. THE PROMOTION OF EQUALITY FOR WOMEN, AND FOR CHILDREN AND ADULTS WITH DISABILITIES IN KENYA BY ENCOURAGING A CULTURE IN FAVOUR OF EQUALITY.

Activities: We help to develop and support self-help groups of caregivers of children and adults with disabilities. We encourage caregivers to support each other financially and emotionally and to gain skills. We give funds to enable groups to embark on money-making capital projects. The profits are used to benefit the health, education and wellbeing of loved ones with disabilities.

Classification

- **How:** Provides Other Finance, Provides Buildings/facilities/open Space, Provides Services, Provides Advocacy/advice/information
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** People With Disabilities, Other Defined Groups

Geography

- Kenya

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£36,952	£28,698	-	-
2024-12-31	£51,323	£44,229	-	-

Trustees

Name	Role	Appointed
Dr Karen Teresa Bunning PhD	Chair	2023-08-07
Elizabeth Child Hartley B.A. Hons		2023-08-07
Joseph Patrick Waring BA, DIP SW		2023-08-07
Kanchan Kapoor		2025-09-29

WALEZI-CAREGIVERS KENYA

England & Wales - Charity number 1204235

Accounts

WALEZI-CAREGIVERS KENYA



Charitable Incorporated Organisation (CIO)
Registered Charity Number: 1204235

Trustee's Annual Report

Financial Statements and Independent Examiner's Report

For the year ending 31 December 2025

Contents

	PAGE
Trustees' Annual Report	3
Reference and Administrative Details	3
Structure, Governance, and Management	3
Objectives and Activities	3
Achievements and Performance	4
Financial Review	4
Plans for Future Periods	7
Reserves Policy	7
Statement of Responsibilities of the Trustees	8
Independent Examiner's Report	9
Statement of Financial Activities (SoFA)	10
Statement of Financial Position (SoFP)	11
Notes to the Financial Statements	12

Trustees' Annual Report

For the year ending 31 December 2025

Reference and Administrative Details

- **Charity Name:** Walezi-Caregivers Kenya
- **Charity Number:** 1204235
- **Registered Address:** 5 Cintra road, Norwich, Norfolk, NR1 4AE, UK
- **Website:** www. walezi-caregivers-kenya.org
- **Trustees Serving in the Period:**

TRUSTEE NAME	POSITION	APPOINTMENT	RESIGNATIONS
Karen Bunning	Chairperson	7 August 2023	-
Joseph Patrick Waring	Secretary	7 August 2023	-
Sally Hartley	Trustee	7 August 2023	Deceased 5 December 2025
Elizabeth Hartley	Trustee	7 August 2023	-
Kanchan Kapoor	Treasurer	29 September 2025	

- **Bankers:** CAF Bank Ltd, 25 Kings Hill Avenue, Kings Hill, Kent, ME19 4JQ, UK
- **Independent Examiner:** Glenda Munyukwi, FCCA, 81 Rue Le Caravage, Parc de la Lironde, 34000, Montpellier, France

Structure, Governance, and Management

Walezi-Caregivers Kenya was registered as a Charitable Incorporated Organisation (CIO) on 7 August 2023. It is governed by its constitution dated 2 August 2023, and trustees are appointed in accordance with this document.

The founding trustees had been appointed and actively engaged in preparatory work prior to the charity's registration, with Trustee Eligibility Declarations signed in January 2023.

No sub-committees were formed during this reporting period.

Objectives and Activities

Walezi-Caregivers Kenya was established following over a decade of collaborative research in the UK and Kenya into the lives of children with learning and developmental disabilities, with a particular focus on community inclusion. These research efforts led the founding team to study self-help groups in Kilifi, a coastal town in Kenya where 71.4% of the population lives in poverty - many in homes made of mud, without access to electricity or running water.

The charity's primary objective is to establish empowering self-help groups formed by caregivers of children and family members living with disabilities. This is achieved through a community-based rehabilitation approach, with a strong emphasis on local ownership and inclusion. The beneficiaries include the children and family members with disabilities and the caregivers themselves.

Walezi-Caregivers Kenya supports this mission by fundraising in the UK and providing grants to its partner NGO, **Walezi Foundation Kenya**, which was established in 2022. The foundation is led by its Executive Director, Dr Joseph Karisa Gona.

The term "*Walezi*" refers to the Swahili equivalent of guardians and caregivers (plural).

Achievements and Performance

In the period 1 January 2025 - 31 December 2025 Walezi-Caregivers Kenya was focused on the growth of the self-help group portfolio and the building of capacities within each group. The work concentrated on extending the self-help group coverage of Kilifi County. Recruitment of caregivers and their children and family members with disabilities to form new self-help groups was carried out by referral from Kuhenza for the Children Foundation (a non-government funded organisation also located in Kilifi working with children with disabilities) and caregiver-initiated communication with our partner organisation: Walezi Foundation Kenya. Caregivers from a similar location were brought together at an inaugural group meeting for induction to the self-help group model and development process. From here, each group was supported to write its own constitution and to register as a self-help group with the county government, open a group bank account and set up individual shares and savings for its members.

By the end of December 2025, a total of **20 self-help groups** were operational serving a collective membership of **299** consisting of: **218 caregivers, 59 associates** (members of the local community), **22 adult members with disabilities**, and **256 children/family members with disabilities** in the various sub-locations of Kilifi, Kenya. Group 11 is currently inactive due to dispersal of the membership. This will be followed up in 2026. Each active self-help group met at regular intervals – either weekly or fortnightly with the exception of the rainy seasons when caregivers must prioritise farming their land.

Service events were delivered in the form of facilitated self-help group meetings, conducted by our partner organisation Walezi Foundation Kenya, for the purposes of:

- **Economic empowerment** (including drafting funding applications to the National Council for Persons with Disabilities and to the UK-based charity for capital projects)
- **Peer support** and sharing of personal situations amongst the caregivers to reduce social isolation and increase support
- **Community inclusion** for increasing presence and visibility of children and family members with disabilities in the local community
- **Access to health and education** for children and family members with disabilities (including visits to health clinics, vaccinations and enrolment in school)
- **Sensitisation** to promote disability awareness amongst the local community
- Meeting the **needs of children and family** members with disabilities through shared development of practical solutions to difficulties as they are presented.

Each self-help group was allocated 1-2 service events per month: 15 established groups participated in 1 service event per month; 6 newly established groups participated in 2 service events per month. A total of **324 service events** was completed in 2025 attended by an average of **12 caregivers per event** (a total of **3,388 attendees** were involved).

In addition to individual shares and savings, table banking (based on member subscriptions for the granting of individual loans) continued for supporting home management of finances. Income generation was carried out through group-based livelihood activities. The **9 successful capital projects** awarded in the previous year (2024: poultry rearing = 3 groups; building market stalls = 1 group; tents and chairs for hire for community events = 3 groups; building a water tank for sale of water = 1 group; building a café for the sale and storage of palm wine = 1 group) continued to develop. In addition, 1 group was successful in applying for funds from the National Council for Persons with Disabilities and was awarded £574.00 to purchase sewing machines and

associated materials (fabrics, threads and other haberdashery items) for the setup of a seamstress business. 2 other groups registered with the council: 1 group submitted a funding application to increase their stock of tents and chairs in their hire business (proposed amount: £1,400); 1 group commenced drafting their livelihood proposal for poultry rearing – aiming to submit by April 2026.

Other livelihood activities continued more generally in all the groups and include farming (growing vegetables for market); livestock rearing (dairy cow; poultry; goats); making liquid soap for market; weaving makuti (palm fronds) tile for thatched roofs.

The below table 1 summarises the savings for the groups. 8 of the groups made a profit from their livelihood and economic activities as highlighted in yellow in table 1, ranging from £12 to £260.

Table 1. Summary of group finances

SELF-HELP GROUP	KENYAN SHILLINGS			GBP CONVERSION		
	INDIVIDUAL SAVINGS	GROUP PROFITS	FINAL GROUP SAVINGS	INDIVIDUAL SAVINGS	GROUP PROFITS	FINAL GROUP SAVINGS
1	5,200	0	5,200	£30	£0	£30
2	2,700	0	2,700	£16	£0	£16
3	40,225	0	40,225	£232	£0	£232
4	14,000	12,000	26,000	£81	£69	£150
5	Withdrew all savings to purchase a cow for group project					
6	0	3,389	3,389	£0	£20	£20
7	2,400	9,200	11,600	£14	£53	£67
8	700	2,000	2,700	£4	£12	£16
9	0	4,800	4,800	£0	£28	£28
10	4,000	0	4,000	£23	£0	£23
11	INACTIVE					
12	12,750	45,050	57,800	£74	£260	£334
13	15,500	14,500	30,000	£89	£84	£173
14	32,250	35,458	67,708	£186	£204	£390
15	107,000	0	107,000	£616	£0	£616
16	28,800	0	28,800	£166	£0	£166
17	3,450	0	3,450	£20	£0	£20
18	1,300	0	1,300	£8	£0	£8
19	1,200	0	1,200	£7	£0	£7
20	15,300	0	15,300	£88	£0	£88
21	15,850	0	15,850	£92	£0	£92
TOTAL	286,775	126,397	413,172	£1,654	£730	£2,384

- * **INDIVIDUAL SAVINGS** ~ Individual caregiver books on their savings and shares within a self-help group
- * **GROUP PROFITS** ~ Profits generated by the self-help groups through their livelihood projects
- * **FINAL GROUP SAVINGS** ~ Total groups savings after income generated from livelihood projects

Table 2. Summary of Quality-of-Life (QoL) checks (July-December 2025)

NOTE: Percentage scores given for indicators where **unique individuals are counted once**, as opposed repeated service events involving the same individual.

QoL Checks	SUM (%) Range
Education	
# of children with disabilities attending school	85 (33%)
# of group members attending workshops & learning events	33 (11%)
Health	
# of children/family members with disabilities attending health services (hospital/clinic or health centre)	95
Livelihood	
# of group members with individual businesses	89
# of group livelihood projects per group	0-3
Empowerment	
# of members participating in community events or meetings	101
# of members elected to positions of leadership, e.g. village leader	44 (15%)
# of members consulted to join community committees	40 (13%)
Psycho-social	
# of members attending social gatherings (e.g. weddings, funerals, meetings, chiefs barazas)	259
# of visits to individual members by groups	65 (22%)

The children and family members with disabilities have benefitted from the groups as follows:

- Support for food, clothing and skin oils for children
- Sponsoring children with disabilities to attend school (either local mainstream, special day or boarding school) and payment of school fees, purchase of uniforms etc
- Financial support for transport to attend health appointments (e.g. attendance of clinic in Mombasa to check shunt in child with hydrocephalus).

The caregivers have benefitted through mutual psychological support; financial support and help with financial management. One group described how they visit new members by a small delegation visiting the person's home with gifts such as a bag of rice and skin oils for the child with disabilities. Another group gives the members dividends from their savings and two chickens to take home for Christmas celebrations. This same group closes the year with a party which includes an evaluation of their successes and what they would like to achieve in the coming year.

Financial Review

During the period, the charity raised a total of **£36,912 in unrestricted donations**. The two largest donations comprised **£35,000 from CP Charitable Trust** and **£1,377 from The King's School, Australia**. All remaining donations, totalling approximately **£535**, were received via online fundraising platforms or by cheque. In addition, the charity earned **£40 in bank interest** during the year.

Total expenditure for the period amounted to **£28,698**, the majority of which (£26,699) was granted to the charity's Kenyan partner organisation, **Walezi Foundation**, to support the delivery of charitable activities. **Support and overhead costs totalled £1,874**, largely relating to governance expenditure (£996). These included costs associated with recruiting a volunteer accountant and subsequent fees to support her transition into the role of **Treasurer on the Board of Trustees**, paid to **Accounting for International Development (AfID)**.

Website-related costs amounted to **£560**, comprising **£240 for annual web hosting** and **£320 for website updates**. Fundraising costs totalled **£252**, incurred over a six-month period. The charity subsequently terminated its contract with the donation platform due to high fixed fees.

A further **£66** was spent on **bank charges**, monthly fees and to receive the donation from Australia.

The charity recorded **net income of £8,254** for the period, of which approximately **£8,100 had been granted to Walezi Foundation by 3 January 2026**.

The charity began the period with reserves of **£7,094** and ended the year with **£15,348 in unrestricted funds**, to be carried forward into 2026. The Trustees aim to maintain reserves to support self-help group proposals for **capital projects that contribute to long-term financial sustainability**.

All funds are held in the charity's bank account. The charity has **no other current assets and no liabilities**.

The charity's principal funder is **CP Charitable Trust**, which has committed funding for the next two years (**£35,000 in 2026 and £20,000 in 2027**). This provides the Trustees with a degree of financial stability and sufficient time to seek and diversify additional sources of funding.

Plans for Future Periods

In 2026, Walezi-Caregivers Kenya will maintain a steady fundraising and grant-making approach, with no planned expansion. The charity will continue to support Walezi Foundation Kenya through consistent financial support, ongoing monitoring, and technical assistance to strengthen its community-based work with caregivers of children with disabilities.

During 2025, Walezi-Caregivers Kenya held a series of discussions with Carers Worldwide, a UK-registered charity working predominantly in South Asia, regarding the potential transition of long-term support for Walezi Foundation Kenya. However, the operating models of the two organisations were found to be incompatible. Walezi-Caregivers Kenya follows a bottom-up approach, bringing caregivers together into self-help groups as the first step towards empowerment, while Carers Worldwide operates a top-down model implemented through local partners. Following discussions between trustees of both charities, it was agreed to continue with Walezi-Caregivers Kenya's current model. Future collaboration may still be possible.

Reserves Policy

As at the reporting date, the charity had not established a written Reserves Policy, however, aims to maintain 3 – 6 months of expenses in reserves.

Statement of Responsibilities of the Trustees

The trustees are responsible for preparing the trustees' report and financial statements in accordance with applicable law and UK Accounting Standards. They are also responsible for ensuring proper accounting records are kept.

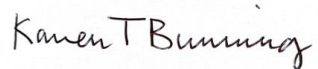

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period.

In preparing those financial statements, the trustees are required to

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by order of the board of trustees and signed on its behalf by:

Trustee	Date	Signature
Karen Bunning (Chair)	26 th January 2026	
Joseph Waring (Secretary)	26 th January 2026	

Independent Examiner's Report

Independent Examiner's Report to the Trustees of Walezi-Caregivers Kenya

I report on the accounts of the charity for the year ended 31 December 2025, which are set out on pages 10 -14.

Responsibilities and Basis of Report

As the charity's trustees, you are responsible for the preparation of the accounts. I have been appointed as independent examiner and report in accordance with Regulation 31 of the Charities (Accounts and Reports) Regulations 2008.

My examination was carried out in accordance with general directions given by the Charity Commission. It includes a review of the accounting records and a comparison with the accounts presented.

Examiner's Statement

In connection with my examination, no matter has come to my attention:

1. to give me reasonable cause to believe that the accounting records have not been kept in accordance with section 130 of the Charities Act 2011; or
2. to which, in my opinion, attention should be drawn to enable a proper understanding of the accounts to be reached.

Glenda Munyukwi, FCCA, CFE

Glenda Munyukwi

81 Rue Le Caravage, Parc de la Lironde, 34000, Montpellier, France

26 January 2026

STATEMENT OF FINANCIAL ACTIVITIES (SoFA)
For the year ended 31 Dec 2025
Walezi-Caregivers Kenya

	Notes	Unrestricted Funds Only Jan - Dec 2025 £	Unrestricted Funds Only Aug 2023 - Dec 2024 £
INCOME			
Donations – Unrestricted	2	£36,912	£51,286
Donations – Restricted		£0	£0
Gift Aid Income		£0	£0
Grant Income – Restricted		£0	£0
Other Income		£41	£37
TOTAL INCOME		£36,952	£51,323
EXPENDITURE			
Charitable Activities			
Partner Grant – Kenya NGO	3	£26,699	£40,869
Monitoring & Evaluation		£0	£0
Program Staff Costs		£0	£0
Capacity Building for Partner		£0	£873
Bank Fees – International Transfers		£125	£150
Travel – Kenya		£0	£189
Communication – Kenya Partner		£0	£0
Sub-Total Charitable Activities		£26,824	£42,080
Support / Overhead Costs			
Office Support & Admin	5	£66	£65
Governance Costs – Independent Examiner	5	£996	£0
Trustee Expenses		£0	£0
Website & Comms	5	£560	£1,664
Fundraising Costs	5	£252	£420
Sub-Total Support / Overhead Costs		£1,874	£2,149
TOTAL EXPENSES		£28,698	£44,229
NET INCOME/ (EXPENDITURE)		£8,254	£7,094
FUNDS BROUGHT FORWARD		£7,094	£0
FUND CARRIED FORWARD		£15,348	£7,094

STATEMENT OF FINANCIAL POSITION (SoFP)

As at 31 Dec 2025

Walezi-Caregivers Kenya

	Notes	Unrestricted Funds Only 31-Dec-25 £	Unrestricted Funds Only 31-Dec-24 £
CURRENT ASSETS			
BANK ACCOUNTS			
	6		
CAF Bank – GBP		£15,209	£7,074
Stripe - GBP		£0	£0
PayPal - GBP		£139	£0
Debtors	7	£0	£20
Prepayments		£0	£0
TOTAL CURRENT ASSETS		£15,348	£7,094
CURRENT LIABILITIES			
Accruals		£0	£0
Creditors		£0	£0
TOTAL CURRENT LIABILITIES		£0	£0
NET ASSETS		£15,348	£7,094
FUNDS			
Unrestricted Funds		£7,094	£0
Restricted Fund		£0	£0
Designated Funds		£0	£0
Net Income		£8,254	£7,094
TOTAL FUNDS	9	£15,348	£7,094

Notes to the Financial Statements

1. Accounting Policies

a. Basis of preparation

- The Charities SORP (FRS 102),
- FRS 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland, and
- the Charities Act 2011.

Walezi-Caregivers Kenya is a public benefit entity.

2. Analysis of Income

All sources of income were unrestricted and are broken down as follows:

Source of Funds	Type of Funds	Jan - Dec 2025	Aug 2023 - Dec 2024
CP Charitable Trust	Unrestricted Donations	£35,000	£49,667
Kings School, Australia	Unrestricted Donations	£1,377	£0
Website Donations (via <i>Stripe</i>)	Unrestricted Donations	£122	£0
Website Donations (via <i>PayPal</i>)	Unrestricted Donations	£139	£0
Website Donations (via <i>Enthuse</i>)	Unrestricted Donations	£173	£484
Cheque Donations	Unrestricted Donations	£100	£0
Sally Hartley (Trustee)	Unrestricted Donations	£0	£635
Joseph Waring & Karen Bunning (Trustees)	Unrestricted Donations	£0	£500
Bank Interest	Other Income	£41	£37
TOTAL INCOME		£36,952	£51,323

3. Grants and payments to Walezi Foundation Kenya

During the reporting period, the charity made the following 5 grants to Walezi Foundation Kenya.

Date	Type	Amount £	Amount KES
9-Jan-25	Unrestricted Grant	£3,780	590,775
18-Feb-25	Unrestricted Grant	£4,458	710,925
1-Apr-25	Unrestricted Grant	£6,402	1,049,425
26-Jun-25	Unrestricted Grant	£5,977	1,039,425
2-Oct-25	Unrestricted Grant	£6,082	1,039,425
TOTAL GRANTS Jan - Dec 2025		£26,699	4,429,975
TOTAL GRANTS Aug 2024 - Dec 2025		£41,186	6,898,151

4. Examiner's fees

Conducted pro-bono

5. Expenditure Explanations

The charity incurred the following Expenditures. Overhead exceptionally comprised of 6.5% of total expenses, due to Governance costs, i.e. recruitment of a Treasurer and Board of Trustee.

EXPENSES	EXPLANATION	Jan - Dec 2025	Aug 2023 - Dec 2024
CHARITABLE ACTIVITIES			
Partner Grants	Grants to Walezi Foundation in Kenya	£26,699	£40,869
FX Bank Fees	Costs of transfers to Kenya	£125	£150
Capacity Building for Partner	CAN Africa Conference participation	£0	£873
Travel – Kenya	Trustee monitoring domestic travel costs	£0	£189
SUB-TOTAL		£26,824	£42,080
SUPPORT / OVERHEADS			
Office Support & Admin	Monthly bank fees, and for foreign donations	£66	£65
Governance Costs	AfID* membership and fees for Volunteer Accountant and Trustee Recruitment	£996	£0
Website & Comms	Website updates and monthly web hosting	£560	£1,664
Fundraising Costs	Enthuse platforms fees* Jan - Jun 2025	£252	£420
SUB-TOTAL		£1,874	£2,149
GRAND TOTAL		£28,698	£44,229

* Accounting for International Development (AfID) – an organisation supporting and connecting charities with professional accounting volunteers, advisors, or Board of Trustees etc, for fees.

** In July 2025 the Charity cancelled their contract with the online Enthuse platform due to high monthly fixed fees, switching to Stripe and later PayPal.

6. Bank Accounts / Payment Processing Services Held

The charity held the following bank account:

Bank Name: CAF Bank Ltd
Bank Address: 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4JQ
Account Name: Walezi-Caregivers Kenya
Account Number: 00036626
Sort Code: 40-52-40
IBAN: GB79CAFB40524000036626

Gross Interest Rate: 0.20%

Monthly Account Keeping Fee: £5

FX International Transfer Fee: £25

Bank Balance on 31 December 2024: £7,074.29

The charity also opened 2 payment processing services in the name of Walezi-Caregivers Kenya to receive donations:

- 1) Stripe
- 2) PayPal

7. Debtors

As at 31 December 2024, the charity was owed the following monies

DEBTOR NAME	DATE OF DEBT	AMOUNT £	PURPOSE
Max Web Design	15 April 2024	£20	Double payment for web hosting

As at 31 December 2025, these monies were paid back in full

8. Related Party Transactions & Trustee Remuneration

During the period, no Trustees received any funds or reimbursements from the charity.

Trustees are not remunerated and receive no benefits.

9. Movement in Funds

Net movement of funds comprise only of unrestricted funds, as follows:

As at 1 Jan 2025	Income	Expenses	As at 31 Dec 2025
£7,094	£36,952	£28,698	£15,348

WALEZI-CAREGIVERS KENYA

England & Wales - Charity number 1204235

Accounts

WALEZI-CAREGIVERS KENYA



Charitable Incorporated Organisation (CIO)
Registered Charity Number: 1204235

Trustee's Annual Report

Financial Statements and Independent Examiner's Report

For the period 7 August 2023 to 31 December 2024

Contents

	PAGE
Trustees' Annual Report	3
Reference and Administrative Details	3
Structure, Governance, and Management	3
Objectives and Activities	3
Achievements and Performance	4
Financial Review	5
Plans for Future Periods	6
Reserves Policy	6
Statement of Responsibilities of the Trustees	6
Independent Examiner's Report	7
Statement of Financial Activities (SoFA)	8
Statement of Financial Position (SoFP)	9
Notes to the Financial Statements	10

Trustees' Annual Report

For the period 7 August 2023 – 31 December 2024

Reference and Administrative Details

- **Charity Name:** Walezi-Caregivers Kenya
- **Charity Number:** 1204235
- **Registered Address:** 5 Cintra road, Norwich, Norfolk, NR1 4AE, UK
- **Website:** www. walezi-caregivers-kenya.org
- **Trustees Serving in the Period:**

TRUSTEE NAME	POSITION	APPOINTMENT	RESIGNATIONS
Karen Bunning	Chairperson	7 August 2023	-
Joseph Patrick Waring	Secretary	7 August 2023	-
Sally Hartley	Trustee	7 August 2023	-
Elizabeth Hartley	Trustee	7 August 2023	-

- **Bankers:** CAF Bank Ltd, 25 Kings Hill Avenue, Kings Hill, Kent, ME19 4JQ, UK
- **Independent Examiner:** Kanchan Kapoor, FCCA, 58 Rue Rodier, 75009, Paris, France

Structure, Governance, and Management

Walezi-Caregivers Kenya was registered as a Charitable Incorporated Organisation (CIO) on 7 August 2023. It is governed by its constitution dated 2 August 2023, and trustees are appointed in accordance with this document.

The founding trustees had been appointed and actively engaged in preparatory work prior to the charity's registration, with Trustee Eligibility Declarations signed in January 2023.

No sub-committees were formed during this reporting period.

Objectives and Activities

Walezi-Caregivers Kenya was established following over a decade of collaborative research in the UK and Kenya into the lives of children with learning and developmental disabilities, with a particular focus on community inclusion. These research efforts led the founding team to study self-help groups in Kilifi, a coastal town in Kenya where 71.4% of the population lives in poverty - many in homes made of mud, without access to electricity or running water.

The charity's primary objective is to establish empowering self-help groups formed by caregivers of children and family members living with disabilities. This is achieved through a community-based rehabilitation approach, with a strong emphasis on local ownership and inclusion. The beneficiaries include the children and family members with disabilities and the caregivers themselves.

Walezi-Caregivers Kenya supports this mission by fundraising in the UK and providing grants to its partner NGO, **Walezi Foundation Kenya**, which was established in 2022. The foundation is led by its Executive Director, Dr Joseph Karisa Gona.

The term "*Walezi*" refers to the Swahili equivalent of guardians and caregivers (plural).

Achievements and Performance

In the period 7 August 2023 - 31 December 2023 Walezi-Caregivers Kenya was focused on the transition of the self-help group portfolio from a university-based research and development programme to the UK-registered charity. The work concentrated on establishing essential policies and reporting mechanisms and securing continuing funding for the work. The actual work on self-help groups between August and December 2023 was managed by a funded research project based at the University of East Anglia, UK (2018-23) where the Chairperson of the UK charity was the Principal Investigator. The project aimed to evaluate the sustainability of 11 self-help groups for caregivers of children with disabilities within a changing context. During this period there was the Covid-19 pandemic. The outcomes associated with this research project are published as an open access paper in an academic journal¹.

By the end of December 2024, a total of **16 self-help groups** were operational serving a collective membership of **106 caregivers and 40 associates** (family members and people living with disabilities) in the various towns of Kilifi, Kenya, each with their own success stories. The groups were introduced to individual shares and savings with each member having a hand-held booklet recording the amount of their savings. These act as shares in the group against which members may draw loans. Each self-help group met at regular intervals – either weekly or fortnightly with the exception of the rainy seasons when caregivers must prioritise farming their land.

The number of caregivers and associate members registered to and participating in the groups tend to vary across the year, affected by family relocation and the seasons (e.g. during the rainy season attendance of group meetings is at its lowest as members need to farm their family small holdings).

In addition to individual shares and savings, group activities for supporting home management of finances also included table banking, which is based on member subscriptions for the granting of individual loans. Income generation was carried out through group-based livelihood activities that have been maintained since the research programme (2018-23) or have been developed since the start of 2024 through a capital funding grant made by the charity. Nine of the fourteen groups have applied successfully to the charity for funds to support their capital projects (poultry rearing: 3 groups; building market stalls: 1 group; tents and chairs for hire for community events: 3 groups; building a water tank for sale of water: 1 group; building a café for the sale and storage of palm wine: 1 group). Other livelihood activities happen more generally in all the groups and include farming (growing vegetables for market); livestock rearing (dairy cow; poultry; goats); making liquid soap for market; weaving makuti (palm fronds) tile for thatched roofs. Two groups applied for capital project funds from the National Council for Persons with Disabilities in Kenya and were awarded Ksh100,000 (£60) each. One group used the fund to set up a poultry rearing business and the other bought a plot of land with bedsit to rent out.

The following table 1. summarises the savings in the bank for groups (excluding groups 15 and 16 who are in the early stages of development).

¹ **Bunning, K.**, Gona, J.K., Wanjala, S.W. & Hartley, S. (2025). The sustainability of self-help-groups for caregivers of children with disabilities in Kilifi, Kenya: The changing context of the COVID-19 pandemic. *Child Care, Health & Development* 51(3), e70079. <https://doi.org/10.1111/cch.70079>

Table 1. Summary of group finances

Self-Help Group*	Bank statement: Total Savings		Shares & savings: Total of Members' booklets		Profit	
	Kenyan Shillings	GBP £	Kenyan Shillings	GBP £	Kenyan Shillings	GBP £
1	N/A		N/A		N/A	
2	Ks. 13,514	£81	Ks. 13,514	£81	Ks. 0	£0
3	Ks. 13,276	£79	Ks. 13,276	£79	Ks. 0	£0
4	Ks. 6,121	£37	Ks. 2,800	£17	Ks. 3,321	£20
5	Ks. 9,000	£54	Ks. 9,000	£54	Ks. 0	£0
6	Ks. 51,797	£309	Ks. 51,797	£309	Profit to be banked: Ks 50,000 / £299	
7	Ks. 45,853	£274	Ks. 15,000	£90	Ks. 30,000.	£179
8	Ks. 14,531	£87	Ks. 9,531	£57	Ks. 5,000	£30
9	Statements unavailable					
10	INACTIVE SINCE COVID-19					
11	INACTIVE SINCE COVID-19					
12	Ks. 29,389	£175	Ks. 5,000	£30	Ks. 24,389	£146
13	Ks. 16,749	£100	Ks. 9,034	£54	Ks. 7,715	£46
14	Ks. 20,737	£124	Ks. 4,737	£28	Ks. 16,000	£96

*Note: Groups 15 and 16 have yet to open a bank account

The children and family members with disabilities have benefitted from the groups as follows:

- Support for food, clothing and skin oils for children;
- Sponsoring children with disabilities to attend school (either local mainstream, special day or boarding school) and payment of school fees, purchase of uniforms etc;
- Financial support for transport to attend health appointments (e.g. attendance of clinic in Mombasa to check shunt in child with hydrocephalus).

The caregivers have benefitted through mutual psychological support; financial support and help with financial management. One group described how they visit any new member by a small delegation visiting the person's home with gifts such as a bag of rice and skin oils for the child with disabilities. Another group gives the members dividends from their savings and two chickens to take home for Christmas celebrations. This same group closes the year with a party and making evaluation of their success and what they would like to achieve in the coming year.

Financial Review

The charity raised a total of £51,323, all unrestricted donations. Expenditure totalled £44,187, of which £40,869 was granted to the Kenyan partner. Support was also provided for monitoring, reporting, and capacity building totalling £1,212. Support / Overheads costs totalled £2,107, majority of which was used to set up and maintain the UK website (£1,444). The charity ended the period with £7,136 in unrestricted funds, carried over to 2025.

Plans for Future Periods

In 2025, Walezi-Caregivers Kenya will maintain a steady fundraising and grant-making approach, with no planned expansion. The charity will continue to support the Walezi Foundation Kenya by providing consistent financial support, ongoing monitoring, and technical assistance to strengthen its community-based work with caregivers of children with disabilities.

Walezi-Caregivers Kenya is currently in discussion with **Carers Worldwide**, a UK-registered charity, working predominantly in South Asia, regarding the potential transition of long-term support for Walezi Foundation Kenya. If these plans progress, Carers Worldwide may assume responsibility for the partnership by the end of 2025 or early 2026.

Reserves Policy

As at the reporting date, the charity had not established a Reserves Policy. This policy shall be established in 2025.

Statement of Responsibilities of the Trustees

The trustees are responsible for preparing the trustees' report and financial statements in accordance with applicable law and UK Accounting Standards. They are also responsible for ensuring proper accounting records are kept.

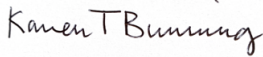

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period.

In preparing those financial statements, the trustees are required to

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by order of the board of trustees and signed on its behalf by:

Trustee	Date	Signature
Karen Bunning (Chair)	26 Aug 2025	
Joseph Waring (Secretary)	26 Aug 2025	

Independent Examiner's Report

Independent Examiner's Report to the Trustees of Walezi-Caregivers Kenya

I report on the accounts of the charity for the period 7 August 2023 to 31 December 2024, which are set out on pages 8 -10.

Responsibilities and Basis of Report

As the charity's trustees, you are responsible for the preparation of the accounts. I have been appointed as independent examiner and report in accordance with Regulation 31 of the Charities (Accounts and Reports) Regulations 2008.

My examination was carried out in accordance with general directions given by the Charity Commission. It includes a review of the accounting records and a comparison with the accounts presented.

Examiner's Statement

In connection with my examination, no matter has come to my attention:

1. to give me reasonable cause to believe that the accounting records have not been kept in accordance with section 130 of the Charities Act 2011; or
2. to which, in my opinion, attention should be drawn to enable a proper understanding of the accounts to be reached.

Kanchan Kapoor, ACCA, FCCA



58 Rue Rodier, 75009, Paris, France

26 August 2025

STATEMENT OF FINANCIAL ACTIVITIES (SoFA)
For period 7 August 2023 - 31 December 2024
Walezi-Caregivers Kenya

	Notes	Unrestricted Funds £	Restricted Funds £	TOTAL £
1 INCOME				
1000 Donations – Unrestricted	2	£51,286	-	£51,286
1010 Donations – Restricted		-	-	-
1020 Gift Aid Income		-	-	-
1030 Grant Income – Restricted		-	-	-
1040 Other Income	2	£37	-	£37
TOTAL INCOME		£51,323	-	£51,323
2 EXPENDITURE				
2.1 Charitable Activities				
2000 Partner Grant – Kenya NGO	3	£40,869	-	£40,869
2010 Monitoring & Evaluation		-	-	-
2020 Program Staff Costs		-	-	-
2030 Capacity Building for Partner	5	£873	-	£873
2040 Bank Fees – International Transfers	5	£150	-	£150
2050 Travel – Kenya	5	£189	-	£189
2060 Communication – Kenya Partner		-	-	-
Sub-Total 2.1 Charitable Activities		£42,080	-	£42,080
2.2 Support / Overhead Costs				
2100 Office Support & Admin	5	£65	-	£65
2110 Governance Costs – Independent Examiner	4	-	-	-
2120 Trustee Expenses	5	-	-	-
2130 Website & Comms	5	£1,664	-	£1,664
2140 Fundraising Costs	5	£420	-	£420
Sub-Total 2.2 Support / Overhead Costs		£2,149	-	£2,149
TOTAL EXPENSES		£44,229	-	£44,229
NET INCOME/ (EXPENDITURE)		£7,094	-	£7,094
FUNDS BROUGHT FORWARD		-	-	-
FUNDS CARRIED FORWARD		£7,094	-	£7,094

STATEMENT OF FINANCIAL POSITION (SoFP)
As at 31 Dec 2024
Walezi-Caregivers Kenya

	Notes	Unrestricted Funds £	Restricted Funds £	TOTAL £	
3					
CURRENT ASSETS					
3000	Bank Account – GBP	6	£7,074	-	£7,074
3010	Debtors	7	£20	-	£20
3020	Prepayments		-	-	-
	TOTAL CURRENT ASSETS		£7,094	-	£7,094
4					
CURRENT LIABILITIES					
4000	Accruals		-	-	-
4010	Creditors		-	-	-
	TOTAL CURRENT LIABILITIES		-	-	-
	NET ASSETS		£7,094	-	£7,094
5					
FUNDS					
5000	Unrestricted Funds		-	-	-
5010	Restricted Fund		-	-	-
5020	Designated Funds		-	-	-
5030	Net Income		£7,094	-	£7,094
	TOTAL FUNDS		£7,094	-	£7,094

Notes to the Financial Statements

1. Accounting Policies

a. Basis of preparation

- The Charities SORP (FRS 102),
- FRS 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland, and
- the Charities Act 2011.

b. First accounting period and comparatives

The charity was registered on 7 August 2023, and these financial statements cover the period 7 August 2023 to 31 December 2024. As this is the charity's first reporting period, no prior year comparatives are presented.

Walezi-Caregivers Kenya is a public benefit entity.

2. Analysis of Income

All sources of income were unrestricted and are broken down as follows:

Source of Funds	Type of Funds	Total £
CP Charitable Trust	Unrestricted Donations	49,667
Sally Hartley (Trustee)	Unrestricted Donations	635
Joseph Waring & Karen Bunning (Trustees)	Unrestricted Donations	500
Website Donations (via <i>Enthuse</i>)	Unrestricted Donations	484
Bank Interest	Other Income	37
	TOTAL	£51,323

3. Grants and payments to Walezi Foundation Kenya

During the reporting period, the charity made the following 4 grants and 1 direct expense payment to Walezi Foundation Kenya. The audited financial statements of Walezi Foundation Kenya reflect accurately the total income of KES 6,898,151.

Date	Type	Amount £	Amount KES
11-Jan-24	Unrestricted Grant	£5,929	1,183,000
26-Mar-24	Unrestricted Grant	£16,357	2,631,375
4-Jul-24	Unrestricted Grant	£8,180	1,312,000
8-Oct-24	Unrestricted Grant	£10,403	1,720,692
Sub-total Grants		£40,869	6,847,067
4-Sep-24	Direct payment for hotel to attend conference	£317	51,084
TOTAL GRANTS & PAYMENTS		£41,186	6,898,151

4. Examiner's fees

Conducted pro-bono

5. Other Expenditures

The charity incurred the following Other Expenditures, separate to the grants of £40,869

	EXPENSES	Amount £
CHARITABLE ACTIVITIES		
	Capacity Building for Partner	
	Registration Fees for CAN Africa Conference	£285
	Local travel costs (food, transport) for conference attendance	£271
	Transfer to Walezi Foundation for payment of lodging for conference	£317
	SUB-TOTAL	£873
	Bank Fees – International Transfers	
	CAF Bank charges for 6 international transfers to Kenya	£150
	Travel – Kenya	
	Trustee monitoring travel costs (domestic within Kenya)	£189
	Sub-Total Charitable Activities	£1,212
SUPPORT / OVERHEADS		
	Office Support & Admin	
	CAF monthly account keeping fees (£5 /month)	£65
	Website & Comms	
	Payments for Web Design and monthly web hosting	£1,579
	Payment for website Privacy Policy	£85
	SUB-TOTAL	£1,664
	Fundraising Costs	
	Website donation platform, monthly fees to Enthuse (£41.99/ month)	£420
	Sub-Total Support / Overheads	£2,149
	Total Other Expenditure (excluding Grants to Partner)	£3,361

6. Bank Accounts Held

The charity held one online bank account with CAF Bank Ltd, as follows:

Bank Address: 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4JQ
Account Name: Walezi-Caregivers Kenya
Account Number: 00036626
Sort Code: 40-52-40
IBAN: GB79CAFB40524000036626

Gross Interest Rate: 0.20%
Monthly Account Keeping Fee: £5
FX International Transfer Fee: £25

Bank Balance on 31 December 2024: £7,074.29

7. Debtors

As at 31 December 2024, the charity was owed the following monies

DEBTOR NAME	DATE OF DEBT	AMOUNT £	PURPOSE
Max Web Design	15 April 2024	£20	Double payment for web hosting
TOTAL		£20	

8. Related Party Transactions & Trustee Remuneration

During the period, no Trustees received any funds from the charity, other than reimbursements for costs incurred for charitable purposes.

Trustees are not remunerated and receive no benefits.

3 Trustees donated funds to the charity, totalling £1,135

9. Movement in Funds

Net movement of funds comprise only of unrestricted funds, as follows:

As at 7 Aug 2023	Income	Expenses	As at 31 Dec 2024
£0	£51,323	£44,229	£7,094